This is an alternative text version of *VET provider market structures: registered training organisations — infographic*. It is designed to be read via a screen reader and consequently has had all visual elements removed. Please see the online version available at <http://www.ncver.edu.au/infographics> if you wish to view the full version.

# VET provider market structures: registered training organisations — infographic

This infographic presents a summary of registered training organisations (RTOs) in the Australian vocational education and training (VET) system from 1988 to 2016. Using data on training organisation registrations, it analyses the number of RTOs entering and leaving the nationally accredited system.

This data has been collated and supplied by [training.gov.au](http://training.gov.au/) and covers registrations with current regulators (including Australian Skills Quality Authority; Victorian Registration and Qualifications Authority; and Western Australia's Training Accreditation Council), and former regulators (including ACT Department of Education and Training; Queensland Department of Education, Training and Employment; NSW Vocational Education and Accreditation Board; NT Department of Education; Tasmanian Qualifications Authority; SA Department of Further Education, Employment, Science and Technology).\*

This infographic is a companion to the [*VET provider market structures: history, growth and change* report](http://www.ncver.edu.au/publications/publications/all-publications/2871). It contains updated and more extensive data. For further analysis and explanation, please consult the report. It is also supplemented by the infographic, [*VET provider market structures: students and enrolments*](https://www.ncver.edu.au/data/data/infographics/vet-market-structures-students-and-enrolments-infographic)*,* which analyses how students and enrolments are distributed across the providers in the system.

## Total number of registered training organisations

The total number of training organisations registered in each year includes training organisations who registered during the year, those whose registration expired or cancelled during the year, and continuing providers (i.e. those who had registered in a previous year and were registered for the whole year).

The total number of RTOs peaked in 2010 at 5314 and the number of expiries/cancellations peaked in 2002 at 496. The number of private providers peaked in 2010 at 3874 and the number of other providers peaked in 2000 at 1610.

The increase in registrations in the late 1990s is in part a consequence of the implementation of the National Training Framework (underpinned by the Australian Recognition Framework) in 1998. Providers had to be registered to deliver nationally accredited training, whereas previously the registration process applied mainly to private training organisations (ANTA 1997). It was at this point that many of the providers that were currently operating and delivering training registered for the first time (including TAFE institutes).

Mergers or restructures of RTOs can result in the expiration or cancellation of previous registrations and a new registration associated with the merged and restructured organisation. This reflects changes in the regulatory governance of the provider and not necessarily fundamental changes in its operation (e.g. the campuses and facilities it runs). For example, three separately registered TAFE SA providers were replaced by a single new registration for TAFE SA as part of a restructure in 2014.

Total number of registered training organisations: By registration status

|  |  |  |  |
| --- | --- | --- | --- |
| Year | Continuing | Expired/Cancelled | New |
| 1988 | 0 - 0% | 0 - 0% | 1 - 100% |
| 1989 | 1 - 100% | 0 - 0% | 0 - 0% |
| 1990 | 1 - 100% | 0 - 0% | 0 - 0% |
| 1991 | 1 - 10% | 0 - 0% | 9 - 90% |
| 1992 | 10 - 10% | 0 - 0% | 88 - 90% |
| 1993 | 98 - 52% | 0 - 0% | 90 - 48% |
| 1994 | 187 - 50% | 1 - 0% | 183 - 49% |
| 1995 | 366 - 51% | 4 - 1% | 344 - 48% |
| 1996 | 697 - 54% | 13 - 1% | 586 - 45% |
| 1997 | 1197 - 59% | 86 - 4% | 754 - 37% |
| 1998 | 1894 - 53% | 57 - 2% | 1649 - 46% |
| 1999 | 3352 - 78% | 191 - 4% | 767 - 18% |
| 2000 | 3628 - 77% | 491 - 10% | 604 - 13% |
| 2001 | 3850 - 81% | 382 - 8% | 514 - 11% |
| 2002 | 3868 - 81% | 496 - 10% | 419 - 9% |
| 2003 | 3888 - 82% | 399 - 8% | 449 - 9% |
| 2004 | 3923 - 81% | 414 - 9% | 526 - 11% |
| 2005 | 3962 - 81% | 487 - 10% | 445 - 9% |
| 2006 | 4138 - 86% | 269 - 6% | 422 - 9% |
| 2007 | 4196 - 83% | 364 - 7% | 497 - 10% |
| 2008 | 4219 - 81% | 474 - 9% | 493 - 10% |
| 2009 | 4337 - 83% | 375 - 7% | 538 - 10% |
| 2010 | 4464 - 84% | 411 - 8% | 439 - 8% |
| 2011 | 4615 - 89% | 288 - 6% | 263 - 5% |
| 2012 | 4577 - 89% | 301 - 6% | 279 - 5% |
| 2013 | 4462 - 87% | 394 - 8% | 246 - 5% |
| 2014 | 4331 - 87% | 377 - 8% | 277 - 6% |
| 2015 | 4281 - 87% | 327 - 7% | 323 - 7% |
| 2016 | 4323 - 88% | 281 - 6% | 326 - 7% |

Total number of registered training organisations: By provider type

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Year | Private training provider | TAFE | Other\*\* | Total |
| 1988 | 1 - 100% | 0 - 0% | 0 - 0% | 1 |
| 1989 | 1 - 100% | 0 - 0% | 0 - 0% | 1 |
| 1990 | 1 - 100% | 0 - 0% | 0 - 0% | 1 |
| 1991 | 9 - 90% | 0 - 0% | 1 - 10% | 10 |
| 1992 | 40 - 41% | 0 - 0% | 58 - 59% | 98 |
| 1993 | 91 - 48% | 1 - 1% | 96 - 51% | 188 |
| 1994 | 195 - 53% | 5 - 1% | 171 - 46% | 371 |
| 1995 | 399 - 56% | 14 - 2% | 301 - 42% | 714 |
| 1996 | 789 - 61% | 27 - 2% | 480 - 37% | 1296 |
| 1997 | 1322 - 65% | 30 - 1% | 685 - 34% | 2037 |
| 1998 | 2261 - 63% | 54 - 2% | 1285 - 36% | 3600 |
| 1999 | 2721 - 63% | 64 - 1% | 1525 - 35% | 4310 |
| 2000 | 3050 - 65% | 63 - 1% | 1610 - 34% | 4723 |
| 2001 | 3080 - 65% | 63 - 1% | 1603 - 34% | 4746 |
| 2002 | 3125 - 65% | 64 - 1% | 1594 - 33% | 4783 |
| 2003 | 3082 - 65% | 72 - 2% | 1582 - 33% | 4736 |
| 2004 | 3204 - 66% | 71 - 1% | 1588 - 33% | 4863 |
| 2005 | 3286 - 67% | 72 - 1% | 1536 - 31% | 4894 |
| 2006 | 3243 - 67% | 72 - 1% | 1514 - 31% | 4829 |
| 2007 | 3489 - 69% | 71 - 1% | 1497 - 30% | 5057 |
| 2008 | 3640 - 70% | 67 - 1% | 1479 - 29% | 5186 |
| 2009 | 3762 - 72% | 59 - 1% | 1429 - 27% | 5250 |
| 2010 | 3874 - 73% | 57 - 1% | 1383 - 26% | 5314 |
| 2011 | 3805 - 74% | 57 - 1% | 1304 - 25% | 5166 |
| 2012 | 3821 - 74% | 58 - 1% | 1278 - 25% | 5157 |
| 2013 | 3820 - 75% | 58 - 1% | 1224 - 24% | 5102 |
| 2014 | 3770 - 76% | 59 - 1% | 1156 - 23% | 4985 |
| 2015 | 3812 - 77% | 54 - 1% | 1065 - 22% | 4931 |
| 2016 | 3864 - 78% | 59 - 1% | 1007 - 20% | 4930 |

## Initial training organisation registrations

There was a peak in registrations in 1998 in part due to the implementation of the National Training Framework, which required providers to be registered to deliver nationally accredited training (ANTA 1997). Schools and TAFE institutes represented a larger than usual proportion of registrations in that year. The percentage of initial registrations associated with each type of provider can be seen by putting the mouse cursor over the corresponding section of the column.

Initial training organisation registrations: By provider type

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Year | Private training provider | TAFE | Other\*\* | Total |
| 1988 | 1 - 100% | 0 - 0% | 0 - 0% | 1 |
| 1989 | 0 | 0 | 0 | 0 |
| 1990 | 0 | 0 | 0 | 0 |
| 1991 | 8 - 89% | 0 - 0% | 1 - 11% | 9 |
| 1992 | 31 - 35% | 0 - 0% | 57 - 65% | 88 |
| 1993 | 51 - 57% | 1 - 1% | 38 - 42% | 90 |
| 1994 | 104 - 57% | 4 - 2% | 75 - 41% | 183 |
| 1995 | 204 - 59% | 9 - 3% | 131 - 38% | 344 |
| 1996 | 392 - 67% | 13 - 2% | 181 - 31% | 586 |
| 1997 | 544 - 72% | 4 - 1% | 206 - 27% | 754 |
| 1998 | 996 - 60% | 29 - 2% | 624 - 38% | 1649 |
| 1999 | 505 - 66% | 11 - 1% | 251 - 33% | 767 |
| 2000 | 450 - 75% | 0 - 0% | 154 - 25% | 604 |
| 2001 | 384 - 75% | 0 - 0% | 130 - 25% | 514 |
| 2002 | 320 - 76% | 2 - 0% | 97 - 23% | 419 |
| 2003 | 343 - 76% | 11 - 2% | 95 - 21% | 449 |
| 2004 | 420 - 80% | 0 - 0% | 106 - 20% | 526 |
| 2005 | 395 - 89% | 1 - 0% | 49 - 11% | 445 |
| 2006 | 350 - 83% | 1 - 0% | 71 - 17% | 422 |
| 2007 | 450 - 91% | 0 - 0% | 47 - 9% | 497 |
| 2008 | 419 - 85% | 1 - 0% | 73 - 15% | 493 |
| 2009 | 484 - 90% | 2 - 0% | 52 - 10% | 538 |
| 2010 | 391 - 89% | 0 - 0% | 48 - 11% | 439 |
| 2011 | 239 - 91% | 1 - 0% | 23 - 9% | 263 |
| 2012 | 250 - 90% | 1 - 0% | 28 - 10% | 279 |
| 2013 | 230 - 93% | 0 - 0% | 16 - 7% | 246 |
| 2014 | 259 - 94% | 2 - 1% | 16 - 6% | 277 |
| 2015 | 308 - 95% | 0 - 0% | 15 - 5% | 323 |
| 2016 | 305 - 94% | 5 - 2% | 16 - 5% | 326 |

## Expired and cancelled registrations

Prior to 2010 almost all RTOs officially left the system when their registration expired – they may have stopped delivering accredited training (even prior to their registration expiring) or they may have unsuccessfully applied for renewal.

Since 2011 most RTOs officially left when they requested that their regulator cancel their registration – this may be due to a number of reasons, including competitive pressures. During the same period the number of cancellations without the consent of the RTO has risen. This coincides with the establishment of ASQA and may reflect changes in regulatory practice (such as risk-based regulation and reviewing registrations mid-term).

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Year | Expired | Cancelled (with consent) | Cancelled (without consent) | Total |
| 1988 | 0 | 0 | 0 | 0 |
| 1989 | 0 | 0 | 0 | 0 |
| 1990 | 0 | 0 | 0 | 0 |
| 1991 | 0 | 0 | 0 | 0 |
| 1992 | 0 | 0 | 0 | 0 |
| 1993 | 0 | 0 | 0 | 0 |
| 1994 | 1 - 100% | 0 - 0% | 0 - 0% | 1 |
| 1995 | 4 - 100% | 0 - 0% | 0 - 0% | 4 |
| 1996 | 11 - 85% | 2 - 15% | 0 - 0% | 13 |
| 1997 | 82 - 95% | 4 - 5% | 0 - 0% | 86 |
| 1998 | 53 - 93% | 4 - 7% | 0 - 0% | 57 |
| 1999 | 191 - 100% | 0 - 0% | 0 - 0% | 191 |
| 2000 | 486 - 99% | 5 - 1% | 0 - 0% | 491 |
| 2001 | 377 - 99% | 5 - 1% | 0 - 0% | 382 |
| 2002 | 493 - 99% | 3 - 1% | 0 - 0% | 496 |
| 2003 | 391 - 98% | 8 - 2% | 0 - 0% | 399 |
| 2004 | 411 - 99% | 3 - 1% | 0 - 0% | 414 |
| 2005 | 487 - 100% | 0 - 0% | 0 - 0% | 487 |
| 2006 | 269 - 100% | 0 - 0% | 0 - 0% | 269 |
| 2007 | 359 - 99% | 5 - 1% | 0 - 0% | 364 |
| 2008 | 462 - 97% | 10 - 2% | 2 - 0% | 474 |
| 2009 | 362 - 97% | 9 - 2% | 4 - 1% | 375 |
| 2010 | 408 - 99% | 3 - 1% | 0 - 0% | 411 |
| 2011 | 155 - 54% | 125 - 43% | 8 - 3% | 288 |
| 2012 | 75 - 25% | 206 - 68% | 20 - 7% | 301 |
| 2013 | 117 - 30% | 261 - 66% | 16 - 4% | 394 |
| 2014 | 83 - 22% | 269 - 71% | 25 - 7% | 377 |
| 2015 | 87 - 27% | 219 - 67% | 21 - 6% | 327 |
| 2016 | 100 - 36% | 133 - 47% | 48 - 17% | 281 |

## Applications to ASQA

ASQA publishes details about the number of applications for initial registration and renewal of registration it completes each financial year. This indicates the number of potential applicants for provider registration and the number of RTOs with expired registrations that wanted to continue operating but were rejected. Putting the mouse cursor over the rejected applications reveals the percentage of all completed and withdrawn applications that were rejected.

|  |  |  |
| --- | --- | --- |
|  | Approved | Rejected\*\*\* |
| Initial |  |  |
| 2011-12 | 68 | 48 - 31.4% |
| 2012-13 | 185 | 42 - 14.9% |
| 2013-14 | 286 | 44 - 12.2% |
| 2014-15 | 242 | 25 - 9.2% |
| 2015-16 | 387 | 78 - 16.1% |
| Renewal |  |  |
| 2011-12 | 186 | 28 - 12.1% |
| 2012-13 | 556 | 63 - 9.5% |
| 2013-14 | 862 | 33 - 3.5% |
| 2014-15 | 753 | 25 - 3.2% |
| 2015-16 | 617 | 38 - 5.7% |

## Notes

\* On 1 July 2011, ASQA became the regulatory body for the vocational education and training (VET) sector for the Australian Capital Territory, the Northern Territory and New South Wales. ASQA also assumed responsibility for regulating certain registered training organisations (RTOs) in Victoria and Western Australia from that date. ASQA became the regulatory body for the VET sector in Tasmania after state referral legislation was proclaimed on 15 February 2012, the regulatory body for the VET sector in South Australia on 26 March 2012, and the regulatory body for the VET sector in Queensland on 1 July 2012 <<https://www.asqa.gov.au/about/agency-overview/establishment-and-legislation>>.

\*\* ‘Other’ includes schools, community education providers, enterprise providers and universities.

\*\*\* Once ASQA rejects an application, the applicant can submit a new application, apply to ASQA to have it reconsider its decision or apply to the Administrative Appeals Tribunal <<https://www.asqa.gov.au/vet-registration/contest-asqa-decision>>.

## Data sources and references

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