



E-Learning in Australia¹

1.	Overview	1
2.	Market Demand and Drivers	3
2.1	Market Size	3
2.2	Demand and Drivers for E-Learning	3
3.	Australian Qualifications and Accreditation	5
4.	Key Sectors.....	6
4.1	Primary and Secondary Education (K-12 Schools Sector).....	6
4.2	Vocational Education & Training (VET)	7
4.3	Universities and Private Education	8
4.4	Corporate & Government Training Programs.....	9
5.	Developers and Suppliers in the Australian Market.....	10
6.	Trade Events.....	11
7.	Market Resources.....	11

1. Overview

The strong Australian economy is undergoing a digital transformation as a result of the development of a new National Broadband Network and the Government's Digital Education Revolution. The growth and the rate of change within the Australian economy present opportunities for Canadian companies within the e-learning, online education, training and certification industries.

There is strong support for the e-learning industry from industry and government bodies. Recent Federal Government initiatives have been designed to improve access to high speed broadband technologies in schools and regional or remote areas of the country while a number of Australian organisations exist which are focused on the development and implementation of e-learning in academic and corporate learning programs.

Australia's widely dispersed population across vast geographic areas has always presented a need for innovative education technologies. Consequently, technologies for education are viewed in a positive light and new modes of learning are readily adopted.

Market Advantages

There are many positive aspects for Canadian companies interested in doing business with Australia. Australians are early adopters of innovative technology and products; as one indicator of this, the mobile phone penetration rate is currently 115%.

Australian business practices are very similar to those in Canada, making it easier to set up a branch/subsidiary or to establish relationships with potential distributors, resellers, or other partners. While Australia is an ethnically and culturally diverse society, English is the official language. There are no tariffs on software and hardware imported into Australia.

Many Canadian ICT companies use Australia as a base to expand to nearby Asian markets. This may be done directly or through partnership with Australian firms which already have networks and business experience in the region.

¹ The Government of Canada has prepared this report based on secondary sources of information. Readers should take note that the Government of Canada does not guarantee the accuracy of any of the information contained in this report, nor does it necessarily endorse the organizations listed herein. Readers should independently verify the accuracy and reliability of the information.

Market Challenges

Companies interested in offering *accredited* courses of study will need to comply with the national framework of qualifications - the Australian Qualifications Framework (AQF), and ensure that the appropriate assessment and qualifications process is undertaken. (For more information refer to Section 3).

Distance to market may be a problem for some Canadian companies. However, there are direct flights from Vancouver to Sydney. Total time required for air travel from Toronto, including airport wait times is around eighteen to twenty hours.

2. Market Demand and Drivers

2.1 Market Size

In 2009, IBIS World estimated the annual turnover of the Australian online education industry to be \$2.8 billion, with 764 businesses². Their definition includes education institutions which deliver online education to students including IT certification, undergraduate and postgraduate courses, school education, short courses, and TESOL courses & tutoring. To be considered online over 80% of the course or unit content must be delivered online.

A narrower definition of the e-learning market made by the National Digital Learning Resources Network (NDLRN) estimates the market to have an annual turnover of \$600 million in 2009, (about 1-2% of the global e-learning industry). This includes 300 businesses directly operating in the industry, employing 2,400 people. Most of the businesses are small (employing an average of 8 people)³.

Most companies tend to specialise within one of the following sectors:

- Primary/Secondary Schools (K-12)
- Vocational Education and Training (VET)
- Corporate Sector Training (e.g. for business, government, associations, etc.)

2.2 Demand and Drivers for E-Learning

The online education sector in Australia has grown rapidly over the past 5 years. IBIS World states an annual growth rate for 2004-09 of 27.3%, and an expected growth rate over the 2009-14 period of 12.8%⁴.

Key drivers of growth in the industry include the higher uptake of broadband internet services, greater acceptance and use of internet and multimedia technologies, programs of support from government and industry, and strong local content and program development capabilities.

Broadband Internet Technologies

The new CDN\$40billion National Broadband Network aims to connect 90% of all Australian premises with fibre-based services and 10% with next generation wireless and satellite technologies. More information can be found at www.nbnco.com.au

The rollout of the new network has commenced in the States of Tasmania and Queensland and the Tasmanian service will be switched on in August 2010.

Broadband penetration rates have grown rapidly since 2006 - the first time the number of broadband subscriptions outnumbered dial-up services.

Over the same period, higher download speeds became available, in particular in major capital cities (e.g. Sydney, Melbourne, Brisbane, Adelaide, Perth), where the rollout of ADSL2+ occurred.

² IBIS World Industry Report X0008 – Online Education in Australia, September 2009

³ Impact on the multimedia & elearning industry of the sustainable national digital curriculum resource supply for schools agreement, The Le@rning Federation, 12 May 2009

⁴ IBIS World Industry Report X0008 – Online Education in Australia, September 2009

Demand for Internet, Multimedia, and Interactive Technologies

A 2009 Economist Intelligence Unit report benchmarking overall e-readiness across countries, ranked Australia sixth in the world, and first within the Asia Pacific Region⁵

The Australian Interactive Media Industry Association (AIMIA) highlights that there has been growth in organisations digital services expenditure to engage their customers. With greater use of digital services within organisations, it is likely that this would extend to the use of similar technologies to engage their employees or members.

There is increasing demand by students for e-learning and technology to be incorporated into their schools, courses or programs. Part of this demand can be attributed to greater IT literacy of the population (evident through higher usage of the internet, devices such as smart phones, web 2.0 technologies, and other technologies).

The following quote highlights expectations in the K-12 schools sector: *“Today’s students expect technology – they are digital natives, plugged in to an array of devices to watch, listen and interact”*⁶

Digital Education Revolution

Within the schools system, access to broadband technologies is being improved as part of the Federal Government’s Digital Education Revolution (DER).

As an example, in the latest NSW budget (June 2010), the Department of Education and Training was granted an additional AU\$75 million to improve access to ICT as part of the federal government’s digital education revolution. A further AU\$47 million will be spent on expanding technology-based learning over the next four years.

The DER provides CDN\$2 billion over six years and aims to provide:

- new ICT equipment for all secondary schools through the National Secondary School Computer Fund
- support to the deployment of high speed broadband connections to Australian schools
- ensuring teachers have access to training in the use of ICT
- online curriculum tools and resources supporting the national curriculum and specialist subjects
- online learning and access to parents and children
- support mechanisms to provide vital assistance for schools in the deployment of ICT.

For more information refer to:

<http://www.deewr.gov.au/Schooling/DigitalEducationRevolution/Pages/default.aspx>

Government and Industry Support for E-Learning

In addition to initiatives aimed at improving access to broadband technologies (e.g. NBN, DER), direct support for the industry is provided through industry bodies tasked with developing e-learning within the schools and VET sectors.

The National Digital Learning Resources Network (NDLRN) (formerly the The Le@rning Federation (TLF)), www.thelearningfederation.edu.au manages the national resource pool and infrastructure of digital curriculum resources within the schools sector.

⁶ Impact on the multimedia & elearning industry of the sustainable national digital curriculum resource supply for schools agreement, The Le@rning Federation, 12 May 2009

The Australian Flexible Learning Framework, www.flexiblelearning.net.au provides the e-learning strategy and resources for the VET sector, plus offers funding for e-learning initiatives and programs. Their programs also extend to information, resources and funding for industry.

Capabilities of Australian Industry Players

Australia has a strong interest in content and program development. This contributes to the competitiveness of the industry and in the push for development of new and innovative products. In recent years in particular, the State Governments of Queensland and Victoria have developed initiatives to develop and promote home-grown e-learning content and technologies.

Widely Dispersed Population

Australia's widely dispersed population across vast geographic areas has always presented a need for distance education technologies. As such, there is a positive attitude and ready adoption of online learning solutions.

In the schools sector, state/territory government distance education programs have been in place since 1948 when the first School of the Air (at the time connecting remote students over the radio) was started. In the corporate sector, the cost effectiveness of e-learning programs is a key benefit over the travel costs required to bring employees together for face-to-face instruction.

Trend of Lifelong Learning

There is an increasing trend towards lifelong learning, with a greater number of individuals undertaking short courses for corporate training, certification or general interest.

Industry Trends

Trends in the types of content and programs that are in demand in Australia were identified by The Le@rning Federation⁷ :

- The market is becoming more motivated by companies that focus on the business or learning needs of the end-customer, as opposed to only have a technology focus (e.g. LMS technology vendors with catalogues of associated content)
- Blended learning (using multiple modes of delivery), and collaborative learning environments are increasing in popularity
- More focus is being put on issues of change management, marketing, communication, and ongoing support to facilitate a successful implementation of e-learning programs (e.g. promoting and supporting teacher usage and demand).

3. Australian Accreditation for Providers of Education and Training

The Australian Qualifications Framework (AQF) (www.aqf.edu.au) is the quality assured national framework of qualifications in the school, vocational education and training (VET), and higher education sectors in Australia. All accredited courses need to adhere to these standards.

A provider must be a Registered Training Organisation (RTO) to deliver accredited training and assessment in Australia and issue AQF qualifications. State and Territory bodies register organisations under the Australian Quality Training Framework (AQTF).

⁷Impact on the multimedia & elearning industry of the sustainable national digital curriculum resource supply for schools agreement, The Le@rning Federation, 12 May 2009

All providers seeking to become a RTO must ensure that they meet the legislative and licensing requirements relevant to their scope of registration. Information on licensing bodies can be found through the appropriate state/territory registration and training authority.

For more information, please contact the Canadian Trade Commissioner Service in Sydney.

4. Key Sectors

4.1 Primary and Secondary Education (K-12 Schools Sector)

Overview

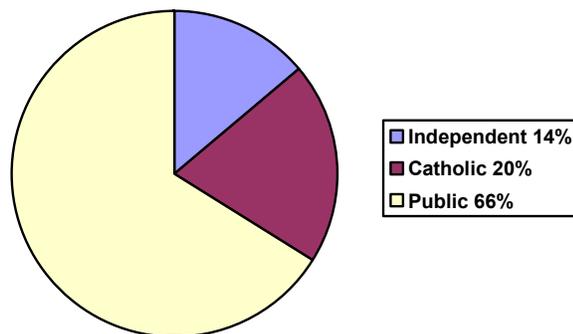
In Australia students attend primary and secondary school for a total of thirteen years, from Kindergarten through to Year 12 (often referred to as K-12).

Public schools (representing 66% of enrolments in 2008), are run by the state/territory governments.

The remaining 34% of enrolments in the private sector include both catholic schools and independent schools.

Independent schools are a growing sector (increasing from 11% of enrolments in 2000). They incorporate a variety of school types (many with a religious affiliation).

Proportion of Primary & Secondary School Enrolments- 2008



National Curriculum

A new national curriculum is under development by the Australian Curriculum Assessment and Reporting Authority (ACARA) for primary and secondary schools. A pilot of the program is to be conducted in 2011 amongst select schools. For more information refer to www.acara.edu.au and www.australiancurriculum.edu.au

Digital Curriculum

The **National Digital Learning Resources Network** (NDLRN) (formerly the The Le@rning Federation (TLF)), www.thelearningfederation.edu.au manages the national resource pool and infrastructure of digital curriculum resources, and will be responsible for aligning these resources with the Australian Curriculum as it develops. They identify that there is a need for an interactive digital curriculum content to enhance existing learning tools.

The K-12 schools sector is estimated to be a small and specialised component of the e-learning market. Historically the TLF funding of \$10 million per annum accounts for less than 2% of the market⁸.

Another relevant industry body is the Australian Council for Computers in Education (ACCE) www.acce.edu.au. ACCE is the national professional body for those involved in the use of ICT in education. Its members are the independent state/territory computer education groups and the Australian Computer Society (ACS).

Distance Education

Another application of e-learning technologies and materials within Australia is to schools that are part of the distance education network – providing programs to students whose circumstances prevent them from attending regular schools (e.g. students living in remote communities).

Different programs are run by each state/territory government– with varying sizes, structures and technologies used. For example in NSW distance education programs are carried by their broadband terrestrial Wide Area Network or 2-way satellite services, and uses technologies such as video and web conferencing. The Northern Territory uses their Remote Education and Conferencing Tool (REACT) software which enables staff and students from remote and urban locations to interact via virtual classrooms/videoconferencing using satellite and the schools WAN infrastructure.

State/Territory Government Education and Training Departments

In addition to public school education, government education and training departments are also responsible for vocational education and training through Technical and Further Education (TAFE) colleges.

The NSW Department of Education and Training (DET) is one of the largest state departments. With a recurrent budget of \$14.7 billion, the department is responsible for around one quarter of the State's total budget.⁹ The Centre for Learning Innovation (CLI) is part of NSW DET established to foster innovation in teaching and learning across the Department (including amongst other things the design and development of multimedia resources, innovative e-learning services, etc.) CLI provides products and services to NSW public schools, TAFE and to external organisations.

Queensland's Education Department has an ICT Learning Innovation Centre that promotes the use of e-learning products/initiatives. Their main activity is the delivery of more than 250 professional development conferences and events per year targeted at teachers.

4.2 Vocational Education & Training (VET)

Overview

Vocational education and training (VET) is focused on developing occupational skills. Types of qualifications that can be received include Certificates, Diplomas, Advanced Diplomas, Vocational Graduate Certificates and Diplomas.

The state/territory government run Technical and Further Education (TAFE) colleges are included within this sector. Other VET providers include:

- adult and community education providers
- agricultural colleges
- the VET operations of some universities, schools, private providers, community organisations, industry skill centres

⁸ Impact on the multimedia & elearning industry of the sustainable national digital curriculum resource supply for schools agreement, The Learning Federation, 12 May 2009

⁹ NSW Department of Education & Training website: <https://www.det.nsw.edu.au/aboutus/index.htm>

- commercial and enterprise training providers¹⁰.

Information on the structure of the VET sector is available at: **Training.com.au**, www.training.com.au - an information portal and gateway for the VET sector providing a sector overview, qualifications requirements, etc.

The **National Training Information Service (NTIS)**, www.ntis.gov.au, has a database of VET accredited courses, competency standards, training providers, plus other information relevant to training providers.

E-learning and Digital Resources in the VET Sector

The **Australian Flexible Learning Framework**, www.flexiblelearning.net.au is the e-learning strategy for the VET sector. It is collaboratively funded by the Federal and State/Territory governments to advance the use of e-learning in the VET sector. It provides essential e-learning infrastructure and expertise (eg. outlines standards for e-learning, has research and publications, news and events, etc.).

State of E-Learning within the VET sector

e-learning approaches are being used across a variety of teaching and training activities.

The uptake of 'formal' e-learning in the VET sector (often associated with content that is explicitly online and off-campus) has risen significantly over the past 5 years – from 4% in 2004 to 39% in 2009.

This estimate understates the actual usage of e-learning materials as it excludes e-learning that is occurring on campus and in blended delivery modes.

The most common uses of e-learning are currently the use of multimedia interactive learning resources while the use of technologies including web 2.0, mobile, voice, social networking and podcasting are less widespread.

Funding for E-Learning Projects

The Australian Flexible Learning Framework provides funding to develop e-learning projects/programs. For a list of funding opportunities refer to: <http://www.flexiblelearning.net.au/content/funding-opportunities#standards>

Another area of funding is for the Flexible Learning Toolboxes, a product developed for the Australian Flexible Learning Framework. In 2009, the Toolboxes were being used by 40-45% of VET teachers, trainers and students. Towards the start of each calendar year, a request for tender is released for new Toolboxes to be developed.

4.3 Universities and Private Education

There are 39 universities in Australia which are represented by the peak body, Universities Australia, www.universitiesaustralia.edu.au. In many cases e-learning programs that have been implemented are fairly decentralised, with varying programs across individual universities.

¹⁰ National Training Information Service Glossary: <http://www.ntis.gov.au/Default.aspx?glossary#v>

The Australasian Council on Open, Distance and E-Learning (ACODE), www.acode.edu.au, is the peak Australasian organisation for universities engaged or interested in open, distance, flexible and e-learning. Their mission is to enhance policy and practice in open, distance, flexible and e-learning in Australasian higher education. ACODE has 46 members which includes most Australian and New Zealand Universities.

The largest online higher education services provider is Open Universities Australia, www.open.edu.au. They provide access to vocational, undergraduate and post graduate courses. They have over 1000 units provided by Australian universities (and other tertiary education providers) Key disciplines taught include arts & humanities, business, education, engineering, health, information technology, law and science.

Examples of individual universities with a larger focus on distance education programs include: University of New England, Charles Sturt University, Deakin University, University of South Queensland.

Other general consortiums of universities (typically with a research & development focus) include the Group of Eight (Go8) a coalition of eight universities (www.go8.edu.au) and the Australian Technology Network (ATN) encompassing five universities. (www.atn.edu.au).

Private Education Providers

Private education providers are represented by the Australian Council for Private Education and Training (ACPET), www.acpet.edu.au. Navitas and Kaplan Australia are examples of major private education providers that operate in the Australian marketplace.

Many of these providers access e-learning programs, funding, and resources from the Australian Flexible Learning Framework (refer to section 4.2).

International Education Market

Similar to Canada, Australia is a multi-cultural society. It is dependent on migration for growth and has a strong international education market; (Total course spending by international students in Australia in 2007-08 was estimated to be A\$64 billion).

4.4 Corporate & Government Training Programs

Traditional education markets (e.g. schools, VET, higher education) represent only a small proportion of Australia's e-learning industry. A large segment is the corporate training market (including businesses, government departments, associations etc.).

In Australia some of the key drivers for organisations to implement e-learning programs are: its ability to expand participation, enable participation any where at any time, lower costs, save time, be customised, improve consistency, and facilitate recognition of existing skill sets in business. Associations represent a key sub-segment as many offer professional development training for their members.

There is crossover between the corporate training market and the VET/Higher Education sectors – in particular when the training undertaken by employees is accredited training.

Enterprise RTOs (ERTOs)

A segment of accredited VET training specific to corporate/government organisations is the sub-segment of Enterprise RTOs (ERTOs).

An ERTO is an RTO that provides accredited training to their employees and the core business is not the provision of training. (note: ERTOs are also included within the VET sector). The typical target audience for their training is new recruits/employees.

A report by the ERTO Association (ERTOAs) states that in July 2009, there were 256 ERTOs registered in Australia. They represent 5.2% of RTOs but are potentially generating at least 20% of annual VET qualification completions across Australia.

Industry Training Needs

Industry Skills Councils (ISCs), www.isc.org.au, in Australia collect information on training needs from industry employers, unions and industry professional associations in order to provide advice to government on what training is required within their industry. The 11 ISCs include:

- AgriFood Skills Australia
- Community Services & Health ISC
- Construction & Property Services ISC
- EE Oz (for the Electrotechnology, Communications, Electricity Generation, Transmission & Distribution, Rail Traction and Gas Supply Industries)
- Forest Works (Forest, Wood, Paper & Timber Products Industry)
- Government Skills Australia
- Innovation & Business Skills Australia
- Manufacturing Skills Australia (MSA)
- Service Skills Australia
- Skills DMC
- Transport & Logistics ISC

As part of their mandate, each ISC prepares an annual Environmental Scan of their industries outlining factors currently shaping and impacting on workforce development and how well current products/services within Australia's tertiary system are responding. For companies with products/services targeted at specific industries, this can provide a good market overview of the current needs and challenges of the industry. A copy of the Environmental Scans can be downloaded from the ISC website at: <http://www.isc.org.au/environmental-scans.php>

In the area of Occupational Health and Safety (OHS), national OHS Standards Training is published by Safe Work Australia. Further information on the standards and existing training courses is available at: <http://www.safeworkaustralia.gov.au>

The Australian Flexible Learning Framework, while primarily focused on the VET sector, simultaneously provides e-learning resources and funding for industry.

Other Corporate/Government Training and Development Programs

As individual organisations tend to develop their own programs, there is little consolidated information available on the size or growth of corporate and government training programs, what types of training are currently being delivered via e-learning, or how much is being developed internally vs. sourced from external providers.

Please contact the Consulate General of Canada in Sydney to discuss your specific areas of interest.

5. Developers and Suppliers in the Australian Market

The **National Training Information Service (NTIS)** directory, www.ntis.gov.au gives information on training providers and accredited courses in Australia (in particular for the VET sector).

Other directories or lists that may be helpful include:

- E-learning consultants and RTOs list on the Australian Flexible Learning Framework's page for industry:
http://industry.flexiblelearning.net.au/industry/index.php?option=com_content&task=view&id=28&Itemid=45
- Australian Public Service Commission Capability Development Panel (including 22 e-learning companies), <http://www.apsc.gov.au/learn/serviceproviders.doc>

6. Trade Events

Major Events – E-learning & HR	
LearnX Asia Pacific , E-learning & Training Solutions International Conference & Expo, Sydney, June 2011	www.learnx.net
Australian Computers in Education Conference – biennial conference of the Australian Council for Computers in Education (targeted at educators who use ICT in teaching and learning) Last event held in April 2010 Next event in Perth, WA Oct 2-5, 2012.	2012 event: http://acec2012.info/ 2010 event: http://acec2010.info/about
Australian Human Resource Institute (AHRI) National Convention (HR and People Management conference) Typically held in May/June each year	http://www.convention.ahri.com.au
Other Events/Workshops	
ePortfolios Australia Conference 2010 , Melbourne , 3-4 November 2010	http://www.flexiblelearning.net.au/content/e-portfolios-australia
Advanced e-learning masterclass, Melbourne August 3-4, 2010 - (Workshop tailored to those wanting to implement/improve e-learning in their organisation)	http://www.arkgroupaustralia.com.au/Events-D029-AdveLearning.htm
IDEA10 Learning Futures: Details for 2011 event not yet released. 2010 event was held in Melbourne in March 2010 focusing on current and emerging technologies that support learning.	http://www.linkaffiliates.net.au/idea10/index.html

7. Useful Websites

Market Resources	Website
Key Resources	
Digital Education Revolution Federal Government Initiative	www.digitaleducationrevolution.gov.au
National Training Information Service (list of VET accredited courses, competency standards, training packages and training providers)	www.ntis.gov.au
Australian Flexible Learning Framework (VET & Industry)	www.flexiblelearning.net.au
The Learning Federation Schools Online Curriculum Content Initiative (K-12 sector)	www.thelearningfederation.edu.au
Australian Qualifications and Curriculum	
Australian Qualifications Framework	www.aqf.edu.au

Australian Curriculum Assessment and Reporting Authority	www.acara.edu.au
--	--

Key Government Departments	
Australian Information & Communications Technology in Education Committee (AICTEC)	www.aictec.edu.au
National Interoperability & Digital Architecture Group (NIDAAG) provide AICTEC with expert cross-jurisdictional & cross sectoral advice on a technical framework to support online learning & the implementation of the DER)	http://www.aictec.edu.au/aictec/go/home/about/cache/offonce/pid/270/
Flexible Learning Advisory Group (provides management support services for the Australian Flexible Learning Framework)	www.flag.edu.au
e-works	www.eworks.edu.au
Federal Government Department of Education, Employment and Workplace Relations	www.deewr.gov.au
TVET Australia	www.tvetaustralia.com.au
Associations/Councils	
E-Learning Association of Victoria	www.elearning.org.au
The E-learning Network of Australasia (EINet)	www.elnet.com.au
Open and Distance Learning Association of Australia (ODLAA) (non-profit organisation that strives to connect professionals to share experiences and disseminate information on open and distance learning. Members are from educational and corporate sector training providers. Also publishes the Distance Education journal which has an international editorial board)	www.odlaa.org
Australasian Council on Open, Distance and E-Learning (ACODE)	www.acode.edu.au
Australian Interactive Media Industry Association (AIMIA)	www.aimia.com.au
Game Developers' Association of Australia (GDAA)	www.gdaa.com.au
Computer Education Groups	
Australian Council for Computers in Education (ACCE) (members are the computer education groups (CEGs) in each state & territory and the Australian Computer Society (ACS)	www.acce.edu.au
ICT in Education Victoria (ICTEV)	www.ictev.vic.edu.au
NSW Computers in Education Group (NSWCEG)	www.nswceg.org.au
Queensland Society for Information Technology in Education (QSITE)	www.qsite.edu.au
The Educational Computing Association of Western Australia (Inc) (ECAWA)	www.ecawa.asn.au
Information Technology Educators Association of the Northern Territory (ITEANT)	www.schools.nt.edu.au/iteant
Tasmanian Society for Information Technology in Education Inc. (TASITE)	www.tasite.tas.edu.au
Computer Education Group of SA (CEGSA)	www.cegsa.sa.edu.au
Computer Education Group ACT (CEGACT)	www.cegact.act.edu.au

Canadian Government Contacts

Consulate General of Canada in Sydney
E-mail: SYDNY-TD@international.gc.ca

Foreign Affairs and International Trade Canada
125 Sussex Dr.

YOUR RATING – WAS THIS REPORT USEFUL TO YOU?

Your Rating				
Not useful at all < > Very useful				
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1	2	3	4	5

***TYPE YOUR COMMENTS ABOUT THIS DOCUMENT AND/OR
SHARE YOUR INSIGHTS ABOUT THIS MARKET IN THE SPACE BELOW:***

Submit