



Shaken not stirred?
The development of one tertiary
education sector in Australia

*Leesa Wheelahan, Sophie Arkoudis,
Gavin Moodie, Nick Fredman, Emmaline Bexley*

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Right from the time that we are small, 'spin' holds an attraction. Think of the childhood delight of a swirlingly multicoloured lollipop, of whirlygigs, or circus performers spinning through the air . . . and fairground rides.

In this work I have used 'spin' associated with the imagination and fantasy of the fairground as a metaphor for truth in contemporary life. My digital camera is capturing light over time. My camera is thus allowing us an insight, via these unmanipulated images, into something that is happening in the world in a way that we cannot see it.

This work is from NCVER's collection which features artwork by VET students.

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About the research

Shaken not stirred? The development of one tertiary education sector in Australia

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The number of 'mixed sector' institutions is likely to increase as the boundaries between vocational education and training (VET) and higher education become progressively blurred. Even though the sectoral divide is being eroded, it still shapes institutional relations and emerging hierarchies.

In 2009 the National Centre for Vocational Education Research (NCVER) published research examining the nature of higher education offered by public VET providers (*Higher education in TAFE* by Leesa Wheelahan, Gavin Moodie, Stephen Billett and Ann Kelly). This project extends that research by examining universities that offer a small amount of VET, and private providers that offer both VET and higher education.

Key messages

- The structure of provision differs by type of institution:
 - Unlike dual-sector universities, universities that offer a small amount of VET do so in a narrow range of fields for specific purposes.
 - Many mixed-sector TAFE (technical and further education) institutes are seeking to become new types of tertiary education institutions, such as polytechnics, which offer a comprehensive and complementary range of programs in both sectors.
 - Mixed-sector private providers generally focus on one or two fields of education. They are emerging as specialist providers geared to a particular industry.
- Mixed-sector TAFE institutes and private providers have similar challenges in developing scholarly cultures and strong academic governance, while mixed-sector universities have challenges in meeting VET's requirement for industry currency.

All mixed-sector providers argue that the requirements of complying with two different regulatory, quality assurance, funding, reporting, registration and accreditation regimes are onerous. Streamlined regulatory arrangements and a single statistical collection would be very helpful in supporting an integrated education sector.

Tom Karmel
Managing Director, NCVER

Contents

Tables	6
Abstract	7
Introduction	8
One tertiary education sector? Pressure on the sectoral divide	10
Economic and policy pressures on the sectoral divide	10
The tertiary sector, types of institutions and institutional aspirations	14
Scope of mixed-sector provision	16
Registration and accreditation of qualifications	17
Strengths and areas that need improvement	18
Perspectives, debates, dilemmas and issues	19
VET in universities	19
Mixed-sector provision in private providers	20
How mixed-sector provision differs between providers	22
VET-higher education divide and public-private divide	24
Dilemmas and debates about regulation and quality	25
Institutional, teacher and student identities	27
Institutional identities	27
Teacher identities	28
Student identities	29
Discussion and conclusion	32
Sectoral boundaries and the place of mixed-sector institutions	32
How can policy support mixed-sector institutions?	33
References	38
Appendices	
1: Methods	42
2: Profile of interviewees	49
3: Profile of mixed-sector universities and private providers	51
Support document details	64
Other publications in the NCVET Monograph Series	65

Tables

1	Categories of interviewee and number interviewed in each category	9
2	Numbers of each type of institution accredited to deliver both VET and higher education	17
A.1	Senior staff interviews	49
A.2	Profile of teachers	49
A.3	Profile of students interviewed for project	50
A.4	Other interviewees	50
A.5	Mixed-sector private providers reporting HE load in 2009 by VET scope of registration (excluding TAFE)	52
A.6	Number of mixed-sector non-self-accrediting private providers, excluding TAFE institutes, by state	56
A.7	Private providers which reported higher education student load (EFTSL) to DEEWR in 2009 and which were registered training organisations in 2011	56
A.8	Number and level of VET qualifications and main field of education in VET by university (excluding dual-sector universities and Bachelor Institute of Indigenous Tertiary Education)	58
A.9	VET and higher education provision of mixed-sector non-self-accrediting institutions, excluding TAFEs	60
A.10	TAFE institutes registered as higher education institutions, higher education EFTSL, and fields of education	63

Abstract

The sectoral divide between vocational education and training (VET) and higher education in Australia is blurring as a consequence of broader social and economic pressures for a more highly skilled population, but also as a consequence of government policies designed to develop tertiary education markets and to diversify institutional types. The mixed-sector institutions that are emerging are additional to Australia's five dual-sector universities, with their large higher education and TAFE (technical and further education) divisions. Mixed-sector institutions, on the other hand, are institutions with most of their student enrolments in one sector, but which are increasingly offering programs from the 'other' sector.

At March 2011 there were 90 institutions in Australia registered to offer programs from both sectors. This includes large dual-sector universities, universities with a small amount of VET provision, TAFE institutes that offer a small amount of higher education and private providers offering both.

While there is still only a small number of mixed-sector tertiary education institutions, their importance exceeds their size, since they offer different models for future institutional development and their emergence is a key way by which the government will achieve its objectives for institutional diversification and competition. However, they remain relatively under-researched. This project attempts to address this gap by examining universities that offer a small amount of VET and private providers that offer both VET and higher education programs. It complements a previous National Centre for Vocational Education Research (NCVER) project which researched TAFE institutes offering higher education and compared these with single-sector TAFE institutes and dual-sector universities. Both research projects used a similar research design to allow a comparison between different types of mixed-sector institutions and a consideration of the implications for tertiary education policy in Australia.

The sharp distinctions between the VET and higher education sectors are giving way to a more differentiated single tertiary education sector with greater institutional diversity. However, as this research shows, the result is a more stratified and hierarchical tertiary education sector, as university provision becomes the benchmark and comparator for other forms of provision.

Introduction

Two sectoral divides are being eroded within tertiary education in Australia. The first is between the sectors of education and the second is between public and private funding of tertiary education. Universities and other institutions established as higher education providers now offer vocational education and training (VET) programs, and technical and further education (TAFE) institutes and other institutions established as VET providers now offer higher education programs. TAFE institutes also offer VET in Schools programs and senior school certificates, while schools offer VET programs and first-year higher education subjects in association with universities. Private providers offer VET, higher education, senior school certificates and English language programs.

Apart from the five dual-sector universities that offer publicly funded VET, most universities' VET provision is privately funded; the higher education provided by TAFE institutes is mostly privately funded, but there are now some publicly funded government places at two TAFE institutes. Policy precludes private providers from accessing public higher education funding, although there are currently seven exceptions. There is no such policy in VET and private providers have increasing access to public VET funding. Students undertaking private or full-fee higher education and high-level VET programs are able to access income-contingent loans, and this is weakening the distinction between government-funded places and full-fee places in both VET and higher education.

Tertiary education is being reshaped, although its final shape is not yet clear. Institutional diversification is occurring and new institutional types are emerging. 'Mixed-sector' institutions that offer programs from different sectors are proliferating and will become an important institutional type in the future, with three interrelated and interdependent factors contributing to more fluid sectoral boundaries and institutional diversification. The first factor is that, like many countries, Australia is seeking to increase the percentage of the population with higher-level qualifications. The second factor relates to government targets to expand participation in and attainment from education, while the third is the imperative of government policies to diversify institutional types and create markets in education to enable educational providers to compete for students and funding.

There are 90 tertiary education providers in Australia registered to offer both VET and higher education. They include self-accrediting institutions (mostly universities), TAFE institutes, and private providers. There has been very little research on these institutions, yet they are becoming an increasingly important part of tertiary education in Australia. Their emergence is contributing to the blurring of the sectoral divide and resulting in new kinds of provision for students that are not constrained by existing sectoral structures and institutional types. This research project is the second of two NCVET projects designed to provide insights into these mixed-sector institutions. The objectives of both projects are: firstly, to provide research to support policy-makers and institutional leaders to develop policy and institutional and governance frameworks that best support the provision of high-quality VET and higher education qualifications in mixed-sector institutions; and, secondly, to provide research to support practitioners engaged in delivering VET and higher education qualifications in mixed-sector institutions to ensure they identify opportunities for students to pathways to further study and to high-quality work outcomes.

The first NCVET project researched higher education in TAFE institutes (Wheelahan et al. 2009). This project researches universities that offer a small number of VET programs and private providers that offer both VET and higher education programs. Both projects followed a similar research design and asked similar questions in order to be able to make comparisons between the two projects; identify

commonalities and differences between mixed-sector universities, TAFE institutes and private providers; and draw general conclusions. Both projects sought to understand the nature and focus of mixed-sector provision; why institutions want to offer both VET and higher education programs; how this provision is perceived by participants, particularly students and teachers; the kinds of pathways to work and further study that are possible; the benefits of this provision, as well as problems with its delivery; and questions about ensuring quality outcomes. This project was shaped by three key questions designed to provide insights into these issues. These are:

- What VET do the public mixed-sector universities offer? Why and how?
- What do mixed-sector private providers look like, what is the nature of their provision and what impact is this having on the VET–higher education sectoral divide?
- What are the general conclusions about the impact of mixed-sector provision on the sectoral divide in tertiary education, and what are the consequences for policy, institutions, teachers and students?

The research included desktop research and semi-structured interviews with 61 people in four states, with most interviews conducted in three states. The number of interviews with the various types of interviewees is outlined in table 1. Interviews with three state VET registering bodies and four private sector stakeholders or their representatives were conducted, and interviews were held in the following nine educational institutions:

- *Four universities that offer a small amount of VET:* two universities were registered as registered training organisations (RTOs) in their own right, and two owned companies that were registered as training organisations (and in one case, as both a registered training organisation and a higher education provider). These included one Group of Eight university, one regional university, another university established before the 1988 Dawkins reforms, and a metropolitan ‘new’ university established after those reforms. Of the latter two universities, one was as a registered training organisation and the other had a subsidiary company.
- *Five private providers registered to offer both VET and higher education:* one was a religious college, one was in the creative arts industries, two were in health (including one in natural health), and the last one was in hospitality and tourism.

Table 1 Categories of interviewee and number interviewed in each category

Category of interviewee	No. interviewed
State VET registering bodies	3
Senior private sector stakeholders/representatives	4
Senior staff at four universities and five private providers	18
Teachers at three universities and five private providers	17
Students at three universities and five private providers	19
Total	61

A fuller explanation of the project methods and its limitations is available in the appendices and this includes more detail on interviewees. The interview schedules used are included in the support documents for this project.

This project adopted the same tripartite classification of institutions used in the earlier project. The three categories of institutions are single-sector, mixed-sector and dual-sector and were created to reflect the extent of institutional differentiation within tertiary education and to avoid over-homogenising non-single-sector institutions. The definition of each is elaborated in the next chapter.

One tertiary education sector?

Pressure on the sectoral divide

The relations between the vocational education and training and higher education sectors were reshaped in Australia during the reforms of the Whitlam Labor Government in the 1970s and the Hawke Labor Government in the 1980s. These reforms resulted in the emergence of two sharply defined sectors, which were characterised by different models of curriculum and different institutional types (mainly universities in higher education and TAFE institutes in VET). The relations between the sectors are once again undergoing realignment as a consequence of economic, social and policy pressures. The emergence of private providers in both VET and higher education has been supported by government policies that encourage competitive markets. Australian governments want to increase the percentage of the population with higher-level qualifications to respond to the needs of the economy and have emphasised pathways between the sectors and the need for a coherent ‘interlinked’ tertiary education sector to facilitate this. These changes are undermining the sectoral divide and contributing to the development of a single reconfigured tertiary education sector and the emergence of new types of tertiary education institutions that offer programs from both the VET and higher education sectors. On the other hand, other government policies, such as the establishment of separate regulators for VET and higher education, are contributing to ongoing sectoral segmentation.

Economic and policy pressures on the sectoral divide

The structure of the economy is important in helping to shape systems of education (Ashton, Sung & Turbin 2000; Hall & Soskice 2001), as is reflected in the difference between the structures of tertiary education in ‘coordinated’ and in ‘liberal’ market economies. Northern European countries are called coordinated market economies because they have highly regulated labour markets and social partnerships between employers, business and labour, which they use to match graduates to jobs in more stable labour markets. Their tertiary education systems have separate VET and higher education sectors and a high level of curricular differentiation. Each sector produces graduates who have different occupational destinations, which in turn have different knowledge bases, and this is reflected in the different curriculum in each sector (Hall & Soskice 2001).

Liberal market economies (such as the United Kingdom, New Zealand, Canada and the United States) have ‘unified’ systems, with two sectors of tertiary education, but less curricular differentiation between them. Institutions in both sectors differentiate by program (for example, an institution may offer higher education, further education, vocational education and adult and basic education programs), not by the sectoral designation of the institution offering it. Their labour markets are less regulated than those in Northern European countries; and both sectors prepare graduates who compete with each other for a range of occupational destinations (often the same ones) within a competitive labour market, and there is more curricular coherence between qualifications in both sectors. Because they must compete with each other, these graduates need similar broad-ranging knowledge and skills to be competitive and to be able to adapt to rapid changes in volatile labour markets.

Australia is a liberal market economy but its tertiary education system is unlike similar liberal market economies, and more akin to Northern European economies. Like Northern European countries, Australia has distinct VET and higher education sectors, each of which has different missions,

purposes and curricula. However, it has not always been like this. The sectoral divide in Australia is a relatively recent phenomenon, which, as Moodie (2010) has shown, is not deeply rooted in Australia's economic structure. TAFE was not established as a national tertiary education sector until after 1974, following the report of the Kangan Committee (Australian Committee on Technical and Further Education 1974). TAFE's designated purpose was to offer both vocational and further education (Goozee 2001). Distinctions between the sectors deepened in the 1970s when the Commonwealth took over responsibility for funding higher education and left responsibility for VET funding with the states. The result was the development of 'distinctive management and administrative practices, as well as distinctive policies regarding tuition fees, staffing and curriculum' (Moodie 2010, p.7). The sharp *curricular* differentiation between qualifications in VET and higher education did not occur until after 1988, when Commonwealth and state governments introduced competency-based training as the basis of a nationally portable system of VET qualifications. Government policies also created competitive markets in education and repositioned TAFE as one provider in a broader VET sector. VET was designed to serve employers' needs for training their employees. This curricular differentiation was enshrined in the Australian Qualifications Framework (AQF), established in 1995, which designated VET qualifications as competency-based (AQF Advisory Board 1995, p.8).

There are two key economic pressures undermining the rationale for the sectoral divide in Australia: the first is the decline in the role of diplomas for entry-level employment; and, the second, Australian governments' objectives to increase the number of people with diplomas and degrees.

Qualifications and entry-level employment

Graduates with diplomas and advanced diplomas are increasingly competing against graduates with university degrees for the same jobs (Foster et al. 2007), and, as Karmel (2010b, p.55) shows, degrees are increasingly becoming the entry-level qualification for many occupations, and that 'those with a diploma are getting pushed down the occupational pecking order'. The rationale for the sectoral divide and strong curricular differentiation between the sectors is undermined if graduates from both sectors are competing for the same jobs and, moreover, not ending up in the specific jobs for which they are trained. (Only about 30% of VET graduates are employed in the jobs associated with their qualifications [NCVER 2010a, table 13].) If they are to compete with each other, graduates need similar knowledge bases and not different knowledge bases, as in systems in Northern Europe and Australia.

The declining usefulness of the diploma for entry-level employment means that TAFE institutes in particular face pressure to diversify to maintain their position in a competitive market. Karmel (2010a) argues that, given the declining role of the diploma, TAFE has no choice but to offer degrees. He argues that TAFE will lose its role as a trainer of upper- and middle-skilled jobs as degrees increasingly become the entry-level qualification. As a result, TAFE will be left as a residual provider of lower-level VET training, trades training, and a feeder for universities. If TAFE offers higher-level qualifications it may be able to 'become a provider of high-quality vocational training across a broad range of professional and sub-professional occupations' (Karmel 2010a). That is, it will continue its traditional role, but do this by offering higher education qualifications.

Increasing qualification levels

The second economic pressure is that Australia, like many other countries, is trying to increase the percentage of its population with higher-level qualifications in response to changes in the economy and society. Karmel (2010b, p.54) claims that there is an 'inexorable trend towards greater proportions of the workforce having formal and higher-level qualifications'. Other Anglophone countries are expanding their higher education systems primarily through their second vocationally

oriented tier of tertiary education (Wheelahan et al. 2009). Further education colleges in the United Kingdom, for example, have a 'special mission' to expand access to higher education through vocationally oriented two-year foundation degrees. Community colleges in 17 states in the United States now offer four-year baccalaureate degrees, as do three provinces in Canada.¹ Polytechnics deliver degrees in New Zealand.

The rationale for this mode of provision is threefold: the vocationally oriented tier of higher education is more applied than universities and can putatively produce graduates who are more work-ready; greater provision by this sector can expand access to higher education for hitherto under-represented groups through more supportive pedagogy (Wheelahan et al. 2009); and provision in the second tier is often funded at a lower rate than the first tier because it is not funded to conduct research. Private education providers make a similar argument for their educational provision. The Australian Council for Private Education and Training (ACPET), the peak representative body of private tertiary education providers (including VET, higher education and mixed-sector providers), says:

A single Australian higher education system, without artificial barriers to course structures and types of providers, should assist [in] addressing needs of these individuals, their potential employers, and the national economy.

Different teaching structures, especially the smaller class sizes and closer tutoring and support, are a feature of many private education providers. These are positioned to contribute to national programs to enhance skills and capacities. (2008, p.5)

The impact of government policy

Official Australian Government policy states a commitment to an 'interconnected' tertiary sector which maintains clear distinctions between VET and higher education (Commonwealth of Australia 2009). Policy is, however, exerting contradictory pressures on the sectoral divide as some policies seek to undermine sectoral distinctions, while others maintain policies and frameworks that give structure to the sectoral divide.

The key government policies undermining the sectoral divide are the creation and expansion of markets in tertiary education. Public and private providers now have to compete with each other for students and for funding. Private providers can access public funding in VET through contestable funding arrangements, and the Commonwealth Government is introducing a 'student-driven' funding system in higher education from 2012. While this funding is only open to public universities,² it is arguably only a matter of time before it is available to other providers, including private providers. Indeed, there are already several exceptions: Commonwealth Supported Places in higher education are provided in the 'national priority' areas of nursing and teaching to seven providers that are not public universities. Five of these are religious institutions and two are TAFE institutes.³ Furthermore, students in private providers in higher education and in high-level full-fee VET qualifications can access income-contingent loans, thus overcoming the initial barrier of having to pay fees at the commencement of their studies.

Other government policies are also helping to reshape the sectoral divide. Skills Australia (2010a, 2010b) has called for growth in the tertiary education sector because Australia needs a more highly

¹ See the Community College Baccalaureate Association (2011).

² And Batchelor Institute of Indigenous Tertiary Education.

³ See Department of Education, Employment and Workplace Relations (2011b). These providers are the University of Notre Dame Australia, Avondale College, Christian Heritage College, Tabor College South Australia, Tabor College Victoria, Holmesglen Institute of TAFE, and now Northern Melbourne Institute of TAFE.

qualified population to meet future economic demands. Australian governments have responded by establishing growth targets. The Victorian and New South Wales governments have designated a public policy role for TAFE to help them meet their expansion, participation and equity targets in higher education (Dow et al. 2010; New South Wales Government 2010). Private providers argue that they also have a role in meeting these targets. The Commonwealth Government (2009) is supporting collaboration between the sectors by encouraging joint bids for funding that will facilitate structural reform.

The Standing Council for Tertiary Education, Skills and Employment⁴ will provide a single forum for policy decisions in tertiary education. The latest version of the AQF, endorsed in 2011, also creates a 'unified' qualifications framework. Qualifications are now distinguished by their level of complexity rather than by the sector in which they are offered. The AQF establishes hierarchies between qualifications, in contrast to the previous 'linked' AQF, which was based on sectorally differentiated qualifications (AQF Council 2009, 2011). All AQF qualifications except the doctorate must also now ensure that graduates have the knowledge and skills they need to progress to the next level in their field. This new requirement will have implications for VET competency-based qualifications as they must now consider educational as well as vocational outcomes. The reforms to the AQF will support greater curricular continuity between qualifications in the two sectors. Moreover, governments are emphasising pathways between the sectors as a key mechanism to support expansion and equity targets. This places the development of pathways at the centre of developing qualifications rather than at the margins (AQF Council 2011).

Dual administrative structures

There are, however, several factors that militate against greater sectoral coherence. The first is that the sectors continue to report to different levels of government and have different reporting, funding, accountability and quality assurance requirements. This has long been a complaint of dual-sector universities (Wheelahan 2000). It is also a key concern for TAFE institutes that offer higher education (Wheelahan et al. 2009). Indeed, the TAFE institutes that offer higher education find this complex reporting process more onerous than the dual-sector universities, as they do not have the same level of infrastructure to support multiple reporting. This complaint has been confirmed in the current study by private providers and universities that offer both VET and higher education. The current complex reporting process constrains the development of mixed-sectoral provision in Australia, as well as in the United Kingdom, where further education colleges offer higher education (Parry 2008; Garrod & Macfarlane 2009).

This is being exacerbated by the creation of two national regulators – one for VET and one for higher education. While the government intends to merge the two regulators in 2013, there are concerns that this may not happen if quality assurance arrangements and agencies become entrenched (TAFE Directors Australia 2010b). An example of the problems that arise from having sectorally differentiated quality assurance and administrative arrangements is the absence of a national register of tertiary institutions that lists both their higher education and VET registration. The National Training Information Service (NTIS) lists the VET qualifications of all institutions, but not their higher education qualifications. Each state lists institutions registered as higher education institutions, but this does not include their VET registration. The only exception is the Victorian Registration and

⁴ The Standing Council for Tertiary Education, Skills and Employment was established on 1 July 2011. It replaced the Ministerial Council for Tertiary Education and Employment which had been in place since April 2009. See <<http://www.ivet.com.au/>>, viewed 21 July 2011.

Qualifications Authority; however, this does not include universities' higher education qualifications because universities are self-accrediting bodies. The lack of a single national register entrenches the separation of quality assurance and the separation of requirements for institutional registration. Institutions are not considered as entities; they are considered through the lens of their respective VET and higher education registration processes.

The tertiary sector, types of institutions and institutional aspirations

The pressures described above are leading to the emergence of a reconfigured tertiary education sector. It is not clear whether the outcome will be one sector, a tertiary education system with interlinked sectors, or two sectors. One element of this reconfigured tertiary sector is the development of new mixed-sector institutions, and these bodies have placed themselves firmly within one tertiary education sector. The higher education in TAFE project used a typology developed by Moodie (2008) to distinguish between different types of providers. They are:

- single-sector institutions: those with more than 97% of their student load enrolled in one sector
- mixed-sector institutions: those with at least 3% but no more than 20% of their student load enrolled in their minority sector
- dual-sector institutions: those with at least 20% but less than 80% of their student load enrolled in each sector.

This typology has been developed to avoid overly homogenising institutions with provision in two sectors. As explained above, dual-sector institutions have dual structures to meet the requirements of both sectors. Mixed-sector institutions, by contrast, do not yet have this infrastructure. The typology was used in this project to distinguish mixed-sector providers from single-sector and dual-sector providers. However, because VET student data are not published by institution, it was not possible to determine which institutions had reached the threshold to enable their categorisation as a single-sector, mixed-sector or dual-sector institution. Consequently, for the purposes of this report, we have called all private providers that offer both VET and higher education and universities that offer a small amount of VET mixed-sector institutions.

Institutional aspiration in mixed-sector institutions plays an important role in reshaping the tertiary education sector. A number of TAFE institutes called for the creation of mixed-sector institutions in their submissions to the 2008 Review of Australian Higher Education (Bradley 2008). They argued for the creation of polytechnics or university colleges that offer programs ranging from senior secondary school up to masters degrees (Box Hill Institute of TAFE 2008; Holmesglen Institute of TAFE 2008). TAFE Directors Australia and Universities Australia (2010, p.1), the peak bodies for TAFE institutes and universities respectively, published a joint paper calling for the tertiary education sector to be defined as incorporating qualifications at diploma level or above. Under this model, tertiary institutions would be defined as 'those which have a broad educational mission and the capacity and capability to deliver a range of tertiary education qualifications'. TAFE Directors Australia later argued for a review of the protocols for higher education to accommodate a wider range of institutions, to include comprehensive universities (including the dual-sector universities); specialist universities; higher education providers authorised to offer qualifications up to masters degrees (and research higher degrees); higher education providers authorised to offer qualifications up to degrees; and tertiary institutes with non-degree offerings (TAFE Directors Australia 2010a, p. 29). The Australian Council for Private Education and Training goes further, arguing for a single *higher education* sector, rather than a tertiary education sector. In contrast to TAFE Directors Australia, the

Australian Council for Private Education and Training (2008, p.3) does not distinguish between different types of tertiary education institutions or designate some qualifications as higher education, and lower-level qualifications as tertiary education:

ACPET recommends a single Australian Higher Education System with an integrated continuum of functions, qualifications and providers, and streamlined administration ...

Most Australians see post-school education as 'higher'. There appears no reason against Australia steering all formal post-school education through one efficient, effective, modern Higher Education system in place of multiple 'sectors', to deliver a matrix of qualifications responding to evolving stakeholder needs.

One argument that both organisations advance is that a single tertiary education sector (even though each would configure it differently) would contribute to institutional diversity. It may do so, but on the other hand, it may result in 'mission creep' and institutional behaviours and models based on the research university (Levin 2004). There are arguments that the amalgamation of colleges of advanced education and universities in Australia post-1988 contributed to institutional homogeneity rather than institutional differentiation (Meek et al. 1996). International experience may be instructive. Levin (2004, p.16) says that 'Baccalaureate degree-granting status for community colleges signifies an end to an identity as a two-year institution'. He claims that 'new regulations, norms and cognitive systems ... are a consequence of baccalaureate programming and of the degree's legal status' (Levin 2004, p.15). Staff recruitment practices emphasise those with higher-level qualifications, requirements for scholarship become important, and institutions may engage in 'imitation based on the need for legitimacy' (Levin 2004, p.17).

There are further problems with the institutional and sectoral models suggested by TAFE Directors Australia and the Australian Council for Private Education and Training. It is not clear that either would result in transitional or relatively stable institutional types. International experiences indicate that government may need to intervene. Fleming and Lee (2009, p.99) describe a process in which three colleges in British Columbia became university colleges and subsequently universities. They report that, while the institutions were subject to complex and competing forces, the extent of mission creep was controlled. This was largely due to the power of government over institutional mandates (Fleming & Lee 2009, p.105). In Victoria, the Melbourne College of Divinity (2011), which is already a self-accrediting institution, has recently been successful in gaining registration as a 'university with a specialised title'.

Arguably, institutional nomenclature is indicative of institutional aspirations. TAFE is changing its 'brand' in Western Australia by designating the state's institutes as polytechnics or institutes (and not TAFE institutes). Many of the TAFE institutes that are higher education providers have formally changed their name, dropped TAFE from their name, or downplay it in their branding (Wheeler et al. 2009). Carey (2011) points to a number of community colleges in the United States that have dropped the word 'community' from their name and argues that this reflects mission creep. Private providers face particular problems in branding their institutions, as Heaney, Ryan and Heaney (2010, p.12) explain: 'They are smaller institutions, and yet they compete at the international, state and institutional level for international students'. They also increasingly compete for domestic students. Private providers and TAFE institutes would gain much in the domestic and international tertiary education market if they could call themselves university colleges or another title that included the word 'university' (Jones & Ryan 2010). The literature has not revealed instances where universities that offer vocational programs seek to change their sectoral designation or remove university from their title.

Scope of mixed-sector provision

As at March 2011, 90 institutions in Australia were registered to offer both higher education and VET qualifications. Twenty-two are self-accrediting institutions: five dual-sector universities; Batchelor Institute of Indigenous Tertiary Education; and 16 are other universities which are either registered training organisations in their own right or have a subsidiary that is a registered training organisation. The rest are non-self-accrediting institutions. Eleven TAFE institutes are registered to offer higher education, and 57 private providers are registered to offer both VET and higher education qualifications.

The project found that the structure of provision is different in mixed-sector private providers, universities with a small amount of VET, and TAFE institutes that offer higher education. Mixed-sector private providers mostly offer higher education and VET in a narrow range of fields of education. This is true even of the big international conglomerates; they tend to have multiple institutions or providers that offer programs in a few fields of education in both sectors rather than construct large-scale comprehensive or multi-disciplinary institutions. Private providers sought to become mixed-sector institutions for a variety of (often overlapping) reasons, including: extending their role as a VET provider to become a higher education provider (and less often, extending their role as a higher education provider to become a VET provider); meeting the needs of their industry or profession; expanding their market; diversifying provision; and realising opportunities to create distinctive forms of provision.

While there are exceptions, universities that offer a small amount of VET also focus on a narrow range of fields of education. These universities offer VET for four main reasons: as an historic legacy; as a consequence of amalgamations; to vertically integrate their provision and provide students with higher-level qualifications; and, to expand their role. This is in contrast to the dual-sector universities with large TAFE and higher education divisions with comprehensive provision in both sectors. Most TAFE institutes that offer higher education are seeking to become polytechnics or university colleges with comprehensive offerings from entry-level VET to higher education qualifications. Consequently, they are seeking to develop comprehensive higher education provision that complements their VET provision.

Types of institutions and provision

It is difficult to determine the number of mixed-sector providers in Australia precisely because there is no national register of providers that lists each institution, their registration as VET and higher education providers, and the programs they offer. The exception is the Victorian Registration and Qualifications Authority, which does so. It does not, however, register self-accrediting institutions such as universities; nor does it report whether an institution is a registered training organisation if it was registered by the (now superseded) VET National Audit and Registration Agency. VET providers and their qualifications are listed on the National Training Information Service, while non-self-accrediting higher education providers and qualifications are listed on each state's register.

Table 2 shows the number of mixed-sector providers in different categories. It includes all mixed-sector institutions.

Further details about the types of providers, their fields of education and scope of provision can be found in appendix 3.

Table 2 Numbers of each type of institution accredited to deliver both VET and higher education⁵

Institution	No.
Dual-sector self-accrediting institutions	6
Other self-accrediting institutions	16
<i>Sub-total self-accrediting institutions</i>	<i>22</i>
Private creative arts colleges	10
Private health colleges	5
Private management colleges	23
Private religious colleges	8
Other private colleges	11
<i>Sub-total private colleges</i>	<i>57</i>
TAFEs	11
Total	90

Source: Compiled from the National Training Information Service website and from state and territory higher education registers (as at March 2011).

Registration and accreditation of qualifications

At present, institutions that wish to offer programs in both sectors must be registered separately as a higher education provider and a VET provider. In many cases, mixed-sector providers are also registered to offer senior secondary school qualifications (particularly TAFE institutes and dual-sector universities) and educational services for overseas students (which includes many mixed-sector private providers as well as universities and TAFE institutes). Institutions must meet the registration requirements for each sector and have their qualifications accredited in each. They must also comply with each sector's regulatory and quality assurance requirements.

Higher education providers are currently registered by their state accrediting bodies. This will soon change, with the national Tertiary Education Quality and Standards Agency (TEQSA) beginning its regulatory functions on 1 January 2012. All higher education providers will have to meet provider standards, the requirements of the Australian Qualifications Framework, and standards for information, teaching and learning and research (*Campus Review* 2011). The current draft provider standards specify the requirements for registration of: universities; university colleges; universities of specialisation; higher education providers; and universities which offer overseas qualifications (Department of Education, Employment and Workplace Relations 2010b).

Non-self-accrediting higher education institutions must get each program they offer accredited separately. Expert panels are convened for this process and they must include, among others, at least one academic with experience in governance and management experience in an Australian university; an academic with disciplinary experience in the field; and an expert in the professional or industry field. Providers must comply with the AQF, and they need to demonstrate that their staff are appropriately qualified (at least one qualification higher than is being taught); that they have sufficient resources (such as libraries); and that they can demonstrate a commitment to, and engagement in, scholarship (Ministerial Council on Education, Employment, Training and Youth Affairs 2007, p.7). While non-self-accrediting higher education institutions develop their own

⁵ There have been slight changes in the number of mixed-sector private providers since the Moodie (2010) discussion paper. James Cook University is no longer registered as a registered training organisation; Challenger Institute of Technology (formerly TAFE) has relinquished its higher education registration, Qantm and SAE have merged (and been incorporated into Navitas), and the South Australian Community Arts Network did not renew its registration as a higher education provider.

qualifications and curriculum, they must demonstrate that their qualifications are comparable with those offered in universities.

The regulatory arrangements for VET are also changing. They will be divided between two statutory bodies: the Australian Skills Quality Authority and the National Skills Standards Council. The Australian Skills Quality Authority (ASQA) commenced operating on 1 July 2011 and has responsibility for regulating the VET sector, registering providers, and accrediting courses that are not already part of national training packages (which contain VET qualifications). The body will cover all states except Victoria and Western Australia, both of which declined to refer their VET regulatory powers to the authority, but they will enact legislation to ensure their processes match those of the authority as closely as possible (Department of Education, Employment and Workplace Relations 2011a). The National Skills Standards Council also commenced on 1 July 2011, and its role is to recommend standards to governments for the registration of VET providers, regulation, quality assurance and accreditation. It will also accredit national training packages (Department of Education, Employment and Workplace Relations 2011a). In other words, the National Skills Standards Council will set standards, while the Australian Skills Quality Authority will implement them. Registered training organisations are required to demonstrate that strategies for training and assessment comply with training packages and are developed in consultation with industry stakeholders, and that their teachers maintain and continue to develop their industry currency and pedagogic skills (National Quality Council 2010).

The Australian Government's policy is to merge the VET and higher education regulators in 2013. However, the Department of Education, Employment and Workplace Relations (2011a) indicates on its website that 'At present, states and territories have not agreed to this merger – there will need to be further negotiations undertaken'. It explains that the development of the two regulators is being undertaken in close consultation, to facilitate a merger 'should it be agreed by all jurisdictions'.

Strengths and areas that need improvement

Universities have well-established processes to ensure the quality of their higher education provision. They are less well equipped to ensure the quality of their VET provision, particularly if they only offer a small amount. Similarly, TAFE institutes can demonstrate compliance with quality requirements for VET provision, but find the registration, accreditation, and quality assurance requirements of higher education onerous (Wheelahan et al. 2009). Private providers are under particular scrutiny because they have high enrolments from international students. This scrutiny has increased due to the recent crisis in the international student market resulting from the actions of a small number of private providers (Baird 2010).

According to audits of non-self-accrediting higher education providers (which include private providers and TAFE institutes), key areas where improvements are needed include institutional and academic governance; scholarship; benchmarking; human resource management; assessment and moderation; facilities and resources; and quality management systems (Ryan & Greig 2010; Winchester 2010). Ryan and Greig (2010, p.4) also report that Australian Universities Quality Agency audits found that some institutions had problems ensuring an appropriate staffing profile, given the nature of the institution and its provision, size and complexity. While Winchester identified many of these issues in a review of the first 20 non-self-accrediting higher education providers, she also reported that the agency audits found some positive results. The audits revealed good practice in student-centred learning approaches, student support, community engagement and the development of a quality culture and quality academic staff.

Perspectives, debates, dilemmas and issues

There are many similarities between the perspectives held by private providers about the challenges they face and those in TAFE institutes that offer higher education. Both argue that their provision is distinguished from universities by its more applied focus, better industry links, and supportive student pedagogy, while at the same time being as rigorous in provision as universities. Both find the separate registration, accreditation, quality assurance and reporting requirements for the VET and higher education sectors to be onerous. Universities with VET felt that VET's sectoral requirements were difficult and they adapted existing university processes for their VET provision. Private providers experienced the divide between publicly and privately funded institutions more keenly than that between the VET and higher education sectors. Audits of non-self-accrediting higher education institutions show that private providers (and TAFE institutes with higher education) need to improve their academic governance and leadership and build cultures of scholarship. Conversely, jurisdictional participants felt that universities with a small amount of VET may not understand the nature of competency-based training and assessment. Private providers tended to compare their provision with universities (as did TAFE institutes with higher education), while universities with some VET used TAFE as the comparator, arguing that their own VET provision was more academically rigorous and better prepared students for studying in university.

VET in universities

The reasons why the four universities included in this project offer VET reflect the range of reasons mentioned in the previous chapter (and appendix 3). Sometimes there was more than one reason why they offered VET and, in one included in this project, this was because new opportunities had emerged over time. In this case, the university had established its registered training organisation so it could develop its own VET qualification and embed this in a degree in a particular field. Entry to the degree was through the VET qualification. It then used its registered training organisation to train its administrative staff and provide them with recognised qualifications. The university augmented the professional-level qualifications it offered in another profession by developing qualifications for assistants and technicians within that professional field. This particular university has strong partnerships with a variety of TAFE institutes, many different types of pathways, and a very high level of commencing students who were admitted on the basis of their VET qualification.

The other universities included in the project were quite different. One provided VET as a consequence of an amalgamation, and it offered VET to the one main industry that dominated its region. This helped the university to meet employer demand for graduates with both VET and higher education qualifications. The university regarded its main competitors as other VET providers. The metropolitan 'new' university included in the project was a registered training organisation in its own right. Offering VET allowed the university to provide pathways into a number of professional degrees (vertical integration), diversify its student population and develop additional funding streams. It has always had strong community links and a social justice ethos, and sees its VET provision as a way of providing pathways for disadvantaged students into higher education as well as helping them to gain qualifications that lead to good occupational destinations. Its VET programs are mainly for domestic students, although it does claim on its website that it customises its qualifications for corporate and

community organisations. The final university had established a separate entity that offers VET and higher education programs principally to corporate clients. It offers ‘whole of enterprise’ provision and provides pathways from entry-level vocational programs to masters degrees. Even though it is a separate company, it strongly identifies with the university, and its mission is to enhance the university’s capacity to build corporate partnerships.

With the exception of the last-mentioned university, VET did not have a high public profile in the other universities in their corporate publications. The first two universities did not mention their VET organisational unit or VET provision in their 2009 annual report. The third university described the organisational location of its VET unit and associated matters in its annual report, but did not report on its activities or outcomes. While VET provision in these universities was highly valued by senior management, who saw it as fulfilling particular purposes, it is clear that VET is not intrinsic to their role as universities and that they are not on a trajectory to becoming dual-sector providers. The university with the corporate training company featured the company in the university’s annual report and its director was a member of the university’s executive.

The heads of VET units and programs interviewed from universities were responsible for a range of tasks, including winning training contracts; attracting students; engaging and scheduling teachers and other staff; ensuring that programs met regulatory and other quality assurance requirements; and managing their programs and units. Their biggest concern was maintaining the financial viability of their programs and units, which meant that governments’ different financial treatment of public and private VET providers was a substantial issue for them. Program heads commented on the anomaly of a private VET unit within a public university, which complicated their job. Some university VET program heads also commented on the relations between VET and higher education in their university, believing that VET is not valued as highly in their institution. One noted that, although pathways were a priority in policy, this had not resulted in good pathways. In addition, VET is not well understood within their university, making program approval, staffing, class timetabling and, in some cases, students’ work experience more difficult to arrange than for higher education students.

Program heads did not report that VET programs were compromised by being in a university, but that they were more difficult to organise. It seemed that program heads had to adapt the university’s academic calendar, student administration and other systems that had been established to serve only higher education to incorporate the needs of VET. However, in one university’s registered training organisation, VET students were not enrolled on the university’s computerised administration system and enrolment and other student information was handled in paper form, creating many frustrations. In the higher education in TAFE project we reported that, where an institution had a tiny proportion of load in one sector with the majority of its load in the other sector, the institution lacked the institutionalised frameworks to support the reporting and accountability requirements of the smaller sector. This finding was reinforced in this project.

Mixed-sector provision in private providers

All the private institutions included in this project had education and training as their purpose even if they were part of a broader corporation (in contrast to companies that are registered to train their own staff to support their main business, which may be, for example, to produce and sell cars). The reasons why private providers in this project wanted to offer VET and higher education were complex and often overlapping. For some it was a way of moving beyond being a VET provider and expanding their market. One private sector representative explained that becoming a higher education provider was a natural progression for existing institutions that were ‘delivering premium programs at the

higher end' of VET. They were already offering VET diplomas and advanced diplomas and found they had more scope when offering these as higher education qualifications. Interviewees (including the state jurisdictions and private sector representatives) emphasised the business opportunities that became available because the service offered by private providers is different from universities and TAFE institutes. Institutional leaders and teachers claimed that developing their provision contributed to diversity and choice. Several providers said that they were able to provide programs for students who otherwise would not have gone to university and, at the same time, ensure high outcomes, which included a good job, or progress to higher-level qualifications.

Others found that they needed to offer programs in both sectors to meet industry needs (and expand their market). The practical and applied focus of their qualifications and their capacity to offer pathways between qualifications meant that providers could produce graduates who had practical skills as well as the level of knowledge and skills that come with having a degree. An institutional leader from the hospitality provider said that 'The system forces you to be mixed-sector – if you want to deliver skills you have to become a VET provider. If you want to allow your students to progress, you have to become a higher education provider'. Another explained that the market was 'screaming out' for integrated VET and higher education qualifications.

An institutional leader from the natural medicine provider explained that their profession was traditionally VET-based; 'however, the community began to demand degrees from practitioners just as they do from other health care providers'. They explained that their 'professional associations wanted their practitioners to have parity of status with Western/traditional medical providers'. Students wanted to undertake a degree and not a diploma or advanced diploma. This was particularly the case with school leavers, who now were 20% of their intake, which is a shift away from their 'traditional' students, who were mainly mid-career changers. Those involved in the creative and performing arts said that getting into higher education gave them more flexibility and allowed them to build their industry through the quality of their graduates. They could offer the programs the industry needed at the level required. It also allowed them to build better partnerships with universities. Some said they had had both good and bad experiences in partnering with universities, but the less successful partnerships had provided an impetus for them to develop their own programs.

One key finding from this research is the extent to which private sector representatives and private providers included in this project objected to training packages and competency-based training in VET. They said that an important reason (among others) for private providers wanting to offer higher education qualifications was to escape from training packages. This was the unequivocal and emphatic view of all of the private provider representatives interviewed, with many institutional leaders making the same claim. They offered higher education diplomas and advanced diplomas, not because they are at a higher level than VET qualifications, but as a substitute for VET diplomas and advanced diplomas, which they find too restrictive.

One private sector leader said that training packages 'dumbed down' qualifications, and did not give providers the flexibility they needed to develop their own tailored qualifications. The private sector leader provided an example of a provider with a 'great diploma' but the only way they could protect their intellectual property was to develop it into a higher education qualification. He said that premium providers were moving out of training packages and into higher education.

On the other hand, private provider teachers did not seem so concerned about competency-based training. One thought that training packages were a hindrance and that audits focused on procedural issues rather than on the quality of teaching and academic quality. One teacher taught only in higher

education and did not know much about VET, but the others made no mention of competency-based training. They did, however, strongly support VET's skills orientation.

Overall, the reasons given by private providers for offering mixed-sector provision were, with one exception, similar to the TAFE participants in the higher education in TAFE project. In that project TAFE teachers were generally hostile to training packages and competency-based training. However, we interviewed fewer private sector and university VET teachers in this project (17) compared with teachers in the higher education in TAFE project (27). This is an issue that should be explored in further research with teachers in all types of mixed-sector institutions.

Most of the heads of vocational programs interviewed in private colleges were responsible for supervising teachers, ensuring that training packages were delivered properly, that assessment was conducted appropriately and that the program met the audit requirements of the Australian Quality Training Framework (AQTF). While they were aware of the need for their program and unit to be financially viable, the college had marketing, student recruitment and staffing systems that shared responsibility for maintaining the program's viability. In addition, some of the larger colleges had a middle manager who was responsible for the accreditation, credit transfer and pathways agreements for all programs, and perhaps another who was responsible for ensuring that programs met regulatory requirements. Again, this spread the responsibility for ensuring that programs met regulatory requirements.

How mixed-sector provision differs between providers

The explanations offered by private providers for why their provision was different from that offered at universities or TAFE institutes were similar to those given by participants in the higher education in TAFE project. The private providers said they could offer personalised, applied and experiential learning; student-centred pedagogy; smaller classes and more time in class; strong tutorial support; and extensive industry contacts – which helps students get jobs. Their qualifications were rigorous, and they offered graduates and employers a blend of the theoretical and practical. Their teachers are industry experts, with many having their primary jobs in industry, with one teacher claiming that this is 'much better than uni where people never get out of the classroom'.

Most comparisons made by interviewees in private providers seemed to be with universities and less so with TAFE institutes (although there were some). One teacher said that at their college it was 'all about people. There is no room for brilliant academics with no people skills'. Another said: 'Lecturers here are young and full of energy – not 50 plus like at some universities'. They said they were less elitist than universities. Teachers in private providers argued that the learning experiences they are able to offer students set them apart from higher education teaching practices at universities. One teacher explained 'we make people job-ready and give them applied skills all the way'. Teachers argued that the applied focus is a better pedagogic strategy and results in the employment of their graduates, similar sentiments to those expressed by teachers in the higher education in TAFE project. Overall, universities were viewed as elitist, not necessarily concerned with issues of teaching and learning, with academics having little time to focus on the individual needs of students. These points can of course be debated, but this was the consistent storyline from teachers and most other private provider interviewees.

One interviewee from the jurisdictions said that private providers were more able to offer boutique or niche programs compared with the large public providers in either sector. A private sector representative said that private providers had to be entrepreneurial and responsive because they

were a business. He argued that the potential for coherent pathways from VET to higher education, based on a high level of knowledge of what each was doing, meant that pathways could maximise credit and support students: 'there is no block credit or guessing what someone has done – they know and have integrated the prior studies'. Moreover, he argued that one difference between them and public providers was that, because students had to pay high fees, they expected a high standard of provision. In contrast, a teacher thought that universities had the advantage of being able to offer students vast resources, but not the same level of access or support.

Some differences arose because of the nature of the institution and its purpose. For example, at the religious college a teacher explained that the college had a distinctive Christian philosophy: 'everything we teach we bring back to that and being ethically sound'. It was argued that they get to know students and build real relationships.

University interviewees were asked to contrast their VET provision with that offered in TAFE institutes or in other VET providers. Most focused on the differences between TAFE institutes. Participants said that one advantage was that their VET students got a qualification from the university and not TAFE and had access to better facilities than at TAFE. They generally taught higher-level VET qualifications and their staff also tended to have higher qualifications. (One deputy vice-chancellor said their VET teachers had to be higher education graduates, and staff would be encouraged to undertake the graduate certificate in higher education.) Because they were in a university and because they emphasised pathways, they had a stronger focus on educational content and were able to develop students' study skills to a greater extent and better prepare them for university. As one university leader offering VET explained:

The university's vocational programs have much stronger educational preparation than those of single-sector vocational education providers. [We] have stronger teaching methods, student learning and assessment. The university's emphasis is on higher-level vocational programs in contrast to TAFEs, which have concentrated on certificates I, II and III, apprenticeships and trainees.

Equity was also an important issue. Universities claimed to be able to give students a 'taste' of university and support them in making the transition. The smaller scale of their VET provision meant that they were more flexible, their classes were small and they could get to know their students really well. One university leader said that their VET students may:

have images of what university can be like and we spend a lot of time demystifying university, while still making explicit the different requirements of vocational and higher education assessment.

The university registered training organisation which was focused on corporate clients said they could customise their programs to the organisational needs of their clients, and that their 'strength was in design and delivery'. This shaped both their higher education and VET provision and made it different from that offered by the university because it was designed to meet corporate needs. However, they do not see themselves as separate from the university: 'we are the university', and they see their role as an extension of what the university does. They tailored their program for the industry and the assessment was targeted to and integrated in the business. Their different model meant they could offer high levels of student support and thus had 'outstanding' completion rates. One explained: 'If the company has invested a lot of money, they don't want students to drop out after a week'. Because they focused on corporate clients, they were able to draw on the 'best' facilitators and were able to be flexible in staffing and pay.

VET–higher education divide and public–private divide

The project interviews explored participants' perceptions of the divide between the VET and higher education sectors and between public and private providers. They also explored participants' views on the extent to which these boundaries should be maintained.

Even though all interviewees acknowledged that the divide between VET and higher education was blurring, there were some who thought that this was undesirable. Two of the three interviewees in state jurisdictions felt that the blurring of the sectoral divide would result in the dilution of VET's skills focus and a concomitant diminution in standards in universities and in their capacity to undertake research. They argued that each sector had its own strengths. These views are markedly different from the views expressed by those in state offices of higher education in the higher education in TAFE project, who generally welcomed the blurring of the sectoral divide and thought it would contribute to institutional diversity. The jurisdictional interviewees in this project had specific responsibility for VET.

This view was also expressed by some senior participants, including a deputy vice-chancellor and a senior private sector representative. (The latter thought that TAFE institutes will try to become like universities and that the requirement for skilling and respect for 'tradies' will be lost.) Another senior private provider leader argued that universities should not offer VET because they did not do it very well. Some of the teachers above distinguished between VET and higher education provision, but saw that they were complementary within the institution. The main differences were curriculum, assessment and skills orientation.

Several of the university leaders thought that academics didn't really understand VET. For example, one university leader who was a strong champion of VET said there was still resistance among staff. Several teachers thought that there were status differences between VET and higher education within the university. Similar views were expressed by interviewees from private providers, but to a lesser extent.

On the other hand, in relation to the divide between the public and private sectors, a number of interviewees held extremely strong views. VET staff in universities were concerned by the anomaly of working for privately funded VET within a public university, while many private sector leaders argued strongly for access to public higher education funding, while acknowledging that there was increasing access to public VET funding. They argued that the absence of public funding put them at a competitive disadvantage to public providers in both sectors and constrained competition and institutional differentiation. They also claimed that it was inequitable because their students generally were 'second-chance' students who did not come from privileged backgrounds, and they had to pay much higher fees. This argument was also made by TAFE institutes in the higher education in TAFE project because they are also unable to access public higher education funding (with a couple of exceptions).

One private sector representative argued that universities should not receive public funding to offer VET; he thought universities that offered VET were primarily interested in making money rather than becoming a VET provider. He also argued that TAFE institutes should not receive public funding to offer higher education, as their publicly funded purpose was to deliver VET. By contrast, in the higher education in TAFE project, TAFE leaders argued that they were required by government policy to compete in a market and if they did not, their public provision would suffer because they would lose students to private providers. They also argued that private providers who accessed public VET

funding were at a competitive advantage because they did not have the same community service obligations or requirements to deliver expensive programs.

Dilemmas and debates about regulation and quality

The private sector representatives and institutional leaders raised concerns identical to those raised by TAFE participants in the higher education in TAFE project vis-a-vis the difficulty of meeting two different sets of regulatory, quality assurance, funding, reporting and registration and accreditation requirements. Only one private sector leader said there was no problem in principle in meeting two sets of requirements, even though he thought the amount of regulation was onerous.

In speaking about regulation in both sectors, one private provider leader explained that ‘regulation as a private provider is overly onerous and it still doesn’t stop poor practice. The costs associated with the raft of reporting are also onerous’. The private providers also argued that because they are externally accredited they have to meet standards more rigorous than those at universities. (This argument was also made by TAFE institutes.) One private provider leader argued: ‘Bring on TEQSA – we are not scared of scrutiny, we’ve been through it; many public institutions, however, have only internal scrutiny’. A jurisdictional representative thought private providers had a point:

All the requirements are that private providers have to mirror university requirements, but they are implemented in different circumstances. Private RTOs argue that they have to meet higher standards than universities. The regulatory framework – the AQF, the protocols, the ... guidelines – these are rigorous standards and they are audited in ways that universities don’t have to be.

Another argued that the requirement for private providers to offer degrees equivalent to universities stifled innovation, particularly since their aim was to develop distinctive programs, while putting academics from universities from the same discipline as theirs on registration and accreditation panels was seen by private providers as a conflict of interest. They said that many academics were inherently conservative and some just did not like the idea of higher education not being delivered in a university. The private sector leaders were dismayed about the establishment of two national regulators – one for higher education and one for VET, and believed that an opportunity for change was being lost.

Universities with VET also complained about the different regulatory requirements for both sectors. All university managers commented on the onerous requirements for approving VET programs and meeting the requirements of the Australian Quality Training Framework. One said ‘VET’s requirements are just mad’. Another that the ‘VET bureaucracy is ridiculous’ and it required their vocational unit to carry enormous overheads. While other mixed-sector providers argue this, external accreditation requirements may also seem particularly irksome for managers in universities because, as self-accrediting higher education institutions, they are not required to gain external accreditation of their higher education programs.

Higher education scholarship and academic governance, VET industry currency and competency-based assessment

Overall, while TAFE institutes and private providers have identical concerns about regulation and quality assurance in higher education and the onerous burden of meeting the requirements of two sectors, there are also many similarities between them in the challenges they face in developing scholarly cultures and building strong academic governance arrangements. The jurisdictional

interviewee cited above who was very sympathetic to private providers and TAFE institutes that offer higher education said that:

Some private VET providers struggle to make the transition to higher education ... They are primarily VET and they don't understand that their assessment is different to higher education. They put a lot of VET courses into higher education courses, and they don't put money into higher education.

The interviewees from the offices of higher education cited in the higher education in TAFE project argued that it takes time to develop the appropriate cultures, institutional governance, and policy frameworks to achieve the desired standards. This is reflected in the Australian Universities Quality Agency audit reports that are available for four of the five private institutions in this project. One institution received a glowing report from the agency; in its submission the institution had said that part of its self-improvement plan was to strengthen its academic governance. The Australian Universities Quality Agency supported this and provided a number of other recommendations to build on what was a very good institutional framework overall. In relation to the other institutions, while the agency found many positive features, particularly in the level of pastoral care and institutions' relationships with students, there were recommendations for strengthening academic governance and academic leadership, although they varied in how substantial and far-reaching they were.

Jurisdictions were asked about the challenges facing universities with a small amount of VET. Two of the three were worried that universities may have an overly academic focus. One said that a challenge for universities is that, while their 'provision of vocational education seems rigorous', their approach to assessment was similar to that in used in schools rather than that required for competency-based training. The other thought that people in universities:

think they know about assessment because they have a PhD, and they have to learn about competency-based assessment. They don't like doing that ... the problem is in delivering and assessing the competency.

This interviewee worried that universities 'didn't seem to be as engaged with industry or employ teachers who have extensive experience in practice'. On the other hand, this person considered that mixed-sector private providers were in a different position because they are niche providers and needed to have people who understood both VET and higher education requirements. The third jurisdictional interviewee believed that private providers had more trouble than TAFE in maintaining their staff's industry currency because they are very small and find it difficult to release staff for this purpose.

Institutional, teacher and student identities

Private providers in this project tended to see their institutions as ‘high end’ tertiary education institutions rather than as VET or higher education institutions, although one provider had ambitions to become a university. Universities that offer a small amount of VET were unquestionably identifying as universities rather than as dual-sector or mixed-sector providers. Teachers generally identified with their discipline or as teachers. Students glossed over whether they were studying a VET or higher education program, or whether they were studying in a private institution or a ‘university’ when explaining their studies to others. Concerns with status took a somewhat different form in this project compared with the higher education in TAFE project. In the latter, the VET–higher education divide was continually and explicitly invoked. Concerns about status were addressed more obliquely in this project: interviewees compared their provision with that in universities to demonstrate the academic rigour of their qualifications on the one hand, but their more applied focus on the other. There was less overt discussion of the sectoral divide, unless interviewees were referring to the divide between the public and private sector.

Institutional identities

In the higher education in TAFE project, three of the six TAFE institutes in the project saw their trajectory as becoming a polytechnic, while the other three viewed offering higher education as an extension of their role as a VET provider. The move towards designating TAFE institutes as ‘tertiary education institutions’ has gathered pace since that project: only two of the ten TAFE institutes in Western Australia include TAFE as part of their name, and many other TAFE institutes in other states have either dropped TAFE from their name by getting government approval to do so, or have done so without approval. TAFE Directors Australia (2011) has been very active in policy debates arguing for new categories of tertiary education institutions. The general trajectory for TAFE institutes that wish to become comprehensive tertiary education institutes (or polytechnics or university colleges) is to develop higher education provision that matches their VET provision.

Similarly, the Australian Council of Private Education and Training (2008) has been active in support of a single higher education sector, in which they include all post-school providers. The private providers saw their future as becoming ‘tertiary education’ institutions, although the religious college in this project had aspirations to become a university and it predominately offers higher education. The other private providers included in this project see their institutions as ‘high end’ tertiary education providers. Rather than define their institutions as aspirant universities, they focused on their field of practice and the way they could provide integrated provision that incorporated the best of both sectors, while overcoming problems they associated with each (training packages in VET and the elitism and overly academic focus of universities). Their focus on only a narrow range of fields of education encourages this approach, as they specialise in preparing students for particular fields of practice. However, private providers’ institutional aspirations may change should a broader range of institutions win the right to include the term ‘university’ in their titles. They will come under pressure if the term ‘university’ becomes more widespread and institutions are able to use it as part of their marketing.

The universities in this project that offer a small amount of VET had no aspirations to become mixed-sector or dual-sector providers. As explained earlier, their reasons for offering VET were related to supporting their roles as universities, and the small scale of their VET provision means that it will be a marginal concern within the university, even if it does have the support of senior management. However, some universities wish to become dual-sector institutions, such as Central Queensland University, and while it is no means assured, it is possible that the University of Canberra and Canberra Institute of Technology will become a dual-sector university (McDonald 2011). Becoming a dual-sector university will provide the higher education and VET components with sufficient economies of scale to ensure viability in the increasingly competitive tertiary education market. After the merger, the new institutions will have new identities; however, their identities will be underpinned by their designation as *universities*. It is not likely that any new dual-sector institution will seek to relinquish its sectoral designation as a university as a consequence of the hierarchical structure of tertiary education in Australia.

Teacher identities

We interviewed 17 teachers, six of whom worked in universities. Of the latter, three taught in VET only, and three taught in higher education and VET programs. Two teachers from one university who taught in both higher education and VET were principally teaching in a university degree which encompassed elements of the VET program. For their teaching staff, other VET programs offered by the university's training company drew, to a greater extent, on casuals and those working in the industry. Of the 11 private provider teachers, five taught in higher education, one taught in VET only and five taught in both VET and higher education.

The interviews showed that the teachers had varied perspectives on their professional identity. When asked how they describe their job, those who worked in the private sector aligned their work with their particular discipline, such as 'natural therapy' or 'musician'. This identification with their field of practice was particularly strong and also reflects their institution's provision, which is mainly restricted to that field of practice. However, teachers in the universities and TAFE institutes referred to themselves as teachers, educators, or tertiary educators, but they also demonstrated a level of ambivalence about their professional identities as teachers and the type of institution they work in. Two VET teachers used the term 'lecturer', one specifying that there is 'no real difference between a lecturer and an educator – some say it's about pay rates'; another distinguished their work by adding 'I am a lecturer at a college'. One said 'I am a teacher with a love of research'. Only one person identified as an academic, adding that 'I work in academia in the private sector'. The following comment from a teacher captures the dilemma for some who teach in the private sector:

But we are never quite sure what to call ourselves. To call ourselves an academic means we work in a university and we don't do that. Maybe I call myself a tutor or teacher [but that] means I work in VET ... I feel a bit schizophrenic because of the different responsibilities as teacher, administrator ... [their original occupation] and curriculum developer.

The ambivalence shown by the private provider teachers in describing what they do contrasts with teachers in the higher education in TAFE project who were not at all ambivalent about their identities – they described themselves as *higher education* teachers or academics. Similarly, those teaching VET in universities also identified with their discipline or as teachers and their comments had no hint of the dilemmas that some private provider teachers had about their identity. The teachers identified as *university* teachers, with the exception of one who said that she 'never knows how to describe it!'

While the teachers may differ in how they define themselves within their institution, they mostly agreed on the nature of their work and in this they expressed similar views to their managers and directors. Their work was to teach in programs that incorporated both theory and practice. That is, the curriculum defines their work in the way they understand their job, which is to begin with practical applications that lead to the incorporation of theoretical perspectives in the later years of the degree. This theory–practice approach as a defining feature of teaching is similar to the teachers in the higher education in TAFE project.

A few of the teachers raised concerns about the lack of professional development available to them. Most of the teachers interviewed had extensive industry experience and had maintained strong industry links. However, some of those interviewed discussed the lack of opportunity to develop their teaching and learning skills. Particular concerns were how to deliver effective lectures, design curriculum and assess students' work. Only four of the teachers interviewed positioned themselves as researchers as well as teachers; two of these were principally teaching in the university's degree that incorporated the VET program, and the other two were at the private religious institution that had aspirations to become a university.

Scholarship and research featured prominently in the comments of the higher education in TAFE project, but there was an absence of such commentary from the teachers we interviewed for this project, with the four exceptions noted above. This may be because the teachers identified more strongly as teachers than as teachers and researchers. Twelve of the teachers interviewed indicated that they would like to remain in teaching. Two mentioned that they would like to be involved in research, and one indicated that they would pursue a PhD. One claimed that he would leave as there were too few opportunities in his current position, and one indicated that his employment depended on whether he was offered a contract. Perhaps the scholarship of teaching and developing as researchers is not as important to the teachers interviewed, as they view having currency within their particular specialisation as more relevant – and this is the expertise they bring to their work. Nonetheless, this is a challenge for these institutions, since the higher education registration requirements insist that higher education teachers in non-self-accrediting institutions engage in scholarship, and those who teach research students must also engage in research (Wheelahan et al. 2009, p.19).

Student identities

VET students interviewed at universities identified strongly with the industry they were preparing to enter and with their university or campus. They identified as 'business' or 'university' students rather than as VET students. Away from the classroom, VET students interacted most with other students in their class and with their teachers. Most interacted only incidentally with students of other programs. VET students who knew higher education students said they did not think of them as different types of students. Most of these students were broadly aware of the higher education programs offered by their university and were vaguely aware of opportunities to transfer or progress to those programs. Some students were enrolled in a VET program with a strong pathway to a related higher education program and these students were aware of the opportunities for progression to it.

One student enrolled in a VET program offered by a university explained that they were asked by their fellow students to report their dissatisfaction with their program to the research team. The student reported that the timetable was changed frequently, often at short notice; teachers did not turn up at scheduled times; some classes dealt with material that had been covered previously; and other subjects or perhaps classes seemed irrelevant to the vocational program. In addition, the

program was disorganised. However, the student said that the teaching facilities and resources were excellent and that most of their teachers were very good. This view was expressed by other VET students at universities. Similar issues were raised by students about different private providers, ranging from the need to ensure administration was more organised, to ensuring that course guidelines were adhered to and notice was provided for cancellations. Timetabling, the timing and pacing of assessments, group work (for and against) and facilities were also issues, as they had been in the higher education in TAFE project. At one private provider two students argued separately that the academic standards needed to be more demanding, particularly in requiring students to write essays and develop their communication skills, with one saying that ‘It is not up to the same scratch as other universities’.

Students interviewed at private colleges also identified strongly with their industry and college. They had a clear idea of the occupation they were preparing for and many identified with that occupation. They were more aware of opportunities to progress within their occupation than with opportunities to progress educationally. All students interviewed believed that their college was of high quality and that their program was preparing them well for their industry. They particularly valued their program’s links with and relevance to industry. Most students were pleased with their college’s distinctive approach.

There were, however, some indications that, when explaining their studies to others, students glossed over whether they were studying a VET or higher education program, or whether they were studying in a private institution or a ‘university’. This may reflect their very strong identification with the industry they were preparing to enter, but it could also indicate some uncertainty about their identities as students. In the higher education in TAFE project students’ identities were strongly shaped by their sectoral designation; they were *higher education* students, although many were not so forthcoming about telling *where* they studied, with many either avoiding telling people where they studied, or telling them they were at uni.

The same results were found in this project. When we asked students what they told people about their studies, only one student unambiguously said they told people they were studying at the specific institution, and then named their qualification. Others named their qualification or their intended occupation or said they were going to university or explained the activities they were engaged in. One student at a private institution said ‘I refer to the content rather than where I am studying’. One said that at her institution the VET students described themselves as going to school and higher education students described themselves as going to college, whereas she considered her institution to be a private university. We asked teachers how students referred to their studies and most said that students either said they were going to uni (‘you hear it in the café all the time’) or by their intended occupation. One teacher said ‘Their status updates on Facebook are often “going to uni”, so they see [specific institution] as uni, and themselves as uni students because it is sold in that way, as they are getting a bachelor degree’.

Overall, while private provider students are as happy with their studies as they were in the higher education in TAFE project, they have the same concerns about the perception of the type of institution they attend, glossing over the type of institution they attended, whereas they would have been less likely to do so had they been studying at a university. The need to support higher education students in these institutions and ensure they experience a ‘higher education’ student experience is the same as in TAFE institutes. The difference is that TAFE institutes are generally larger institutions and are developing higher education provision to match their comprehensive VET provision, which will (over time) provide them with greater economies of scale. Most of the private providers in this study

will need to focus on developing higher education cultures within specialist institutions, and the challenges in developing these cultures are less well thought through. VET students at universities and in mixed-sector private providers didn't necessarily identify as VET students either, although those at universities identified themselves as at university. Challenges remain for these institutions in ensuring their VET students develop the practical skills that will allow them to get work in their chosen occupation, as well as progress to higher studies, which seems to be a key objective of institutional leaders at both universities and private providers.

Discussion and conclusion

The divide between the VET and higher education sectors is being reworked at the same time as that between publicly and privately funded institutions. The emerging marketised tertiary education sector is resulting in greater institutional diversity, but also in more stratification. Mixed-sector and dual-sector institutions are likely to become more important within tertiary education in Australia, but they face specific challenges in ensuring the quality of their provision. If governments wish to support this provision, then they will need to give consideration to how this can be achieved. Specific suggestions were made in the report *Higher education in TAFE* (Wheelahan et al. 2009) about supporting provision in mixed-sector TAFE institutes. In this report, however, we suggest that mixed-sector provision more broadly can be supported through more streamlined regulation of the sectors; structuring tertiary education so that differences between sectors and institutions are qualitative rather than categorical; more attention to articulation and pathways; the introduction of a national register of tertiary education and a single statistical collection; and the establishment of a national framework for the development of scholarship in mixed-sector teaching and learning institutions.

Sectoral boundaries and the place of mixed-sector institutions

Moodie (2010) argued that the divide between the VET and higher education sectors was more important in the public sector than in the private, and that the more important issue for the private sector was the disparity between public and private institutions. This is because governments fund TAFE institutes and universities to offer VET and higher education respectively and they establish distinct management practices for each sector. Governments also have more scope for shaping what universities and TAFE institutes should do because they fund them. Governments argue that VET and higher education have different missions: VET's role is to train people for work, whereas higher education has a broader role in knowledge creation and in training people for the professions. The Bradley Review (2008) argued that Australia needed an interlinked tertiary education sector, where VET and higher education fulfilled these different roles. By contrast, the private sector is different because it is not publicly funded, and governments cannot insist that private institutions conform to each sector's designated role. They are not owned by government (as TAFE institutes are), and they are not established by state government acts of parliament, which specify the role and purpose of universities.⁶ Consequently, the 'distinct mission' of each sector is less important in structuring what they do, except to the extent that they interact with government and comply with sectoral requirements to offer qualifications or access funding. The result is that, while TAFE institutes and universities are often accused of going beyond their sector's mission (TAFE gets accused of mission creep and universities get accused of encroaching on VET's territory), there is no such charge made against private providers. Private providers are businesses and it is up to them to choose whether they will become a VET or a higher education institution (or both).

Overall, this hypothesis was confirmed, but with some nuances. The sectoral divide *within* the mixed-sector universities in this project was expressed, but not as strongly as it was in the dual-sector universities or in the TAFE institutes providing higher education. However, implicit in the commentary

⁶ Bond University and Notre Dame University are private universities, and each has an Act of parliament that establishes it as a university, but they are only two of 39 universities in Australia. Overall, universities have more independence from government than do TAFE institutes, but the fact that public universities receive government funding means they must also meet government policy objectives.

from some university participants relating to the distinctiveness of their VET provision was that their provision was closer to the ‘gold standard’⁷ of higher education in their university compared with VET provision offered elsewhere. The higher education in TAFE project indicated that sectoral distinctions and cultural hierarchies were beginning to emerge in TAFE institutes that offered higher education. These are public institutions and these views are consistent with the hypothesis above, that the sectoral divide will be felt more keenly in these institutions.

These sectoral tensions were less important in the private mixed-sector providers, although they were still there. However, they were not ‘front and centre’ of consciousness as they were for the teachers and institutional leaders in the higher education in TAFE project. The private providers in this project differentiated their programs from those in universities by pointing to their advantages, while at the same time arguing that universities were elitist and unresponsive – partly because they were assured of their position in the hierarchy. This is identical to those of senior managers and teachers in the higher education in TAFE project. It wasn’t just that universities were publicly funded and private providers’ higher education provision was not; rather, it was differences in the nature of provision itself that was also a distinguishing feature.

While the relationships between public VET and higher education providers are structured by the sectoral boundaries, these occur within a marketised *tertiary* education system, and this system also structures relations between mixed-sector private providers and public providers, particularly universities. Institutional hierarchies are present and arise from the competition for students and funding (Marginson 1997). Universities are more highly positioned in this market, and they, in turn, are also differentiated, as evidenced by the distinction between ‘selecting’ and ‘recruiting’ universities. The proliferation of various rankings also shows the importance of universities’ relative position compared with each other.

A key conclusion from the project is therefore that one tertiary education sector is emerging and it is broader and much more differentiated, encompassing, as it does, different types of institutions. However, it is also hierarchical and stratified, such that private providers and TAFE institutes position their institutions and programs by their relationship to universities.

How can policy support mixed-sector institutions?

Another key conclusion we can draw from this project is that the increased economic and social demand for graduates with higher-level qualifications, and government policy and market settings, will contribute to: the blurring of the sectoral divide, the emergence of a single tertiary education sector and the growth of mixed-sector institutions. Mixed-sector institutions will play an important role in opening access to educational pathways and higher-level education for disadvantaged students, and diverse institutions may offer distinctive educational opportunities, particularly in niche and specialised areas. Given this is the case, considered approaches are required to guarantee the quality of this provision and to ensure that students experience good outcomes. We outline some policy responses below that are likely to promote a more coherent and manageable national tertiary education system.

⁷ The researchers in this project do not think that universities’ provision is gold standard; we are using this phrase to show how participants in this project used higher education offered in universities as the standard to compare other forms of provision.

More streamlined regulation of the sectors

As with the higher education in TAFE project, this project found that the main barriers to developing and expanding mixed-sector institutions are the onerous requirements for meeting the quality assurance, regulation, and registration and accreditation requirements of two sectors. While there was general agreement that certain sectoral distinctions were important, particularly those of pedagogy and learning outcomes, universities and private providers in this project and TAFE institutes in the earlier project felt strongly that reporting requirements could be streamlined. Current Commonwealth Government (2009) policy is that the Australian Skills Quality Authority and the Tertiary Education Quality and Standards Agency will merge in 2013. Even if this merger is delayed beyond 2013, both regulators will need to work together under the guidance of the Standing Council for Tertiary Education, Skills and Employment to develop more coherent regulation relating to the registration, accreditation, and quality assurance requirements of institutions in both sectors. The new unified Australian Qualifications Framework should be used as the basis for a less fractured approach to pathways between, and within, tertiary education institutions and sectors.

Qualitative differences between the sectors rather than categorical

We found that the sharp difference between VET and higher education in Australia is more aligned to the coordinated market economies of Northern Europe than to Australia's liberal market economy. This inconsistency is being heightened as both VET and higher education become increasingly marketised, and this is driving convergence between Australia's system and that of the other liberal market economies such as New Zealand, Canada, the UK and the US. Like these other countries, VET and higher education institutions are competing with each other, not only within each sector, but also across the sectors. Their students are competing with each other for the same jobs and require similar knowledge and skills to do so. VET students need pathways to higher education to gain degrees, since occupations that previously required diplomas as entry-level qualifications now require degrees. Yet, as government market policies are creating one tertiary education market, government financing, reporting, quality assurance and other policies are maintaining organisational differences between the two sectors. In other liberal market economies the differences between the sectors are not categorical (fundamentally different forms of knowledge and skills) but one of degree (a qualitative difference) within a single overarching policy. VET and higher education should reflect the range of skills, jobs, occupations, employers and industries for which they prepare graduates, rather than continue to superimpose a categorical distinction on their graduates, a situation which is increasingly anachronistic in Australia's modern economy.

More attention to articulation and pathways

Many senior participants in universities and private providers saw their VET offerings as providing an effective pathway into higher education. Conversely, program leaders and teachers often reported that such pathways were difficult to navigate, or even non-existent. A prime barrier was the differing pedagogic and assessment regimes in the two sectors – in particular, interpreting competency-based training outcomes for credit in higher education programs.

The new AQF should provide a helpful basis for further work in this area. The requirement in the latest AQF that all qualifications provide students with the knowledge and skills they need to study at a higher level in their field should facilitate greater coherence and continuity in the curriculum in VET and in higher education qualifications. Such an approach is consistent with treating the sectoral divide as qualitative rather than categorical. Work to improve pathways will need to take place at a number of levels, including ensuring the involvement of tertiary education institutions, but also more

broadly by supporting collaboration between the industry skills councils that develop national training packages, the professional bodies that specify requirements for their professions and educational institutions. This work should be guided by the Standing Council for Tertiary Education, Skills and Employment and be supported by policies that reward institutions that both collaborate in this way and which demonstrate good pathways between qualifications in both sectors.

Extensive research has been conducted on the structure of different pathways and qualifications – such as whether they are dual awards, dual offers, embedded programs, sequential programs, etc. (PhillipsKPA 2010). However, more focus is required on the institutional frameworks needed to support pathways and articulating students, and this includes institutional policies, governance, and strategic and administrative planning (Wheelahan 2009). This should be a priority for institutions, but also for the Commonwealth and state governments, which are encouraging greater collaboration between VET and higher education institutions for this purpose.

A national register of tertiary education and a single statistical collection

At present, there is no single national register of tertiary education institutions or qualifications in Australia and there is no single statistical collection. While the National Training Information Service includes all VET providers, it does not indicate whether they are also higher education providers. There is no national register of higher education institutions, and each state has its own higher education register. The only state that includes an institution's higher education and VET status on the one institutional record is the Victorian Registration and Qualifications Authority, but this does not include qualifications registered with the National Audit and Registration Agency and nor does it include universities' higher education qualifications.

Australia needs a single national register of tertiary education providers and qualifications which reflects the new integrated AQF and prepares for the merging of Australian Skills Quality Authority and the Tertiary Education Quality and Standards Agency. The absence of a national register makes it nearly impossible to gain a good understanding of the number and scope of mixed-sector and dual-sector institutions. This undermines attempts to develop coherent quality assurance requirements that consider the institution as a whole rather than its sectoral offerings independently.

Neither sector currently has a comprehensive statistical collection that collects and publishes data from all private providers, even though in theory both sectors now require full reporting of student data from all institutions regardless of the funding source. It is clear, however, that not all higher education providers report their student load to the Commonwealth, and private VET providers have not been required to report their privately funded students until recently, and the provision and publication of that data is not yet mandated. National tertiary policy requires a high-quality public national statistical collection as the basis for future planning and research, and there is no real reason why this cannot be a national statistical collection that encompasses both sectors, based on more streamlined reporting requirements. This was recognised by the Bradley Review (2008, p.191), which recommended that NCVER's scope be expanded to cover research, analysis and data collection for the whole tertiary education sector. A national statistical collection will be facilitated by a unique student identifier, and the Council of Australian Governments has given in-principle support for a national student identifier in VET 'with a future capability of being fully integrated with the entire education and training system' (Nous Consulting Group 2011, p.1). However, even if this were agreed, it will take considerable time to implement, and in the meantime it would assist policy development if the two statistical collections could be made more comprehensive to enable all effort in each sector to be recorded and made as consistent as possible in a national public statistical collection.

A national framework for the development of scholarship in mixed-sector teaching and learning

At the moment Australia has no national frameworks to support the development of teaching and scholarship in either the VET or higher education sectors. The Australian Learning and Teaching Council has been wound up, and its role in supporting scholarship and teaching in universities will be transferred to the Department of Education, Employment and Workplace Relations. Governments will in time consider other ways of supporting teaching and scholarship in universities; however, if they see higher education in TAFE and in private providers as an increasingly important part of higher education in Australia, they will need to incorporate support for scholarship in these institutions in whatever arrangements they make. This is the conclusion we draw from an analysis of the Australian Universities Quality Agency audits of non-self-accrediting higher education institutions, our previous research (Wheelahan et al. 2009) and international research.⁸

Similarly, there is currently no national framework to support scholarship or staff development in VET. Each state has its own arrangements, and these vary in scope and quality and the extent to which they support VET providers that are not publicly funded TAFE institutes. Skills Australia (2011, p.179) recommends that a national VET workforce development strategy that incorporates public and private providers be implemented, while the Australian Chamber of Commerce and Industry (2010) argues that:

There would also be considerable benefit in establishing a national professional development strategy that concentrates on knowledge and skills development in their industry area along with developmental pedagogy to assist VET practitioners in delivering skills and knowledge to learners.

A project conducted in 2010 that looked at the quality of teaching in VET also made recommendations to promote the scholarship of VET and to support teacher professional development (Wheelahan & Moodie 2010), as have other research projects funded by NCVET (Clayton et al. 2010; Guthrie 2010). While the states do undertake work in this area (for example, the TAFE Development Centre in Victoria and the Queensland VET Development Centre), there is as yet no mechanism for integrating insights from scholarly development, staff training and curriculum development, nor is there a mechanism for sharing experience and expertise within mixed-sector VET institutions, mixed-sector higher education institutions and private providers. In considering how to respond to Skills Australia's (2011) *Skills for prosperity: a roadmap for vocational education and training*, governments need to consider how support for professional development and scholarship in mixed-sector institutions can be included.

However, given the blurring of the sectoral divide, the requirement for greater curricular coherence across the sectors and the emphasis on pathways, it may be appropriate to consider establishing one national body with a remit for supporting scholarship and teaching in both sectors, even if each requires a different approach. There is increasing overlap in what the sectors do 'in the middle'. Support for developing scholarship at this level may help to increase curricular coherence and pathways for students, as well as career structures for teachers to enable them to teach at different levels and in both sectors.

Such a body would also be able to develop targeted programs for specific groups of teachers within tertiary education. For example, many VET teachers and units within mainly higher education institutions have difficulty getting VET's strong orientation to employment and distinctive curriculum

⁸ See the support document to Wheelahan et al. (2009) and Moodie et al. (2009) for a discussion of the international literature.

understood and accepted within their institution. There are also suggestions, although not supported by VET teachers themselves, that VET teachers in mainly higher education institutions may not maintain either their industry currency or the strong industry links that are desirable. Given that support for scholarship and teaching in both sectors is undergoing change and there is pressure for governments to review arrangements in both sectors, it may be appropriate to consider whether there is scope for creating a national body for both sectors.

As an interim measure, the Commonwealth and state governments, the Higher Education Research and Development Association and the Australian Vocational Education and Training Research Association, along with other relevant stakeholders, should consider holding a joint conference or seminar to deliberate on the challenges facing teaching staff in dual-sector and mixed-sector institutions. As a first step, NCVET is progressing this discussion and coordinating a small forum with a consortium led by the Victorian TAFE Development Centre (as at early 2012).

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Appendix 1: Methods

This section outlines the methodology used in this project.

This research project was shaped by three key questions which were designed to provide insights into the nature of provision in universities that offer a small amount of VET and private providers that offer both VET and higher education programs. The methods used in this project were similar to those used in the higher education in TAFE project (Wheelahan et al. 2009a). This was because this project complements the higher education in TAFE project. The three key questions were.

- What VET do the public single-sector universities offer? Why and how?
- What do mixed-sector private providers look like, what is the nature of their provision and what impact is this having on the VET–higher education sectoral divide?
- What are the general conclusions about the impact of mixed-sector provision on the sectoral divide in tertiary education, and what are the consequences for policy, institutions, teachers and students?

The three key research questions were elaborated to structure the research. Different aspects of each question were analysed and a number of issues emerged that required further investigation. This analysis was informed by the higher education in TAFE project, relevant national and international literature and policy documents. The identification of issues to be explored emerged from this literature and our understanding of issues and controversies in tertiary education in Australia and the available sources of data. These issues were used as broad guides to structure the research rather than as a prescriptive framework.

The first question: what VET do the public single-sector universities offer? Why and how? was further elaborated to explore:

- the reasons universities offer VET, how they offer it, governance, the way in which VET is managed within the university, and the way in which the different curriculum, reporting, funding, and quality assurance arrangements for VET and higher education are navigated
- how pathways are constructed and managed and the types of credit-transfer arrangements in place
- the way in which teachers understand their role, if they differentiate between VET and higher education provision and the reasons why they do or do not, the issues and concerns they have, the way they see the future development of VET at the university, their role in its development and delivery, and their views on the way VET can be developed
- the reasons why students decided to undertake VET at the university, their student identities as VET, higher education or university students, their aspirations and career trajectories, their experiences of the programs and their recommendations for the way they can be improved.

The second question: what do mixed-sector private providers look like, what is the nature of their provision and what impact is this having on the VET–higher education sectoral divide? was further elaborated to explore:

- how and why private providers became mixed-sector institutions, their institutional identity as providers within tertiary education, the way in which they are structured, how they manage their VET and higher education provision, governance, staffing, and the nature of any partnerships they may have with industry, professional bodies, and with TAFE institutes and universities. Also

explored was the way in which the different curriculum, reporting, funding, and quality assurance arrangements for VET and higher education are navigated

- how pathways are constructed and managed and the types of credit-transfer arrangements that are in place
- the nature of staff and student identities, if (and if so, the extent to which) each identifies as primarily VET or higher education within the institution, how they project their identity to those outside the institution, and how that aligns with the way in which the institution publicly portrays its institutional identity
- the reasons why students decided to undertake their studies at that institution, their aspirations and career trajectories, their experiences of the programs and their recommendations for the way they can be improved
- the way in which teachers understand their role, the issues and concerns they have, their perspectives on VET and higher education programs, and the relationship between them, how they see educational programs developing at their institution, and their role in its development and delivery.

The third question: what are the general conclusions about the impact of mixed-sector provision on the sectoral divide in tertiary education, and what are the consequences for policy, institutions, teachers and students? was further elaborated to explore:

- the place of mixed-sector institutions in an increasingly diversified tertiary education sector in Australia
- how the emerging tertiary education policy environment, architecture and sectoral arrangements will affect mixed-sector providers
- particular challenges for mixed-sector institutions and for policy concerning quality assurance, accreditation, governance, funding, and reporting
- how the sectoral divide is being reworked within mixed-sector institutions
- whether there are differences between mixed-sector TAFE institutes, private providers and universities
- how mixed-sector provision can be supported so that it opens opportunities for students and meets the needs of the community and workforce.

The project used a range of methods under the broad categories of desktop research and interviews to address these research questions. The desktop research included a review of Australian and international literature on dual-sector and mixed-sector tertiary education institutions and the tertiary education policy literature more broadly. It also included research of submissions to and the report of the Review of Australian Higher Education (Bradley 2008), institutional audits by the Australian Universities Quality Agency (AUQA), state government tertiary education plans and the policies and websites, qualifications registers and registration and accreditation policies of Commonwealth and state government regulatory bodies.

The project also analysed higher education institutional student data from the Department of Education, Employment and Workplace Relations to ascertain equivalent full-time student load (EFTSL) and the growth in private providers in recent years, and the National Training Information Service to identify institutions' VET provision. It was not possible to ascertain EFTSL or even student numbers in VET programs in the institutions included in this project because this information is not

yet publicly available. Consequently, we compared institutions' programmatic focus and their higher education field of education and VET field of education by comparing EFTSL in higher education and the number of programs and their field of education in VET. This is not ideal, but there was no alternative.

There is no single national register of tertiary education institutions (or qualifications) in Australia. The National Training Information Service is a national register of all VET providers, but it does not indicate whether they are also higher education providers. There is no national register of higher education institutions, and each state has its own higher education register. The only state that includes an institution's higher education and VET status on the one institutional record is the Victorian Registration and Qualifications Authority. Cross-sectoral institutions were identified by compiling a list of all non-self-accrediting higher education institutions, universities and self-accrediting institutions and checking to see whether they also were registered on the National Training Information Service. This was sometimes supplemented by searches on institutional websites, because in some cases the same company used a different trading name for their higher education and VET provision. We could not rely only on the institutions reported in the Department of Education, Employment and Workplace Relations higher education statistics because there are more non-self-accrediting higher education institutions on the state registers than appear in the department's statistics. All higher education institutions are now required to report to the department, regardless of their funding status, and it seems that it will take a few years for this requirement to be implemented. There are providers for which student load is not recorded in the Department of Education, Employment and Workplace Relations statistics; however, it may also be the case that some institutions may still be registered as higher education providers but not offer any programs.

Interviews

As with the higher education in TAFE project, this project sought contrasting perspectives from different types of stakeholders within public universities and private providers, within the private sector more broadly, and across state jurisdictions. A multiple case study design was used to structure the project (Hall 2008, p.110). It included interviews with staff in three state jurisdictions; four senior representatives from the private sector; and senior staff, teachers and students in four universities (and their associated registered training organisations) and five cross-sectoral private providers. Of the four senior representatives from the private sector, two were from a representative body, one was a senior researcher, and the final one was a senior executive with responsibility for multiple providers who also has had extensive experience in the public sector. We only focused on the VET registering authorities in this project, as the higher education in TAFE project included six state offices of higher education. Insights from the latter were drawn from the higher education in TAFE project, and we focused in this project on the perspective of those involved in registering VET providers and in overseeing the quality and standards of VET qualifications. However, the interviewee in one jurisdiction included in this project had responsibility for both VET and higher education. Institutional interviews were held in:

- *Four universities that offer a small amount of VET provision:* two universities were registered as registered training organisations in their own right, and two owned companies that were registered as training organisations (and in one case, as both a registered training organisation and a higher education provider). It included one Group of Eight university, one regional university, one university established prior to the 1988 Dawkins reforms, and a metropolitan 'new' university established after those reforms. Of the latter two universities, one was registered as a registered training organisation and the other had a subsidiary company.

- *Five private providers that are registered to offer both VET and higher education:* one was a religious college, one was in the creative arts industries, two were in health (including one in natural health), and one in hospitality and tourism. We were also able to gain further insights into four of these institutions through the audit reports of the Australian Universities Quality Agency. The audit of the remaining provider is not due until later in 2011.

We used purposeful sampling in selecting institutional sites, but also in selecting interviewees within sites (Creswell 2008, p.214). ‘Maximal variation sampling techniques’ were used to identify interviewees within institutions to ensure we were able to interview senior managers, teachers and students. We tried to interview one teacher who taught VET and one who taught higher education in the private providers, but this did not always prove possible. Eight of the teachers taught both VET and higher education programs; five taught in higher education and four in VET. This is helpful in gaining the perspectives of teachers across both sectors, but more research is needed to gain insights from teachers who teach exclusively in one or the other sector.

Some 19 students were interviewed. Originally we sought to interview two VET students from each university and one higher education and VET student from each private provider. We did not interview students (or teachers) at one provider associated with one university, and this is because of the structure of that provider and the way they envisaged their practice. Instead of teachers, they employed consultants, and instead of students they taught clients who were mostly from enterprises that had engaged this provider to conduct training. While they were pleased to participate in the project and provide senior staff for interview, they felt that it would not be appropriate to ask their consultants and clients to participate. The client was often the enterprise that employs staff, rather than individual staff members. The students we interviewed at the remaining universities were much more traditional in that they enrolled individually in specific programs. Interviews were held with two students at three of the five private providers, three students at one other provider, and four students at the final provider.

The six students we interviewed at universities were all studying VET programs; however, two of these students were studying VET as part of an embedded award within their degree, as this is how VET qualifications in this field were taught at that university. Of the students from private providers, seven were higher education students, although two had articulated from VET qualifications in the same field into degrees at that institution. The remaining six students were studying VET. The different categories of interviewees were:

- three staff in VET registering bodies in three states
- four staff who were senior private sector stakeholders/representatives
- 18 senior staff at four universities and five private providers
- 17 teachers at three universities and five private providers
- 19 students at three universities and five private providers.

Appendix 2 provides a more detailed profile of each category of interviewee.

Ethical clearance for the project and its interview protocols was obtained from the Melbourne Graduate School of Education at the University of Melbourne (ref. no: Melbourne Graduate School of Education HREC: 1034158.1). We sought permission from each institution to conduct the research and worked with a person nominated by the institution to identify potential interviewees according to the criteria we supplied. Interviewees were contacted in each institution by that institution and they

were asked whether they were willing to participate. Interviewees were provided with information about the project and they were advised that they could withdraw at any time and that there would be no consequences if they did so. All participants were guaranteed anonymity and we had guaranteed institutional leaders that their institutions would not be able to be identified, even indirectly, without their express permission. The great majority of institutional interviews were held in person, and two of the four interviews with private sector representatives and one interview with one state jurisdiction were held by phone. Interviews were mostly held with individuals, but there were a few occasions where interviews were held with two people, at their request. Interviews with students were between 30 and 45 minutes, while most interviews with remaining interviewees lasted from between 45 minutes to one hour.

Semi-structured interviews were used to ensure consistency in the interviews and thus allow comparison across sites and categories of interviewees, while at the same time allowing the interviewee the ability to develop their ideas and address issues they considered important (Hillier & Jameson 2003, p.103). Eight interview schedules were developed for this project for different types of participants and they followed the interview formats of the higher education in TAFE project as closely as possible. The interview questions were developed from our review of the literature and from the outcomes of the higher education in TAFE project. We developed the following interview schedules:

- jurisdictions
- private sector representatives
- senior executives from company with multiple providers
- senior managers in universities and their registered training organisations
- senior managers in private providers
- teachers in universities and their registered training organisations
- teachers in private providers
- students.

An interpretative approach was used to analyse the interviews as the aim was to represent and understand the meanings of participants (Hall 2008, p.258). All interviews were written up using a pre-prepared template, for consistency and ease of analysis, and analysed with the aid of NVivo software (Hall 2008, p.266). All interviews were read through several times before being ordered within a case-ordered matrix (Hall 2008, p.266). Themes were analysed and grouped into major and minor themes (Creswell 2008, pp.258–9).

Limitations

One limitation in this project is that we included only four universities and five private providers. It would have been ideal to have replicated the higher education in TAFE project in its entirety, and include six universities that offered VET, two universities that did not offer VET and perspectives from dual-sector universities in exploring VET provision in universities, and similar numbers of private providers that offered both VET and higher education and those that offered provision in only one sector. However, we were constrained by the scope of the project and available funding. The project was designed to make best use of the available resources. It was possible to conduct interviews at a majority of TAFE institutes offering higher education, as there were only ten TAFE institutes offering higher education at that time. This is not the case with universities that offer VET, or private providers that offer both higher education and VET, given the numbers in each category.

Moreover, the purpose of the project was not to identify representative samples of each type of institution. It was based on a contrastive model designed to identify different types of institutions, the type of provision they provide, and issues that arose in each (Pawson 2006; Sayer 1992). Incorporating a representative sample of institutions would have required a different research design, but it also would have been premature.

Mixed-sector institutions are a relatively under-researched field in Australia because of their relative newness. In order to develop concepts and categories for future research, we need to identify perspectives, issues, problems and benefits which can then be tested in subsequent research and modified in the process. This was achieved by exploring participants' perspectives at contrasting types of institutions. Moreover, the similarities in the research design between this project and the higher education in TAFE project meant that we were able to explore the extent to which the issues we identified in the higher education in TAFE project were raised by different types of institutions in this project. This project also tested the analytical frameworks we had developed to structure the project, which were related to differences between single-sector, mixed-sector and dual-sector institutions, and the role of educational sectors and the public–private divide in structuring institutional identities and perspectives. The project thus used a case study design to illustrate more general points and principles (Cohen, Manion & Morrison 2007, p.253). While it would have been good to have had the same number of universities and private providers, the numbers involved were sufficient to test findings from the literature and to build on the findings from the higher education in TAFE project. Overall, the propositions derived from the higher education in TAFE research and literature were confirmed, but they were also deepened, modified and became more nuanced, resulting in a modified understanding of the role of sectors in structuring institutional identities and new insights that can be used as a resource in further research.

The statistical data available for this project were limited, as was the case for the higher education in TAFE project. While all higher education providers have been required since 2009 to report their student load to the Department of Education, Employment and Workplace Relations, it is clear that not all do so yet. The data on student numbers in higher education are thus limited, but more accurate data will be available in future. The limitations with available data in VET are more far-reaching. Until recently, private providers were not required to report their number of privately funded students. NCVER (2011) published a report on 10 June 2011 for the first time of all registered training organisations in Australia that receive public VET funding (after this project was completed). Prior to this, only reports on VET students in public institutions and publicly funded students in private institutions were published at state and national levels. The NCVER report on providers mentioned above does not include privately funded students at private registered training organisations, and while the VET provision of some of the universities and private providers was included in this report, much of it is privately funded and thus not able to be ascertained. This is a serious limitation to any research in tertiary education in Australia. However, we were able to identify the VET programs offered by all institutions from the National Training Information Service and thus gain an accurate understanding of their scope.

The absence of a national register of tertiary education institutions which lists their status as VET–higher education providers is also a limitation for this research. It is difficult and cumbersome to identify the number of cross-sectoral institutions, and this undermines policy that is seeking to develop a coherent tertiary education sector.

This research provided initial insights into teachers' and students' views, but more extensive research that systematically explores the experiences of different categories of teachers and students is

needed. In particular, more extensive research is needed to understand the experience of casual teachers, given their importance in mixed-sector provision. While not universally the case, many of the teaching staff we interviewed in this project were working full-time in their institution and have a central role in their institution or department. Consequently, while we were able to tap into perspectives about institutional identity, the nature of teaching and learning, vocational relevance, sectoral issues and so forth, we were unable to understand the working experience of casual staff. Given that there is no staff data collection for private providers in higher education and no staff data collection of any sort in VET, it is difficult to determine the extent to which teachers in these types of institutions are casualised, but anecdotally it was suggested that many teachers are casuals.

Unlike the higher education in TAFE project, which included mainly younger students, this project included mainly older students. Only four of the 19 students were aged under 25 years. In the absence of published student data it is not possible to determine the age composition of students in private providers or those undertaking VET in universities, but anecdotally it seems that students do tend to be older. It is important to try and understand the perspectives of younger students, as this sort of provision is likely to become more important in opening access to tertiary education for young people, particularly for those from disadvantaged backgrounds. However, in the absence of well-established categories due to the newness of this research, and as with the higher education in TAFE project, our aim was to use qualitative research methods to identify the problems and issues as well as the benefits students experience as the basis for further research.

Appendix 2: Profile of interviewees

Table A.1 Senior staff interviews

Staff type	No. interviewed
University VC/DVC/Dean responsible for HE	4
University VC/DVC/Dean responsible for VET	2
University VC/DVC/Dean responsible for HE and VET	2
Private VC/DVC/Dean responsible for HE	1
Private VC/DVC/Dean responsible for HE and VET	4
University manager/supervisor responsible for VET	1
University manager/supervisor responsible for VET and HE	1
Private manager/supervisor responsible for VET	1
Private manager/supervisor responsible for VET	1
Private manager/supervisor responsible for VET and HE	1
Total	18

Note: HE = higher education.

Table A.2 Profile of teachers

Attribute	No. interviewed
<i>Sex</i>	
Female	12
Male	5
<i>Programs they teach in</i>	
HE only	5
VET only	4
Both HE and VET	6
Centre/department heads with VET/HE	2
<i>Field of education</i>	
Agriculture	2
Arts and theology	1
Creative arts	2
Education	3
Health	4
Hospitality	2
Outdoor education	1
Psychology	2
Total	17

Note: HE = higher education.

Table A.3 Profile of students interviewed for project

Attribute	No. interviewed
<i>Sex</i>	
Female	11
Male	8
<i>Age range</i>	
15–19	1
20–24	5
25–44	8
45 and over	5
<i>Institution type</i>	
University	6
Private college	13
<i>Sector</i>	
HE	7
VET	9
VET and HE	3
<i>Field of education</i>	
Agriculture	2
Creative arts	2
Education	5
Health	2
Hospitality	4
Outdoor education	2
Psychology	2
Total	19

Note: HE = higher education.

Table A.4 Other interviewees

Type	No. interviewed
Senior staff of state government VET regulators	3
Senior private sector representatives	4
Total	7

Appendix 3: Profile of mixed-sector universities and private providers

Growth of the private sector

The private VET and higher education sectors have grown dramatically over the past three years. The equivalent full-time student load (EFTSL) in private higher education providers grew by 192.7% from 2006 to 2009 (derived from Department of Education, Employment and Workplace Relations 2010a; Department of Education, Science and Training 2007). In 2009 it was 52 368 EFTSL, which constituted 6.4% of all higher education student load (Department of Education, Employment and Workplace Relations 2010a). VET has also grown. TAFE's number of publicly funded full-time training equivalents grew by 13% from 2005 to 2009, while the growth of publicly funded full-time training equivalents in private providers over the same period was 38.7% (NCVER 2010b, table 14).

The growth in the number of international students has been spectacular. The higher education sector's share of international students is 32.1% and it grew by 24.5% from 2005 to 2009. TAFE's share grew by 130.8%, but its total share of international students is only 6.3%. In contrast, private VET providers account for 30.5% of international students, and they grew by 297.3% over that period. Most of the remaining international students are in English language intensive courses; they account for 21.6% of students and they grew by 111.4% from 2005 to 2009 (NCVER 2010b, table 19). The international student market is, however, becoming tighter in response to government changes to migration policies, the imposition of stricter requirements for students studying at VET providers and the appreciation of the Australian dollar.

Overall, international students account for 40.7% of EFTSL in private higher education providers (Department of Education, Employment and Workplace Relations 2010a). This varies substantially by type of provider. Private providers in the creative arts, society and culture, and health fields of education tend to have very few international students. This is the same for professional bodies that run programs for their profession. In contrast, private providers in the management and commerce fields of education – and those that are focused on university pathways – are dominated by international students. Of the six TAFE institutes that reported higher education student load for 2009, William Angliss, Holmesglen and Swan institutes had a majority of their EFTSL as international students (57%, 54.4% and 83% respectively), while Box Hill had 18.5%, the Gordon had none, and Northern Melbourne had 22.4%.

Government policies have stimulated the growth in the numbers of domestic students in private providers. The extension of income-contingent loans in both sectors has fuelled the growth of full-fee-paying domestic students. Fee-HELP was made available for full-fee-paying students in private higher education providers in 2007, and VET Fee-HELP was made available in July 2009 for privately funded VET students studying at diploma level and above. States and territories are progressively introducing contestable funding for VET provision. This means that private providers are increasing their share of publicly funded VET students.

Private providers

Only about half of all private registered higher education providers reported student load in 2009. The Commonwealth Government now requires all higher education institutions to report their student

load. This means data should have greater coverage in coming years. Overall, all private higher education provision is concentrated in four main fields of education, which account for 82% of EFTSL. The four biggest fields of education within all private higher education providers (single- and mixed-sector) are society and culture, which includes religious studies (31.7%); management and commerce (24.7%); creative arts (15.6%); and health (10%) (Department of Education, Employment and Workplace Relations 2010a, table 4).

Table A.5 summarises different categories of mixed-sector private providers that reported higher education student load in 2009. The group with the largest amount of EFTSL is the management and commerce group. Overall, health, creative arts and 'other' private providers have the highest concentration of higher education provision within their main field of education (see table A.7 for more information about each institution), while management and commerce have the least. This reflects the different types of providers in each category and their main focus. The category of religious institutions is also highly concentrated, with the exception of Avondale College. It has only 42% of provision in its main field of education (which is education), but it accounts for almost 54% of student load in religious institutions. The main field of education for the remaining religious institutions is society and culture; their provision in this field ranges from 75% to 100%. Providers in the management and commerce field of education include the Navitas-owned Institutes of Business and Technology and other big providers which partner with universities to provide pathways into degree programs in universities in a number of fields of education. The field of education with the largest EFTSL for these providers is management and commerce; however, they also include fields of education such as information technology; creative arts; engineering; and, food, hospitality and personal services.

Table A.5 Mixed-sector private providers reporting HE load in 2009 by VET scope of registration (excluding TAFE)

College type	Higher education	Vocational education and training programs					
	EFTSL	Scope of registration*	Cert. I & II	Cert. III & IV	Dip. & adv. dip.	Voc. grad cert. & dip.	Units of comp.
Creative arts	4 027	60	5	18	28	1	8
Health	2 025	38	3	13	21	1	
Management & commerce	11 799	277	39	119	70	1	48
Religious	1 990	66	2	25	15	0	24
Other	2 918	71	8	23	38		2
All	22 759	512	57	198	172	3	82

Note: * Refers to the number of qualifications plus stand-alone units of competency that registered training organisations are accredited to offer.

Table A.5 also shows the number of VET programs by level in each category and its scope of registration. Scope of registration refers to programs or individual units of competency that institutions are accredited to offer. So, overall, mixed-sector private providers offer 512 qualifications at different levels or individual units of competency. We have used scope of registration and main field of education as a proxy for scale and diversity of VET provision, because (unfortunately) student load by institution in VET is not published, so it is not possible to compare

loads from the two sectors.⁹ The categories with highly concentrated higher education provision generally have VET qualifications in the same field of education (again with the exception of Avondale College). They also have proportionally more higher-level VET qualifications and are thus able to use diplomas and advanced diplomas as pathways into their higher education programs.

Institutions in the management and commerce category also tend to have VET qualifications in fields that are aligned with their higher education qualifications; in some cases their VET programs are in food, hospitality and personal services and these programs articulate into higher education programs in the management and commerce field of education, usually in hospitality or tourism management degrees. Their qualifications include a preponderance of certificates III and IV because qualifications at these levels lead to occupational outcomes in their own right and as pathways to higher level studies. The Navitas-owned Institutes of Business and Technology are an exception; they account for 75.4% of EFTSL in this category and they have a small number of VET qualifications in foundation studies which articulate into their higher education diplomas that are linked to degrees in universities.

Big providers such as Navitas, the Think: Education Group, Laureate International Universities, and Kaplan are playing an increasingly important role in tertiary education in Australia. All are part of international companies that have providers in Australia. The Think: Education Group is wholly owned by Seek Ltd. Seek Ltd also owns Seek Learning Pty Ltd, which provides access to a range of higher education and VET qualifications offered by other providers. The biggest group is Navitas. Its Institutes of Business and Technology and workforce-oriented providers such as the Australian College of Applied Psychology, the Australian Institute of Public Safety, and SAE/Qantm account for 26.3% of EFTSL in all higher education private providers.

Rather than having large, multidisciplinary or comprehensive institutions, the big private conglomerates have a range of providers that specialise in one or a small number of areas. Kaplan has four providers mainly focusing on business, English and university entrance. The Think: Education Group has nine providers that specialise in different areas, such as hospitality, design, natural therapies, beauty therapies and business. Laureate International Universities owns a university–preparation college and it owns two hotel schools. The strength of the private tertiary education market means that these companies are diversifying and acquiring smaller providers. As a result, this has slightly reduced the number of separate private providers over the last few years. The Think: Education Group has recently acquired the Southern School of Natural Therapies, and Navitas has recently acquired SAE/Qantm.

While all conglomerates are similar in having providers that specialise in a small number of fields, their structure and management model differs. Each Navitas institution has its own separate registration as a higher education and/or VET provider. In contrast, all Think: Education Group providers are listed under one registration for higher education and VET: the Think: Education Group registration. For this reason, we have counted the Navitas providers as separate providers but have counted the Think: Education Group as one provider.

⁹ TAFE institutes must report on all training that they do, whether it is publicly or privately funded. At the moment, private providers are only required to report on the publicly funded VET provision they offer. Up until June 2011, student numbers and full-year training equivalents had only been published at national and state levels and not at individual provider level. NCVET (2011) published data in June 2011 that list training delivery in publicly funded training providers for the first time.

Universities and TAFE institutes

Universities that offer a small amount of VET and TAFE institutes that offer higher education are on a different trajectory. Apart from the dual-sector universities, the universities that offer VET do so for four main reasons. The first is as a historic legacy from a time when universities offered sub-graduate qualifications, such as the music programs at the University of Adelaide (Duncan & Leonard 1973, p.41; Moodie 2010, p.14). The second is as a consequence of amalgamations, usually with an agricultural college, such as the VET programs at the University of Queensland's Gatton campus. The third is to vertically integrate their provision and supply their baccalaureate programs with students. Some route their domestic and international students through the same pathways, while at other universities the pathways are starkly separate for domestic and international students. The last reason is to expand their role, such as those universities that have established companies to service corporate needs. In most cases, universities are offering VET to support particular objectives, and not to change their institutional character or sectoral mission. No mixed-sector university has an explicit goal of developing into a dual-sector university.¹⁰ Universities also divest themselves of their VET programs when it does not support their central focus, or when there needs to be more attention on VET provision which does not align with the university's focus. An example of the former is the University of Melbourne's divestment of its VET programs in agriculture. An example of the latter is the Vocational Training and Education Centre in Kalgoorlie, which is separating from Curtin University to become a separate government-funded VET provider.¹¹

Universities tend to offer a relatively small number of VET programs and to teach in a narrow range of fields of education; however, there are exceptions. The University of Queensland Gatton campus offers 41 programs in three fields of education as a consequence of merging with the Queensland Agricultural College in 1990. The Western Australian Academy of Performing Arts is part of Edith Cowan University and it offers 21 programs in four fields of education. The Australian Maritime College merged with the University of Tasmania in 2008 and it offers 37 qualifications in two fields of education. The University of New England has a registered training organisation called UNE Partnerships and it has 49 items on its scope of registration and teaches in five fields of education. Charles Sturt University has 17 items on its scope of registration and teaches in five fields of education. The NSW Government prohibits universities in that state from becoming registered training organisations in their own right, and so they are required to establish subsidiary companies as registered training organisations. The rest mostly offer a smaller number of qualifications in a fairly narrow range of fields of education. Full details of universities that offer VET (apart from the dual-sectors) are in table A.8.

There are now 11 TAFE institutes registered to offer higher education. In *Higher education in TAFE* (Wheeler et al. 2009a) we identified two types of TAFE institutes that offered higher education. The first saw their higher education programs as an extension of their role as VET providers, while the trajectory of the second was to become tertiary education colleges, polytechnics or university colleges. This is reflected in the status of different TAFE institutes as registered higher education providers. Challenger Institute of Technology (formerly TAFE) in Western Australia has relinquished its higher education registration. Similarly, while the Gordon Institute of TAFE in Victoria is still a registered higher education institution (and it is included here as a higher education institution), it is

¹⁰ Central Queensland is a single-sector university and it plans to become a dual-sector university – it hopes through a merger with Central Queensland TAFE. See the Vice-Chancellor's blog: <<http://vc-cquniversity.blogspot.com/>> viewed 21 July 2011.

¹¹ See: <<http://kalg.curtin.edu.au/>> viewed 5 April 2011. Curtin University still has status as a registered training organisation but this will lapse in time, unless it chooses to maintain its registration for other purposes.

transferring its sole degree to Deakin University and it will deliver the degree on behalf of Deakin. On the other hand, Chisholm Institute of TAFE in Victoria became a higher education provider in 2010, and TAFE NSW registered as a higher education provider in late 2010, but this includes all ten TAFE institutes in that state. It offers only one degree thus far, but is planning to develop more. It has established a governing council, academic board, and higher education executive group.¹²

If a TAFE does not anticipate changing its character to include substantial higher education provision, it makes sense for it to relinquish its higher education registration and to partner with a university to deliver degrees on its behalf. This is because the resources that are required to become and remain a higher education provider are substantial, and the registration and accreditation processes are onerous. If, however, a TAFE wants to change its character to become a tertiary education college, it will need to invest in this process and offer sufficient provision in both sectors to ensure economies of scale and the development of the infrastructure needed to accommodate the requirements of both sectors.

Higher education provision in TAFE institutes is still quite small and at the moment only about half report their student load to the Department of Education, Employment and Workplace Relations. However, their trajectory is to grow and, in most cases, their intention is to become tertiary education providers that offer a full range of programs, including higher education programs. This is reflected in the Victorian TAFE institutes that have the longest history of offering higher education programs. Northern Melbourne Institute of TAFE, Box Hill and Holmesglen have 59 accredited higher education qualifications between them, which are offered in seven fields of education. Table A.10 contains more information about TAFE institutes that offer higher education.

¹² See: <<http://www.highered.tafensw.edu.au/governance.html>> viewed 5 April 2011.

Table A.6 Number of mixed-sector non-self-accrediting private providers, excluding TAFE institutes, by state

State/territory	No.
ACT	0
Northern Territory	0
NSW	23
Queensland	6
South Australia	10
Tasmania	0
Victoria	12
Western Australia	6
Total	57

Source: Compiled from the National Training Information Service website and from state and territory higher education registers.

Table A.7 Private providers which reported higher education student load (EFTSL) to DEEWR in 2009 and which were registered training organisations in 2011

College	State	Higher education			Vocational education					Main field(s)	
		EFTSL	% student load in main field	Scope of registration ^a	Number of each qualification level offered						
					<i>Cert. I & II</i>	<i>Cert. III & IV</i>	<i>Dip. & adv. dip.</i>	<i>Voc. grad. cert. & dip.</i>	<i>Units of competency</i>		
JMC Pty Ltd (The JMC Academy)	NSW	1 368	Creative arts (82)	15			7			8	Creative arts
National Institute of Dramatic Art (NIDA)	NSW	163	Creative arts (100)	3		2	1				Creative arts
Raffles College of Design and Commerce	NSW	870	Creative arts (90)	18	2	6	10				Creative arts
SAE Institute/QANTM ^b	NSW	1 249	Creative arts (100)	8		4	4				Creative arts
Whitehouse Institute Pty Ltd	NSW	377	Creative arts (100)	16	3	6	6	1			Creative arts
<i>Subtotal creative arts colleges</i>		<i>4 027</i>		<i>60</i>	<i>5</i>	<i>18</i>	<i>28</i>	<i>1</i>		<i>8</i>	
Australian College of Natural Medicine Pty Ltd (Endeavour College of Natural Health)	QLD	1 910	Health (100)	22	3	8	10	1			Health
Nature Care College Pty Ltd	NSW	115	Health (100)	16		5	11				Health
<i>Subtotal health colleges</i>		<i>2 025</i>		<i>38</i>	<i>3</i>	<i>13</i>	<i>21</i>	<i>1</i>			
Blue Mountains International Hotel Mgt School	NSW	484	Mgt & comm. (49)	6		2	4				Food & hosp.
Carrick Higher Education	Vic.	88	Mgt & comm. (100)	52	10	22	20				Food & hosp.
Cengage Education Pty Ltd	NSW	54	Mgt & comm. (80)	94	10	39	9			36 ^c	Mgt & comm.

Holmes Institute Pty Ltd	Vic.	1 450	Mgt & comm. (100)	16	1	6	9		Mgt & comm.	
International College of Management Sydney	NSW	288	Mgt & comm. (64)	14		7	6	1	Tourism & hospitality	
Macleay College Pty Ltd	NSW	348	Mgt & comm.(57)	22	3	5	11	3 ^d	Mgt & comm.	
Melbourne Institute of Business & Technology	Vic.	2 298	Mgt & comm. (70)	1		1			Education	
Perth Institute of Business and Technology	WA	660	Mgt & comm. (32)	2		2			Education	
Queensland Institute of Business & Technology	QLD	1 390	Mgt & comm. (37)	2		2			Education	
Sarina Russo Schools Australia Pty Ltd	QLD	73	Mgt & comm. (100)	51	15	26	7	3 ^e	Mgt & comm.	
South Aust Institute of Business & Technology	SA	636	Mgt & comm. (36)	1		1			Education	
Sydney Institute of Business & Technology	NSW	3 908	Mgt & comm. (48)	2		2			Education	
International College of Hotel Management	SA	122	Food & hosp. (100)	14		4	4	1	5	Food & hosp.
<i>Subtotal management colleges</i>		<i>11 799</i>		<i>277</i>	<i>39</i>	<i>119</i>	<i>70</i>	<i>1</i>	<i>48</i>	
Adelaide College of Divinity Inc.	SA	44	Soc. & culture (91)	8	2	4	2			Soc. & culture
Avondale College Ltd	NSW	1 068	Education (42)	12		8	4			Mgt & comm.
Harvest Bible College Inc.	Vic.	178	Soc. & culture (100)	5		2	3			Soc. & culture
Tabor College (NSW) Ltd ^f	NSW	46	Soc. & culture (100)	3		2	1			Soc. & culture
Tabor College (Victoria) Inc.	Vic.	165	Soc. & culture (95)	26		1	1		24	Soc. & culture
Tabor College Inc. (Tabor College Adelaide)	SA	489	Soc. & culture (75)	12		8	4			Soc. & culture
<i>Subtotal religious colleges</i>		<i>1 990</i>		<i>66</i>	<i>2</i>	<i>25</i>	<i>15</i>	<i>0</i>	<i>24</i>	
Australian College of Applied Psychology	NSW	1 782	Soc. & culture (96)	4			4			Soc. & culture
Oceania Polytechnic Institute of Education	Vic.	64	Arch. & build. (100)	7		2	5			Creative arts
Think: Education Group ^g	NSW	1 072	Creative arts (42)	60	8	21	29		2	Creative arts, Mgt & comm., Food & hosp., Health
<i>Subtotal other colleges</i>		<i>2 918</i>		<i>71</i>	<i>8</i>	<i>23</i>	<i>38</i>		<i>2</i>	
All		22 759		512	57	198	172	3	82	

- Notes:
- This is the total number of qualifications, accredited courses and stand-alone units that a training organisation is registered to provide.
 - SAE acquired QANTM in 2004 and the latter is no longer a separate VET provider and now uses SAE's registration. The 2009 higher education load reported to the Department of Education, Employment and Workplace Relations for both institutions are here added together.
 - One of these is a 'Course in Property Practice (Real Estate)'.
 - These are three courses in property practice.
 - One of these is a 'Course in Implement Traffic Guidance Scheme'.
 - Tabor College NSW is currently delivering VET and higher education courses through Emmaus Bible School, and the VET courses noted here are registered through Emmaus.
 - The Think Group includes the mixed-sector institutions APM College of Business and Communication, the Billy Blue College of Design, the William Blue College of Hospitality Management and the Southern School of Natural Therapies.

Sources: Department of Education, Employment and Workplace Relations (2010, table 2.8); National Training Information Service website.

Table A.8 Number and level of VET qualifications and main field of education in VET by university (excluding dual-sector universities and Batchelor Institute of Indigenous Tertiary Education)

University	Registered training organisation	Scope of VET registration	Number of each programs at each VET level					No. of fields covered in VET	Main field covered in VET
			Cert. I & II	Cert. III & IV	Dip. & adv. dip.	Voc. grad cert. & dip.	Accredited courses/ units of comp.		
Australian Catholic University	Australian Catholic University (St Patrick's campus)	16	1	10	5			4	Health, Education
Charles Sturt University	CSU Training	17	1	10	2	2	2	5	Mgt & comm.
Curtin University of Technology	Curtin Vocational Training and Education Centre	6		1	5			3	Health
Deakin University	DeakinPrime	8		2	2		4	1	Mgt & comm.
Edith Cowan University	West Australian Academy of Performing Arts	21	3	3	7		7	4	Perform. arts
Griffith University	Griffith University	2		1			1	1	Education
La Trobe University	La Trobe University	1		1				1	Indig. studies
Monash University	Monash University Centre for Ambulance and Paramedic Studies	6	1	2	1		1	1	Health
	Monash Student Association (Clayton) Inc.	10		6	1		3	3	Mgt & comm.
University of Adelaide	University of Adelaide	4		2	2			2	Creative arts
	Radio Adelaide	11	5	6				1	Creative arts
University of Canberra	University of Canberra College Pty Ltd	16	7	7	1		1	4	Society & culture
University of New England	UNE Partnerships Pty Ltd	49		26	19		4	3	Mgt & comm.
University of Notre Dame Australia	University of Notre Dame Australia	5	1	3	1	1		2	Health
University of Queensland	University of Queensland (Gatton campus)	41	7	21	12		1	3	Agriculture
	The University of Queensland, the Institute of Continuing & TESOL Education	3		2	1			1	Education

University	Registered training organisation	Scope of VET registration	Number of each programs at each VET level					No. of fields covered in VET	Main field covered in VET
			Cert. I & II	Cert. III & IV	Dip. & adv. dip.	Voc. grad cert. & dip.	Accredited courses/ units of comp.		
University of Tasmania	Australian Maritime College	37	6	12	1	1	17	2	Engineering
University of Western Sydney	UWS College	22	3	13	4		2	3	Mgt & comm.
University of Wollongong	International Training & Careers College Wollongong University College, Wollongong College Australia	9		5	4			3	Mgt & comm.

Source: Derived from National Training Information Service website.

Table A.9 VET and higher education provision of mixed sector non-self-accrediting institutions, excluding TAFEs

Institution	HE main field	No. HE qualifications	VET main field	VET scope of registration
Academy of Information Technology Pty Ltd	Creative arts	3	Creative arts	12
Adelaide College of Divinity Inc.	Soc. & culture	7	Soc. & culture	8
Alphacrucis College Ltd	Soc. & culture	5	Mgt & comm.	19
Australian College of Applied Psychology	Soc. & culture	4	Soc. & culture	4
Australian College of Natural Medicine Pty Ltd (Endeavour College of Natural Health)	Health	7	Health	22
Australian Guild of Music Education Inc.	Creative arts	1	Creative arts	6
Australian Institute of Business Administration Pty Ltd	Mgt & comm.	53	Mgt & comm.	27
Australian Institute of Management NSW & ACT Training Centre Ltd registered in NSW ^a	Mgt & comm.	0	Mgt & comm.	39
Australian Institute of Management QLD & NT	Mgt & comm.	2	Mgt & comm.	33
Australian Institute of Management South Australian Division Inc (AIM SA)	Mgt & comm.	5		60
Australian Institute of Music Ltd	Creative arts	11	Creative Arts	4
Australian Institute of Professional Counsellors Pty Ltd	Soc. & culture	1	Soc. & culture	19
Avondale College Ltd	Education	44	Mgt & comm.	12
Blue Mountains International Hotel Management School Pty Ltd	Mgt & comm.	10	Food & hosp.	12
Cambridge International College (Vic.)	Mgt & comm.	5	Most fields	43
Canning College	Mgt & comm.	1	Mgt & comm., Education	6
Carrick Higher Education Pty Ltd	Mgt & comm.	3	Mgt & comm.	52
Cengage Education Pty Ltd	Mgt & comm.	3	Most fields	94
Chifley School of Business	Mgt & comm.	6	Mgt & comm.	8
College of Nursing	Health	13	Health	8
Entrepreneurship Institute Australia	Mgt & comm.	24	Mgt & comm.	14
Eynesbury Institute of Business and Technology	Mgt & comm.	3	Mgt & comm.	1
Gibaran Graduate School of Business Pty Ltd	Mgt & comm.	76	Mgt & comm.	17
Group Colleges Australia Pty Ltd (Universal International College)	Mgt & comm.	6	Mgt & comm., IT, Food & hosp.	24
Harvest Bible College Inc.	Soc. & culture	8	Soc. & culture	5
Holmes Institute Pty Ltd	Mgt & comm.	6	Mgt & comm., IT, Food & hosp.	16
International College of Hotel Management (ICHM Pty Ltd)	Food & hosp.	1	Food & hosp.	14

Institution	HE main field	No. HE qualifications	VET main field	VET scope of registration
International College of Management, Sydney Pty Ltd	Mgt & comm.	15	Mgt & comm., Food & hosp.	14
ITC Education Ltd (Wollongong College Australia)	Mgt & comm.	4	Mgt & comm.	9
Jazzworx! Pty Ltd	Creative arts	1	Creative arts	6
JMC Pty Ltd (The JMC Academy)	Creative arts	15	Creative arts	15
Kaplan Education Pty Ltd, Kaplan Professional	Mgt & comm.	4	Mgt & comm.	42
Le Cordon Bleu Australia	Mgt & comm.	9	Food & hosp.	18
Macleay College Pty Ltd	Mgt & comm.	6	Mgt & comm., Food & hosp.	22
Melbourne Institute of Business & Technology Pty Ltd	Mgt & comm.	7	Education	1
Montessori World Educational Institute (Australia)	Education	2	Education	2
National Institute of Dramatic Art (NIDA)	Creative arts	7	Creative arts	3
Nature Care College Pty Ltd	Health	3	Health	16
Navitas College of Public Safety	Soc. & culture	4	Soc. & culture	23
Oceania Polytechnic Institute of Education Pty Ltd	Arch. & bldg	1	Arch. & bldg	7
Paramount College of Natural Medicine (Trading as ParaPharm Pty Ltd)	Health	5	Health	11
Perth Institute of Business and Technology Pty Ltd	Mgt & comm.	8	Education	2
Phoenix Institute of Victoria Pty Ltd	Soc. & culture	2	Soc. & culture	2
Queensland Institute of Business & Technology Pty Ltd	Mgt & comm.	7	Education	2
Raffles College Pty Ltd (Raffles College of Design and commerce)	Creative arts	11	Creative arts	18
SAE Investments (Aust) Pty Ltd (SAE Institute)/QANTM ^b	Creative arts	10	Creative arts	8
Sarina Russo Schools Australia Pty Ltd	Mgt & comm.	1	Mgt & comm., Food and hosp.	1
South Australian Institute of Business & Technology Pty Ltd	Mgt & comm.	5	Education	1
Stott's Colleges Pty Ltd	Mgt & comm.	3	Mgt & comm., Education	26
Sydney Institute of Business & Technology Pty Ltd	Mgt & comm.	9	Mgt & comm., IT	2
Tabor College (NSW) Ltd	Soc. & culture	5	Soc. & culture	3
Tabor College (Victoria) Inc.	Soc. & culture	9	Soc. & culture	26
Tabor College Inc. (Tabor College Adelaide)	Soc. & culture	52	Soc. & culture, Mgt & comm., Education	12
Tabor College Inc. (WA)	Soc. & culture	7	Soc. & culture	4

Institution	HE main field	No. HE qualifications	VET main field	VET scope of registration
Think: Education Group Pty Ltd ^c	Creative arts	59	Creative arts, Mgt & comm., Food & hosp., Health	60
Vose Seminary (Baptist Union of WA)	Soc. & culture	15	Soc. & culture	6
Whitehouse Institute Pty Ltd	Creative arts	1	Creative arts	16

- Notes:
- The Australian Institute of Management NSW is teaching out its higher education programs in 2011.
 - SAE acquired QANTM in 2004 and the latter is no longer a separate VET provider and now uses SAE's registration. SAE and QANTM are however registered as separate higher education providers in, respectively, NSW and Queensland, and their total number of higher education programs are here added together.
 - The Think Group includes the mixed-sector institutions APM College of Business and communication, the Billy Blue College of Design, the William Blue College of Hospitality Management and the Southern School of Natural Therapies.

Table A.10 TAFE institutes registered as higher education institutions, higher education EFTSL, and fields of education

TAFE	State	HE EFTSL ^a	No. of fields taught	No of programs accredited	Main field & % EFTSL in main field ^b
Box Hill Institute of Technical and Further Education	Victoria	426	6	16	Creative arts (55)
Canberra Institute of Technology	ACT		2	4	Creative arts
Chisholm institute of TAFE	Victoria		1	1	Health
Gordon Institute of TAFE ^c	Victoria	34	1	1	Creative arts (100)
Holmesglen Institute of TAFE	Victoria	511	7	20	Mgt & comm. (60)
Northern Melbourne Institute of TAFE	Victoria	223	4	23	Creative arts (48)
Polytechnic West	WA	53	3	6	Mgt & comm. (66)
Southbank Institute of Technology	Queensland		1	2	Engineering
TAFE SA ^d	SA		2	3	Creative arts/ Mgt & comm.
Technical and Further Education Commission (trading as TAFE NSW Higher Education) ^e	NSW		1	1	Architecture & building
William Angliss Institute of TAFE	Victoria		2	2	Mgt & comm. (81)

Total^f

Notes: Challenger Institute of Technology (formerly TAFE) in Western Australia has relinquished its higher education registration.

- a. For those TAFE institutes that reported higher load to DEEWR.
- b. Given for those TAFE institutes that reported HE load and for those teaching in only one field.
- c. The Gordon is transferring all its students in the Bachelor of Arts (Visual Arts) (which is their only higher education program) to Deakin University and will thus relinquish its higher education accreditation. The Gordon will still deliver the program on Deakin's behalf (<<http://www.gordontafe.edu.au/index.cfm?Action=4&SecAction=2&terAction=1>>).
- d. TAFE SA currently has three accredited programs in two fields of education, but this will expand to three fields of education and six qualifications later in 2011.
- e. TAFE NSW is registered as one higher education provider, but this incorporates its ten TAFE institutes within that registration.
- f. Challenger Institute of Technology (formerly TAFE) in Western Australia has relinquished its higher education registration.

Source: Compiled from Department of Education, Employment and Workplace Relations (2011) and from state and territory higher education registers.

Support document details

Additional information relating to this research is available in *Shaken not stirred? The development of one tertiary education sector in Australia – support document*. It can be accessed from NCVER's website <<http://www.ncver.edu.au/publications/2450.html>>. Details include:

- Mixed sector tertiary education: universities and private providers – interview questions for the private provider peak body
- Mixed sector tertiary education: companies with multiple providers – institutional leaders
- Mixed sector tertiary education: universities and private providers – interview questions for stakeholders and jurisdictions
- Mixed sector tertiary education: universities and private providers – interview questions for students
- Mixed sector tertiary education: private providers – institutional leaders
- Mixed sector tertiary education: VET teachers/academics in private providers – interview questions for teachers/academics
- Mixed sector tertiary education: universities with VET or affiliates – institutional leaders
- Mixed sector tertiary education: VET teachers/academics in universities – interview questions for teachers/academics
- Statement for participants
- Statement for students

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