

Ofqual
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Annual Qualifications Market Report

March 2010

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Contents

Foreword	2
Executive summary	4
1. Introduction.....	6
2. Demand for qualifications – participation in education and training.....	9
3. Total qualifications market by number of achievements awarded	15
4. Supply of regulated qualifications – awarding organisations	26
5. Supply of regulated qualifications – qualification types	32
6. Value of the qualifications market and fees	36
7. Distribution of achievements by awarding organisations – GCE and GCSE qualifications.....	41
8. Distribution of achievements by awarding organisations – ‘Other’ qualifications...	44
Appendix 1: Glossary of terms	54
Appendix 2: Achievements for all ‘other’ awarding organisations in England, Wales and Northern Ireland	57
Appendix 3: New awarding organisations recognised in 2008–9	62

Foreword

This report provides an overview of the scale, activity and players within the qualifications market regulated by the Office of Qualifications and Examinations Regulation (Ofqual); the Department for Children, Education, Lifelong Learning and Skills (DCELLS); and the Council for Curriculum, Examinations and Assessment (CCEA). It brings together information already in the public domain into a single document making it more accessible to suppliers and users of qualifications.

The Apprenticeships, Skills, Children and Learning Act 2009 will establish Ofqual as the independent regulator of qualifications, examinations and assessments in England and vocational qualifications in Northern Ireland. The Act sets out five objectives for Ofqual. The efficiency objective requires Ofqual to secure efficiency and value for money in regulated qualifications. As Ofqual develops its approach to regulating efficiency and value for money in the provision of qualifications, this report will, in future years, provide more information on this area of work. Some aspects of this future work are signalled in this year's report.

Transparency in the fees, which enables consumers to make informed choices, could have an important role in providing incentives to those providing qualifications to operate efficiently. In section 6 of this report we present data on a sub-set of GCE and GCSE fees to illustrate the work Ofqual is currently undertaking to understand whether there are steps that could be taken to increase fee transparency.

Ofqual will need to collect economic and financial information in order to meet its efficiency objective. This information will be used to maintain an overview of the market and could trigger specific investigations. The *Annual Qualifications Market Report* brings together information already in the public domain but there are limitations to the information available. The difficulties presented by publicly available data are illustrated in this year's report where we present figures collated from various sources in an attempt to broadly quantify the total value of the qualifications market. Ofqual is also developing a framework for defining markets in the qualification sector in order to understand how competition is operating, as a potential tool for monitoring efficiency issues and as an input into specific investigations should the need arise. The outcome of this work may have a significant impact on the format of future reports by allowing us to publish information on market shares for a sub-set of markets within the overall regulated qualifications sphere.

The Qualifications and Credit Framework (QCF) was fully introduced in August 2008 and this report shows that the number of qualifications within it has grown substantially since then to over 2,600. Ofqual intends to review the fee structures that have been applied to units and qualifications in the QCF to see whether they are transparent and provide the information needed for efficient purchasing decisions. We will also need to review our own regulatory processes for the QCF to see where

we might make them more efficient and effective. We will provide more information on the QCF in future versions of this report.

A handwritten signature in black ink, reading "Fiona Pethick". The signature is written in a cursive, flowing style.

Fiona Pethick
Director of Regulation

Executive summary

This is the third *Annual Qualifications Market Report* produced by Ofqual, the regulator of qualifications, examinations and tests in England, on behalf of Ofqual and its fellow regulators in Wales – DCELLS – and in Northern Ireland – CCEA.

This report provides a useful overview of aspects of the current qualifications market. It covers three areas:

- Information on the demand for qualifications including trends in participation in education and information on achievements awarded by recognised awarding organisations broken down by sector subject area, qualification type and level. We also highlight the high volume qualifications.
- Information on the supply of qualifications including trends in the numbers of suppliers and in the number of accredited qualifications. The report also provides a limited overview of the business characteristics of awarding organisations, and for some reviews their total income.
- An illustrative figure for the value of the market and information on the trends in particular GCE and GCSE fees over time. We provide figures where available for expenditure by learning providers on qualifications.

When considering the supply of qualifications we make a separation between GCE and GCSE qualifications and all other qualifications, which for the purposes of this report we will be calling 'other'. These divisions are based around the way data is available and should not be taken to be indicative of market boundaries.

There are various explanations for the trends in the information provided within this report, and we can observe the following:

- There has been a steady increase in the number of 16- to 18-year-olds participating in education and training. The Year 11 cohort (15-year-olds) in 2008–9 fell from a peak in previous years and was at the level seen in 2002–3. We currently do not have comparable data to present participation in work-based learning.
- In 2008–9, total achievements continued to show an upward trend and this was driven by increases in achievements for 'other' qualifications. GCE achievements remained stable whilst GCSE achievements fell consistently with the smaller cohort size.
- The greatest percentage increase in 'other' qualifications is in the Preparation for Life and Work sector subject area. Level 2 qualifications continue to be the fastest growing level of achievement this year.

- In 2008–9 there were 6.1 million achievements in ‘other’ qualifications, 5.9 million achievements in GCSEs and 2.2 million achievements in GCEs.
- The number of recognised awarding organisations continues to grow and there are now 144 recognised awarding organisations. Twelve new organisations that focus on ‘other’ qualifications were recognised in 2008-9.
- There are a total of 9,708 accredited qualifications on the public National Database of Accredited Qualifications (NDAQ). The number of qualifications that are available for learners will be less than this headline figure, due to dual accreditations of old and new specifications in GCSE and A levels, and the changes in ‘other’ qualifications as awarding organisations prepare for the QCF. There are 8,478 ‘other’ qualifications, 539 GCE qualifications and 691 GCSEs. At least one achievement was recorded for 5,513 ‘other’ qualifications.
- The number of accredited qualifications continues to increase with public policy being a driver and an expansion of qualifications for the QCF.
- There is not an even spread of achievements amongst qualifications. A large majority of qualifications have very low numbers of achievements and a few have a high number. Less than 2 per cent of the total of 8,478 ‘other’ qualifications account for 50 per cent of ‘other’ achievements.
- We do not currently collect data that would enable us to provide a precise view on the total value of the regulated qualifications market, and there is not a single way of measuring this. However the data that is available would suggest a sizeable market and we have included an illustrative estimate of around £1 billion.
- There are small changes in achievement numbers between awarding organisations for GCE and GCSE qualifications.
- The largest seven awarding organisations account for 61 per cent of all achievements in ‘other’ qualifications.

1. Introduction

Purpose of this report

This report has been compiled by Ofqual, the regulator of qualifications, examinations and tests in England, on behalf of Ofqual, DCELLS and CCEA.

This report provides factual information about the qualifications market. It brings together data from several public sources to provide a single reference point about the qualifications market and its participants.

For the purposes of reporting we make a separation between GCSEs, GCEs and all other qualifications. These divisions are based around the way data is available and should not be taken to be indicative of market boundaries. A wide variety of types of qualification is covered by the term 'other' qualifications. They include vocational qualifications¹ and also other qualification types such as basic skills, the Diploma and English for speakers of other languages (ESOL). Appendix 1 shows the full list of qualification types included in 'other' qualifications.

Objectives

This report covers three areas:

- the demand for qualifications – in particular the trends in participation in education and trends in total achievements awarded by recognised awarding organisations
- the supply of qualifications – in particular it presents the trends in accredited qualifications²; the report also provides a limited overview of the business characteristics of suppliers, namely awarding organisations – it reviews their total income and some of their business characteristics
- the value of the market and qualification fees – it reviews the trends in particular GCE and GCSE fees over time; the report also considers the data available to accurately estimate the value of the qualification market.

¹ A qualification is vocational if its primary purpose is to:

- provide learners with knowledge, skills and/or competence directly relevant to work or employment, either within one or more sectors or for specific occupations; and/or
- provide enhanced labour market opportunities for those currently in work or employment.

² Numbers of accredited qualifications are taken from the NDAQ; counts are based on data snapshots taken at specific date points and are at the full Qualification Accreditation Number (QAN) level. Some qualifications allow the learner a choice of units or pathways and these do not count as additional qualifications as they fall under the same QAN.

Scope

The report:

- combines information from several published sources
- covers all regulated qualifications
- focuses on accredited qualifications awarded in England, Wales and Northern Ireland and, unless otherwise stated, refers throughout to figures for these three countries
- looks at recognised awarding organisations: our proposed requirements under the Apprenticeships, Skills, Children and Learning Act allow only awarding organisations that have the appropriate resources, expertise and systems to deliver high quality qualifications to be recognised; recognised awarding organisations must make sure that the knowledge, skills and understanding required by qualifications are fit for purpose and that valid and reliable assessment methods are used
- reviews the information available on the recognised awarding organisations in the public domain
- shows the number of qualification achievements for the different types of qualifications broken down by awarding organisation
- considers the expenditure on qualifications and shows the trends in fees for certain GCE and GCSE examinations
- uses information published or made available for use by the qualifications regulators for monitoring purposes³.

The report explains some of the work that Ofqual is currently undertaking to develop its approach to the economic regulation of the regulated qualifications market.

This report does not:

³ Data on numbers of certificates awarded (achievements) are taken from two sources:

- 'other' qualification data (excluding key skills) covers the period from September to September and are from the Ofqual Statistics Database, which stores certification data provided by awarding organisations on a quarterly basis
- GCE and GCSE qualification data are provided to Ofqual by the Joint Council for Qualifications (JCQ) and cover the summer examination series.

- analyse the non-awarding functions or financial performance of awarding organisations
- comment on awarding organisations' market share based on income, revenue or candidate registrations
- comment on the financial viability of organisations or their efficiency/profitability in relation to awarding
- provide data that are commercially confidential
- analyse qualifications not accredited by the regulators⁴.

⁴ The following link is to a report compiled by PricewaterhouseCoopers on behalf of QCA; within this are data on unrecognised qualifications: www.ofqual.gov.uk/files/pdf_05_2239full_report.pdf.

2. Demand for qualifications – participation in education and training

The demand for qualifications is derived from the demand from those who use them, namely learners, parents, employers and further/higher education gatekeepers. Although demand will originate with these users, the immediate purchasers of qualifications are generally learning providers, including independent training providers, schools and colleges that offer qualifications as part of the learning package they provide to their learners.

In this section of the report we look at the level of participation in education and training within England, Wales and Northern Ireland, as provided by schools, colleges and independent training providers, to see if it has any impact on demand for qualifications. We also illustrate the demand for qualifications by presenting data on the trends in total achievements awarded by recognised awarding organisations.

Participation in education

The tables presented below provide information on the trends in participation in education. To qualify for government funding a qualification must be part of the regulated market. Various factors will influence the level of participation in education such as government initiatives to increase the level of post-16 participation, employers' increased demand for employees with certain qualifications, an individual's desire to pursue a particular vocational route and changes in birth rates influencing cohort sizes.

We would expect that as the level of participation in education or training increases the demand for qualifications would also increase. Due to the nature of the numbers of qualifications that an individual may take we would not expect the increase or decrease to necessarily be proportionate to the participation rate. Any increase or decrease in participation may also impact on the types of qualifications that are being taken. It may be the case that a move from full-time to part-time education would drive a switch from one type of qualification to another and vice versa.

United Kingdom school cohort sizes

We would expect that the most likely school pupils to take qualifications would be those at the end of year 11. The Department for Children, Schools and Families (DCSF) collects data on the number of pupils of each age on an annual basis. The table below shows the number of children aged 15 on 31st August of each year who therefore would be expected to be in year 11 for the following academic year.

Year	2002	2003	2004	2005	2006	2007	2008
Number of children (thousands)	751.2	774.3	764.4	777.3	786	782.8	756.5

Table 2.1: Number of children (in thousands) aged 15 on 31st August each year. Source: DCSF; www.dcsf.gov.uk/rsgateway/DB/VOL/index.shtml

These data are for the whole of the United Kingdom and therefore include Scotland.⁵ Qualifications taken by pupils in Scottish schools would not count towards the qualification statistics that are shown later in this report. These figures show that the number of pupils who were due to leave school in each year has fluctuated over the past seven years and after showing an increase is now back to nearly the levels of 2002–3. We would expect to see the number of qualifications that are taken by this cohort increase and decrease in line with this.

16 to 18 participation in England

In England, participation rates for the 16 to 18 age group are collected by the DCSF, since any learner under the age of 19 has the right to state-funded education or training. It should be noted that this age group covers the three academic years after the age of 16 and will also include some learners who are in university education, which means that although we include them in our population statistics they will not be included in any qualification data as Ofqual does not regulate qualifications in the higher education sector.

The table below shows the number of 16- to 18-year-olds participating in education and training, and the overall population size. The numbers are in thousands and it includes all people aged 16, 17 or 18 on 31st August each year.

	2001	2002	2003	2004	2005	2006	2007	2008*
Total in education and training	1,388,400	1,419,400	1,457,700	1,490,100	1,524,400	1,551,100	1,573,900	1,607,800
Full-time education	1,037,400	1,070,200	1,097,900	1,140,000	1,189,900	1,234,800	1,260,600	1,292,800
Other education and training	351,000	349,200	359,800	350,100	334,500	316,300	313,300	315,000
Not in education or training	459,200	472,800	478,100	479,200	469,200	461,600	443,200	409,800
Population	1,847,600	1,892,200	1,935,800	1,969,300	1,993,600	2,012,700	2,017,100	2,017,600

Table 2.2: Number of 16- to 18-year-olds participating in education. Source: DCSF; www.dcsf.gov.uk/rsgateway/DB/SFR/s000849/SFR12_2009Numbersv2.xls

⁵ Although the data do not have a regional breakdown at each age they do have an overall breakdown of those in secondary education by region. From these data we can approximate that around 10% of all secondary school pupils are in Scotland.

The total of 16- to 18-year-olds in education and training has increased although this is driven by an increase in those in full-time education and a generally falling trend in those in other education and training.

The following chart shows the percentage⁶ of the age group participating in education.

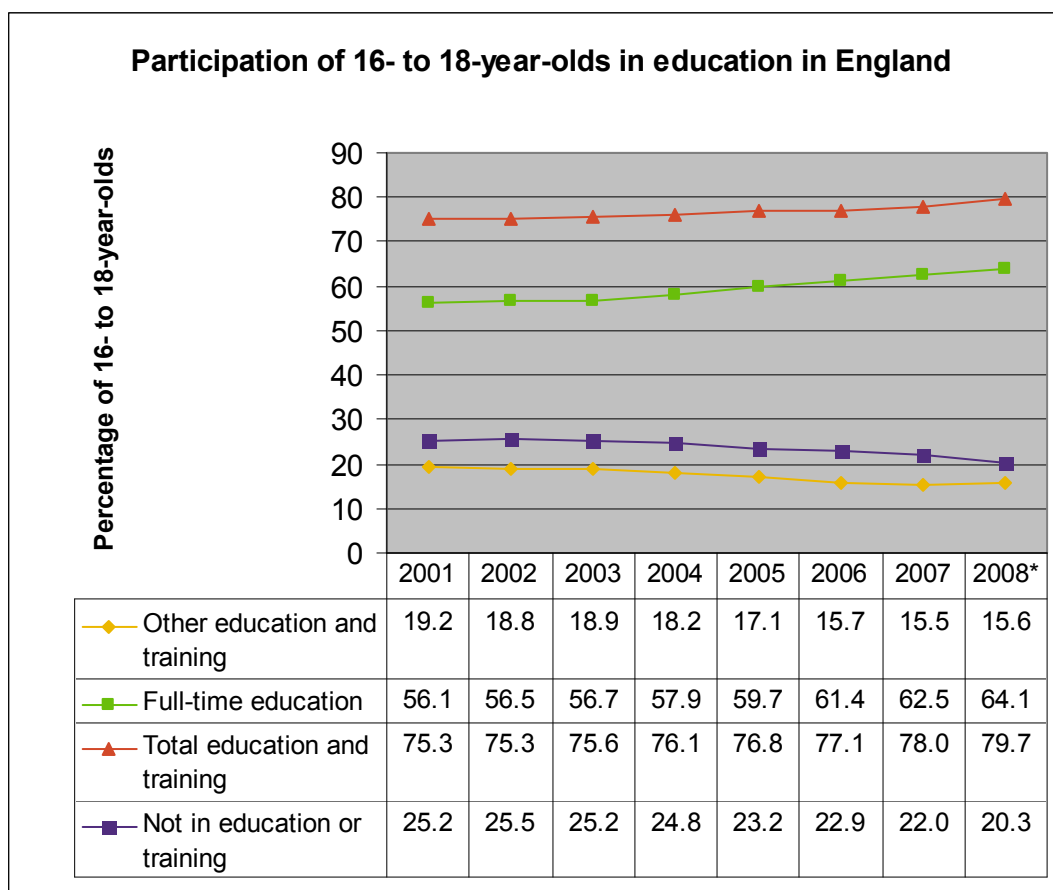


Chart 2.1: Percentage of 16- to 18-year-olds (in thousands) participating in education. Source: DCSF;

www.dcsf.gov.uk/rsgateway/DB/SFR/s000849/SFR12_2009Numbersv2.xls

The above chart shows that despite small increases in 2003 and 2008 the trend in participation in non-full-time education is one of decline.

⁶ Throughout this report percentages may not total 100 due to rounding.

Participation by gender

The data collected by the DCSF is split down into participation by gender. It may be the case that certain types of qualification are more likely to be taken by one gender and therefore the participation rates may influence demand for these qualifications.

Females								
	2001	2002	2003	2004	2005	2006	2007	2008*
Full-time education	534,500	553,100	570,600	594,700	620,300	641,300	652,200	664,800
Other education and training	150,500	151,500	154,400	150,400	140,800	131,000	125,700	128,400
Total education and training	685,000	704,600	725,000	745,100	761,100	772,300	777,900	793,200
Population	895,400	914,000	937,100	957,900	968,200	975,000	976,500	976,300

Males								
	2001	2002	2003	2004	2005	2006	2007	2008*
Full-time education	502,900	517,100	527,300	545,300	569,600	593,500	608,400	628,000
Other education and training	200,500	197,700	205,400	199,700	193,700	185,300	187,600	186,600
Total education and training	703,400	714,800	732,700	745,000	763,300	778,800	796,000	814,600
Population (thousands)	952,200	978,200	998,700	1,011,400	1,025,400	1,037,700	1,040,600	1,041,300

Table 2.3: Numbers of 16- to 18-year-old males and females participating in education. Source: DCSF; www.dcsf.gov.uk/rsgateway/DB/SFR/s000849/SFR12_2009Numbersv2.xls

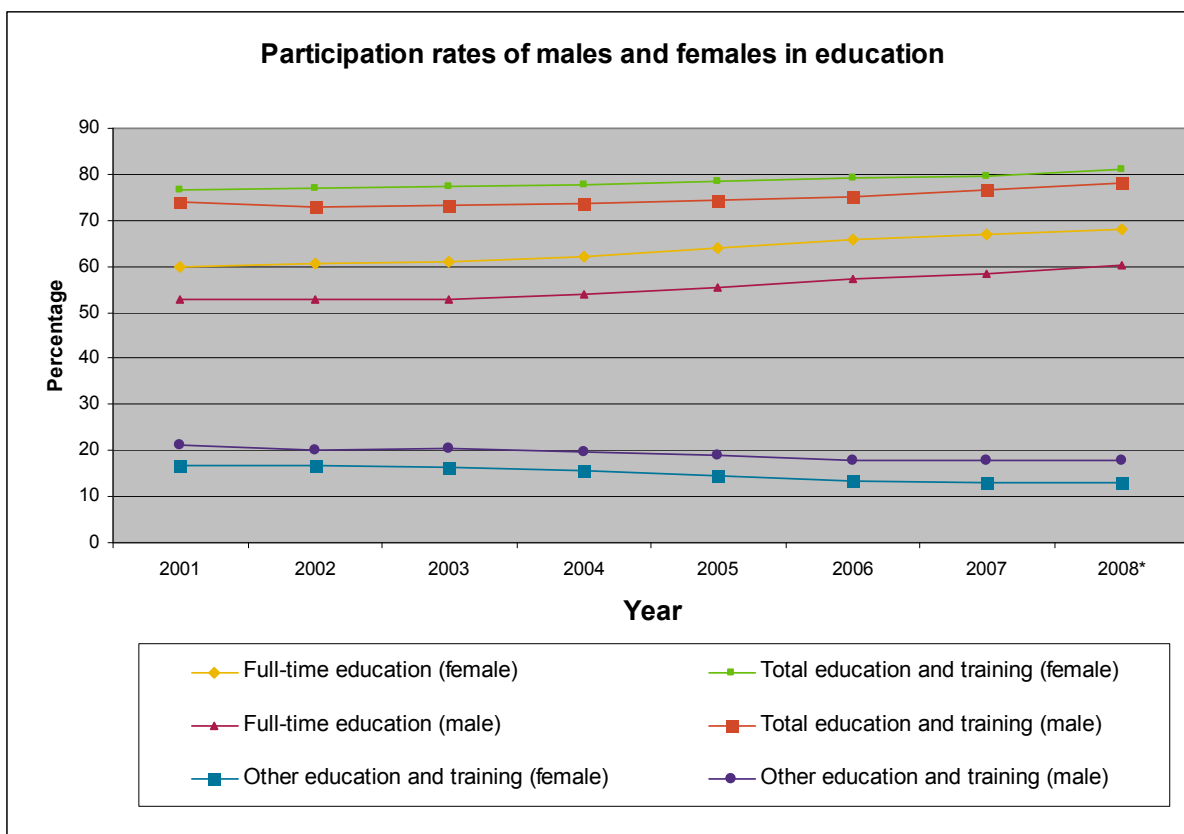


Chart 2.2: Percentage of 16- to 18-year-olds (in thousands) participating in education. Source: DCSF; www.dcsf.gov.uk/rsgateway/DB/SFR/s000849/SFR12_2009Numbersv2.xls

The gender imbalance in education is significant. Although both are on an upward trend, at 68 per cent there is a significantly higher percentage of females in post-16 full-time education than males (60 per cent).

16 to 18 participation in Wales

The Welsh Assembly Government publishes data on participation rates of 16- to 18-year-olds in education. Due to differences in the data sources used this data is not directly comparable to the data for England. However, the trends indicated will be comparable.

	2001	2002	2003	2004	2005	2006	2007
Full-time education	65,000	66,380	67,010	67,560	70,170	71,540	72,650
Part-time education	9,950	10,840	10,360	9,340	9,060	9,770	8,760
Work-based learning	10,800	11,590	11,070	8,970	9,150	8,760	7,660
Population	112,400	115,800	118,100	119,900	121,100	121,900	121,400

Table 2.4: Number of 16- to 18-year-olds, in Wales, participating in education. Source:

<http://wales.gov.uk/docs/statistics/2009/090730sdr1132009en.pdf?lang=en>. Notes: Age is given as of 31st August in the stated year. There is a break in the data series between 2003 and 2004 due to a change in the data source for enrolments in further education institutions and work-based learning resulting in the removal of double counting of work-based learners enrolled at further education colleges.

Again we can see that participation in full-time education is increasing in Wales. There have been a few marginal changes in the overall participation rate; however it has remained fairly constant over the seven years. The most significant change in the participation occurred between 2003 and 2004 but this was due to a change of data source resulting in the removal of double counting of work-based learners enrolled at further education colleges.

Participation by 16- and 17-year-olds in education in Northern Ireland

Participation data for Northern Ireland is collected by two separate departments of the Northern Ireland Assembly – the Department for Education (DENI) and the Department for Employment and Learning (DELNI). There is a lack of published data for the 16 to 18 age group for Northern Ireland; instead we have data for the 16 to 17 age group, as collected by DENI. There is a break in the time series of the data as the way in which it was collected changed. Previously it did not include vocational training outside of the further education sector but from 2005–6 this was included. For this single year data was collected in both formats to allow a direct link to be made. Again, due to differences in classifications and the way the data has been collected, direct comparisons between the Northern Ireland data and that from England and Wales cannot be made. Once again the trends should be comparable across the countries.

	2000-1	2001-2	2002-3	2003-4	2004-5	2005-6	2005-6	2006-7	2007-8	2008-9
Males	65.9%	66.5%	67.0%	68.8%	72.0%	72.3%	80.4%	85.0%	83.7%	82.6%
Females	76.2%	77.2%	77.1%	80.0%	85.2%	87.5%	93.2%	95.1%	92.3%	91.1%
Total	71.0%	71.8%	72.0%	74.3%	78.4%	79.7%	86.6%	89.9%	87.9%	86.8%

Table 2.5 Participation in full-time education in schools and further education colleges in Northern Ireland. Source: www.deni.gov.uk/participation_rates_press_release_update_for_200809.doc. Notes: Before 2005-6 the data excluded vocational training outside the further education sector; after, the data includes this. Data for 2005-6 is presented in both formats to allow cross comparability.

From 2000-1 to 2006-7 the participation rate increased year on year. In the two subsequent years the rate showed a decline.

Work-based learning and post-18 further education

Unfortunately we do not have any data that represented any changes in participation rates in work-based learning. Reports have been published containing information on take up of government schemes such as Train to Gain⁷ which seem to suggest that participation has increased⁸ – but we have no data that can verify this. Reporting on these trends is something that we would like to include in future versions of this report.

General trends in participation

The participation trends for England, Wales and Northern Ireland will be dominated, due to the significantly larger cohort sizes, by the trends for England. The trends clearly indicate that the number of participants in education, aged 16 to 18, has increased every year since 2000-1. However, the number of schoolchildren we would expect to be taking examinations has shown more variance.

⁷ www.traintogain.gov.uk

⁸ www.dius.gov.uk/news_and_speeches/press_releases/adults_gain_qualifications

3. Total qualifications market by number of achievements awarded

In this next section of the report we illustrate demand for qualifications by looking at the number of achievements for each qualification. As of 30th September 2009 the NDAQ⁹ contained nearly 10,000 accredited qualifications. For the purposes of this report we have used the classifications of qualification types, levels and sectors that are assigned to qualifications to investigate them as groups rather than individually. The source of data for GCE and GCSE qualifications¹⁰ is the Joint Council for Qualifications (JCQ) on behalf of its member awarding organisations¹¹. Achievement data for 'other' qualifications are provided to the regulators by awarding organisations and accessed through Ofqual's statistics database¹². All data used are available to the public on request.

Overall picture

The number of achievements in the qualifications market has increased year on year for the past six years. There are a number of factors that will have driven the increased demand, such as increased participation rates, increases in the number of qualifications an individual will take and an increase in the number of qualifications that are accredited.

⁹ www.accreditedqualifications.org.uk

¹⁰ 'GCE and GCSE qualifications' refers to GCSE and GCE A and AS level qualifications and their associated applied variants.

¹¹ Only JCQ results data for the summer series have been presented. In future reports, we will amalgamate the results in the winter and spring series, to present the total for whole year. JCQ members are AQA, CCEA, City & Guilds, Edexcel, OCR, SQA and WJEC.

¹² The only exception to this is in the case of key skills where the data are collected by DCSF. These data are not broken down into the number of achievements for a particular qualification or awarding organisation; therefore we are unable to include it in our analysis of qualification achievements.

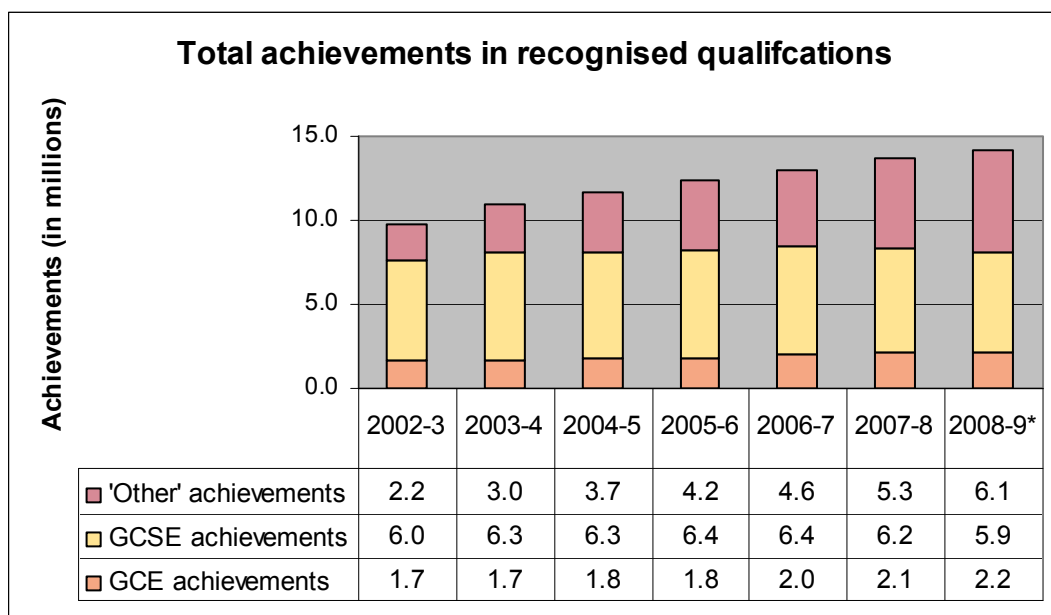


Chart 3.1: Number of achievements in the qualifications market broken down into GCSE, GCE and 'other' qualifications. Source: JCQ June series results, data 2002-9 (* 2009 is provisional) and Ofqual statistics database.

In line with the increased participation rates we can see that the total number of achievements has increased from 9.9 million in 2002-3 to 14.2 million in 2008-9. The main driver for this has been the increased number of 'other' achievements. They have shown an annual rise of 800,000 (15 per cent) between 2007-8 and 2008-9 and the number has nearly trebled from 2.2 million in 2002-3 to over 6 million last year.

Key skills

'Key skills' refer to the skills that are commonly needed in a range of activities in education and training, work and life in general. They are designed to be transferable between different applications.¹³

The following table presents the overall number of key skills achievements from 2000-1 to 2006-7.

¹³ For more on key skills, please see:

www.direct.gov.uk/en/EducationAndLearning/QualificationsExplained/DG_10039028

Year	2000-1	2001-2	2002-3	2003-4	2004-5	2005-6	2006-7
Number of key skills awards (thousands)	114.1	223.0	268.3	333.6	542.9	692.6	730.3

Table 3.1: Number of achievements in key skills from 2000-1 to 2006-7. Source: DCSF key skills data; www.dcsf.gov.uk/rsgateway/DB/SFR/s000783/index.shtml

These data show that there has been a large increase in the number of key skills awarded over the last few years. Key skills are being phased out and we would expect to see the numbers decrease over the next few years.

GCE and GCSE qualification achievements

For this year's report the number of achievements for both GCE and GCSE refers to the main series of examinations in June. The winter series accounts for approximately 3 per cent of total achievements for GCE and 2 per cent for GCSE.

The table below shows the number of achievements at GCE. Due to the increased content of the specifications an applied GCE counts as two achievements. Previous versions of this report did not include data on applied GCEs.

GCE (AS and A2) candidate achievements by year (in millions)							
	2002-3	2003-4	2004-5	2005-6	2006-7	2007-8	2008-9*
Total	1.69	1.70	1.76	1.84	1.97	2.13	2.20
AS	0.95	0.95	0.99	1.05	1.11	1.23	1.27
A2	0.74	0.75	0.77	0.79	0.86	0.90	0.93

Table 3.2: Number of achievements for GCEs. Source: JCQ June series results, data 2002-9 (* 2009 is provisional).

There has been a steady increase in GCE achievements over the last six years, with approximately 2.2 million achieved from last summer series, which represents an increase of 30 per cent since 2002-3.

Achievements at GCSE

The following table provides an overview of achievements at GCSE. It shows that the number of GCSE achievements has shown minor fluctuations but overall has remained reasonably static.

GCSE candidate achievements by year (in millions)							
Year	2002-3	2003-4	2004-5	2005-6	2006-7	2007-8	2008-9*
GCSE achievements	6.0	6.3	6.3	6.4	6.4	6.2	5.9

Table 3.3: Number of achievements for GCSEs. Source: JCQ June series results, data 2002-9 (* 2009 is provisional).

GCSE achievements have decreased in the past two years after four years of growth. This may, in part, be driven by the reduction in the cohort size. Other factors that may have impacted on this decrease include schools offering a wider range of qualifications and a reduction in the number of GCSEs each learner takes.

Achievements in 'other' qualifications

Number of achievements awarded broken down by sector subject area code

Our NDAQ database logs a sector area against each qualification. There are 15 sector subject area (SSA) codes¹⁴. The following table shows the number of achievements (in thousands) in each of these areas.

Number of achievements (thousands)						
Sector	2003-4	2004-5	2005-6	2006-7	2007-8	2008-9
01 – Health, Public Services and Care	760	918	931	925	961	1,015
02 – Science and Mathematics	29	36	31	53	72	96
03 – Agriculture, Horticulture and Animal Care	56	54	55	63	124	90
04 – Engineering and Manufacturing Technologies	152	201	229	262	318	386
05 – Construction, Planning and the Built Environment	82	135	141	176	210	257
06 – Information and Communication Technology	182	280	310	418	506	549
07 – Retail and Commercial Enterprise	246	312	409	372	370	411
08 – Leisure, Travel and Tourism	175	233	258	314	339	420
09 – Arts, Media and Publishing	608	639	683	699	697	766
10 – History, Philosophy and Theology	11	13	10	10	31	42
11 – Social Sciences	7	9	7	4	3	3
12 – Languages, Literature and Culture	87	92	121	192	330	334
13 – Education and Training	69	81	96	96	89	99
14 – Preparation for Life and Work	292	377	603	672	862	1,153
15 – Business, Administration and Law	201	277	333	358	401	497
Totals	2,957	3,657	4,217	4,614	5,313	6,118

Table 3.4: Number of achievements in each sector. Source: Ofqual stats database.

¹⁴ There is currently a review of sector subject areas taking place and changes will be implemented in 2012.

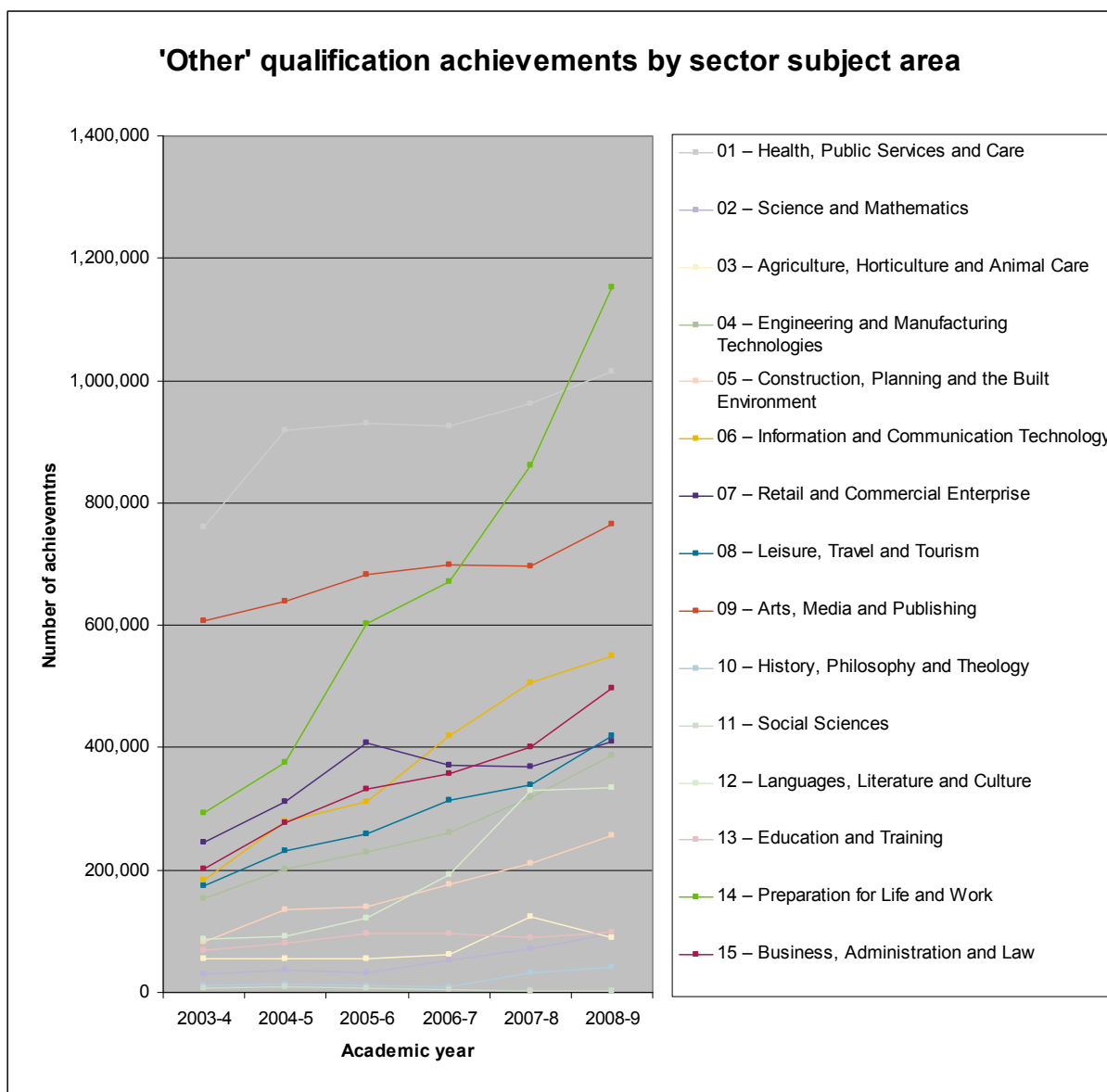


Chart 3.2: Number of 'other' qualification achievements in each sector. Source: Ofqual statistics database.

Since 2003–4 the total number of 'other' qualification achievements has increased dramatically with an increase of 15 per cent in the last year alone.

Achievements by qualification level

Under the National Qualifications Framework (NQF)¹⁵ qualifications are divided into different levels. The following chart shows the number of 'other' qualification achievements at each level.

¹⁵ For information on the NQF's relationship with the QCF please see <http://www.ofqual.gov.uk/qualification-and-assessment-framework/89-articles/145-explaining-the-qualifications-and-credit-framework>.

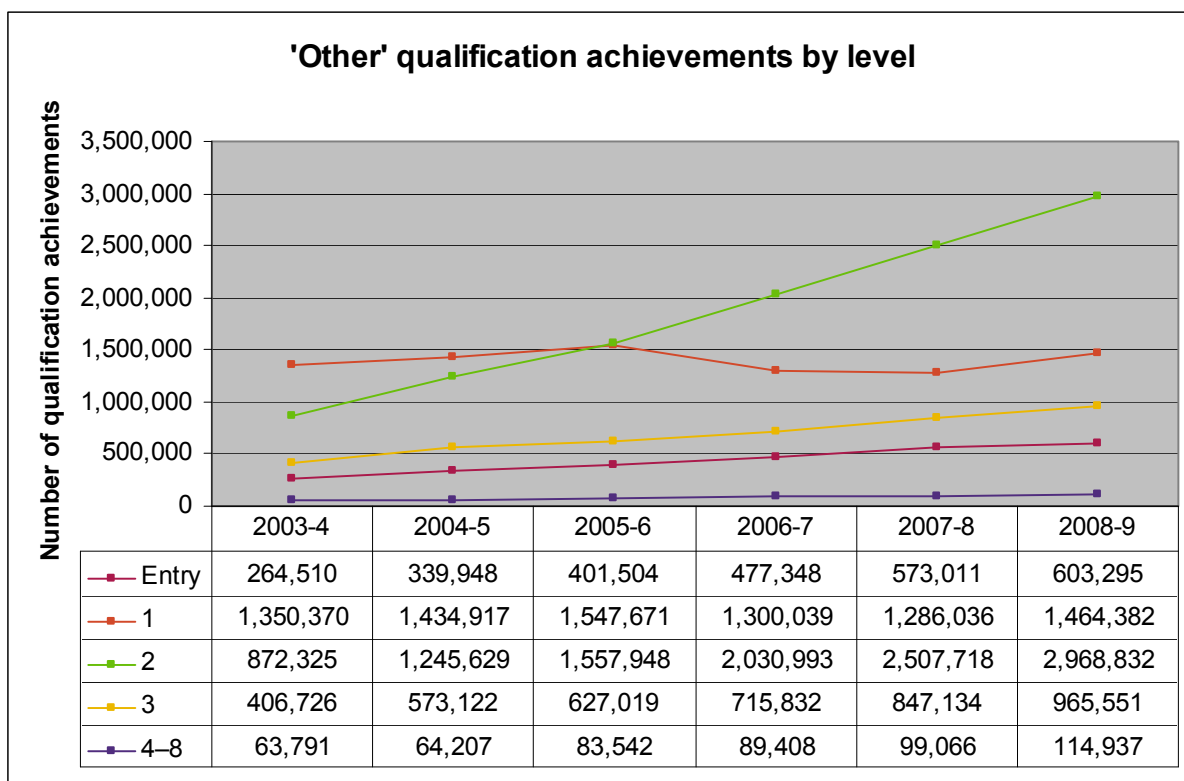


Chart 3.3: Number of 'other' qualification achievements by NQF level. Source: Ofqual stats database.

With the exception of level 1, all qualification levels have shown growth over the past few years. Level 2 qualifications have been by far the quickest growing. Level 1 qualifications dipped from 2005–6 to 2006–7 before recovering to rise again to almost reach their 2005–6 levels in 2008–9.

The increase in level 2 qualifications is consistent with the government's policy that "more than 90 per cent of adults be qualified to at least Level 2 by 2020", which was set out in Lord Leitch's *Review of Skills*¹⁶, published in December 2006, and the associated public policy changes introduced to achieve this target¹⁷.

¹⁶ www.hm-treasury.gov.uk/leitch_review_index.htm

¹⁷ A plan, devised by the Department for Business, Innovation and Skills, for the implementation of the Leitch review can be found at www.dius.gov.uk/reports_and_publications%20HIDDEN/leitch.aspx.

Achievements by qualification type

The different types of 'other' qualifications under the NQF are shown in Appendix 1. This table shows achievements for all 14 qualification types for which there were achievements in 2008–9.

Type	2003–4	2004–5	2005–6	2006–7	2007–8	2008–9
Diploma						170
Principal learning				0	0	616
Project				0	157	11,970
Functional skills				0	21,092	122,404
Basic skills	131,096	192,576	394,204	414,194	505,920	610,944
English for speakers of other languages	171,611	170,996	170,621	184,433	253,507	263,689
Entry level	138,643	186,783	199,179	255,299	331,842	308,100
Free-standing mathematics qualification				17,185	18,507	19,620
Higher level	32,350	28,742	44,555	50,969	52,196	44,657
National Vocational Qualifications	470,119	538,499	598,586	630,419	728,194	920,935
Occupational qualification	14,674	22,427	25,003	26,797	24,507	26,541
Other general	588,923	625,728	693,926	786,829	881,927	950,517
QCF				884	33,690	228,608
Vocationally Related Qualification	1,410,306	1,892,072	2,091,610	2,246,611	2,461,426	2,607,898

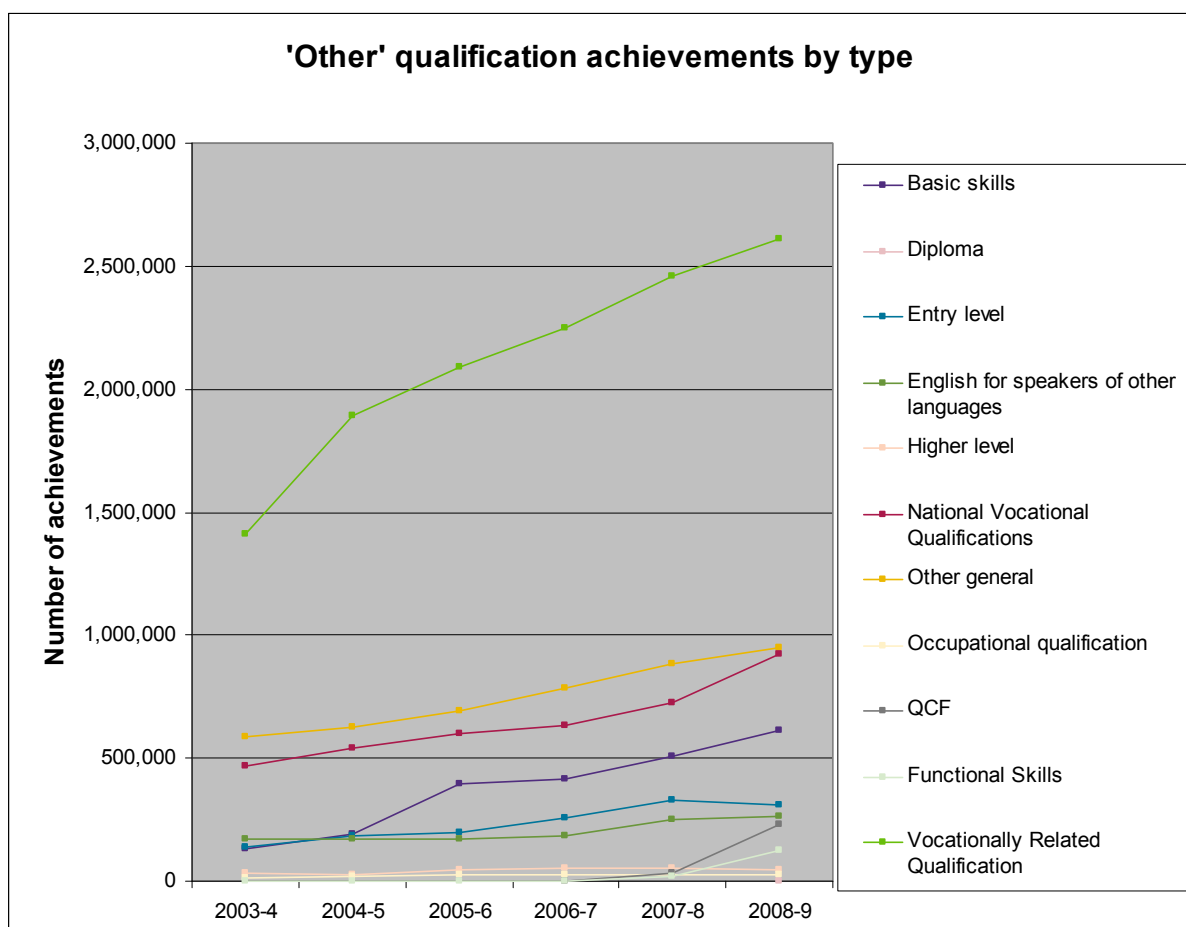


Table 3.5 and Chart 3.4: Number of 'other' qualification achievements by level. Source: Ofqual statistics database.

Since 2003–4 there has been an increase in achievements in these qualification types, except Entry and Higher level. Achievements in Vocationally Related Qualifications (VRQs) continue to have strong growth and make up over 42 per cent of all ‘other’ qualification achievements. In coming years we would expect to see growth from QCF qualifications¹⁸ and the components that make up the Diploma, such as principal learning, the project and functional skills.

Demand for individual ‘other’ qualifications

Although there are 8,478 accredited ‘other’ qualifications¹⁹ demand is not evenly spread over them. The top 20 ‘other’ qualifications account for 23.6 per cent of all ‘other’ achievements. The chart below shows the distribution of achievements across these 20 qualifications.

¹⁸ For more information on the QCF please see <http://www.ofqual.gov.uk/qualification-and-assessment-framework/89-articles/145-explaining-the-qualifications-and-credit-framework>.

¹⁹ For more details on these qualifications please see section 5 of this report: ‘Supply of regulated qualifications – qualification types.’

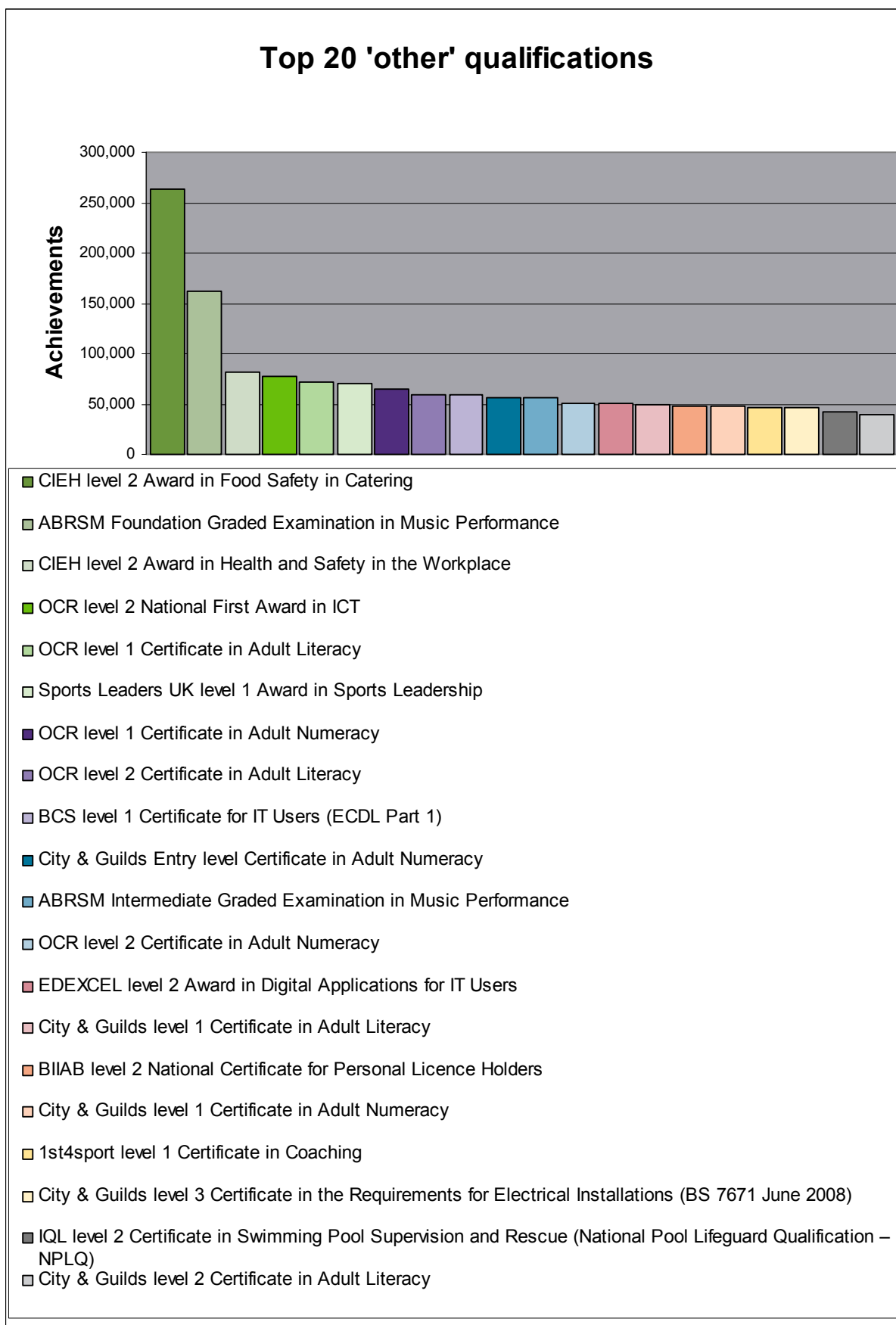


Chart 3.5: Achievements in the top 20 'other' qualifications in 2008-9. Source: Ofqual statistics database.

This chart shows what is the start of a 'long tail' of qualification achievements. The chart below illustrates this even more. This chart excludes the 20 qualifications above and any qualifications that did not award any achievements in 2008–9.

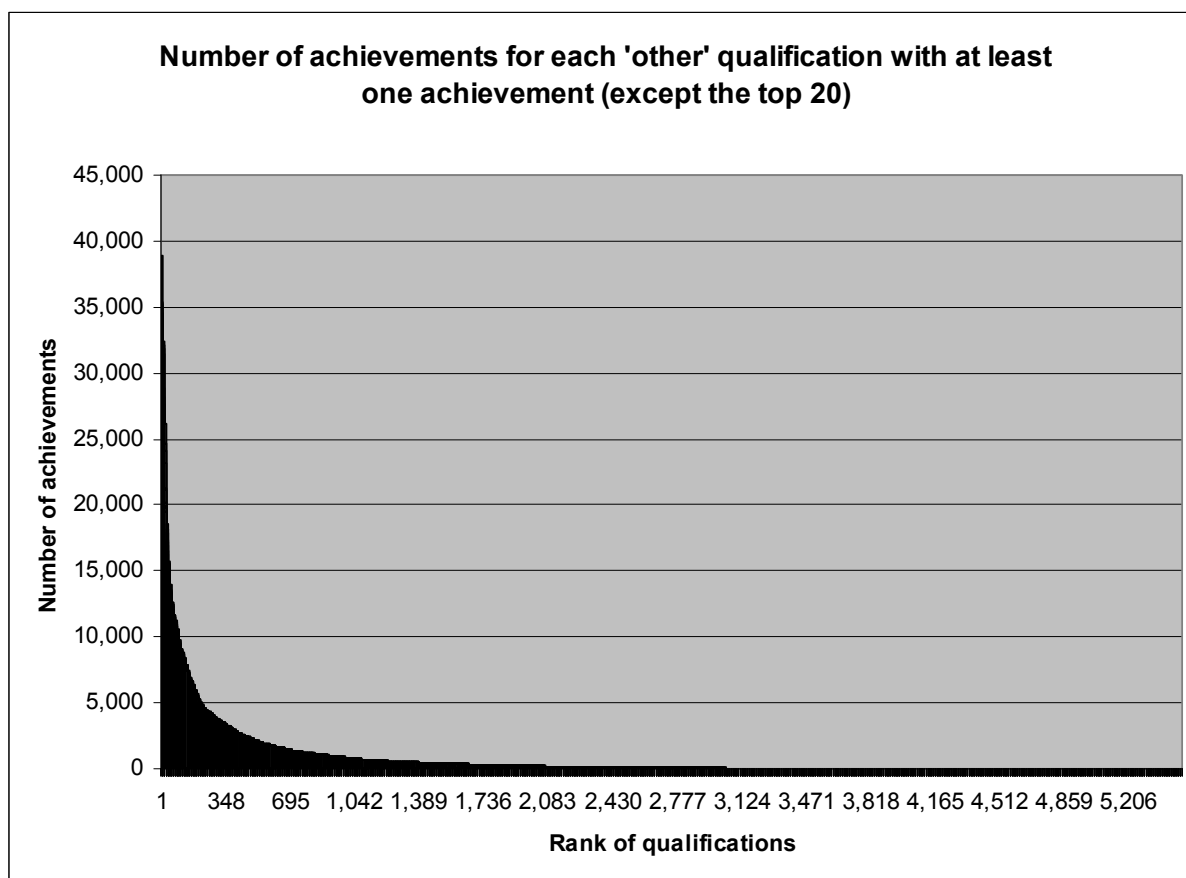


Chart 3.6: 2008–9 achievements in all 'other' qualifications that registered at least one achievement, other than the top 20.

Source: Ofqual statistics database.

These charts show that there are some high volume qualifications and some incredibly low volume ones. As of 30th September 2009 our NDAQ database contained 8,478 accredited 'other' qualifications and 5,513 'other' qualifications recorded at least one achievement. In terms of numbers of achievements:

- One qualification awarded more than 250,000 achievements.
- Two qualifications awarded more than 100,000 achievements.
- 13 qualifications awarded more than 50,000 achievements.
- 111 qualifications awarded more than 10,000 achievements.
- 228 qualifications awarded more than 5,000 achievements.
- 923 qualifications awarded more than 1,000 achievements.

- 2,700 qualifications awarded more than 100 achievements.
- 2,813 qualifications that registered at least one achievement had 100 or fewer achievements.

This concentration of achievements in the most commonly taken qualifications is shown in the next table. The table shows how many qualifications cover a quarter, half, three-quarters and nine-tenths of all 'other' achievements.

Percentage of 'other' achievements	Number of qualifications
25%	23
50%	119
75%	432
90%	1,038

Table 3.6: Number of 'other' qualifications required for each percentage of total achievements. Source: Ofqual statistics database.

From this we can see that half of all 'other' achievements are covered by 119 qualifications – less than 2 per cent of the total of 'other' qualifications. These charts indicate that although there appears to be a large and diverse range of qualifications, demand is highly concentrated on only a small proportion of these.

4. Supply of regulated qualifications – awarding organisations

In this section of the report we focus on the recognised awarding organisations as suppliers of qualifications. The data we present on awarding organisations are available in the public domain.

Number of recognised awarding organisations

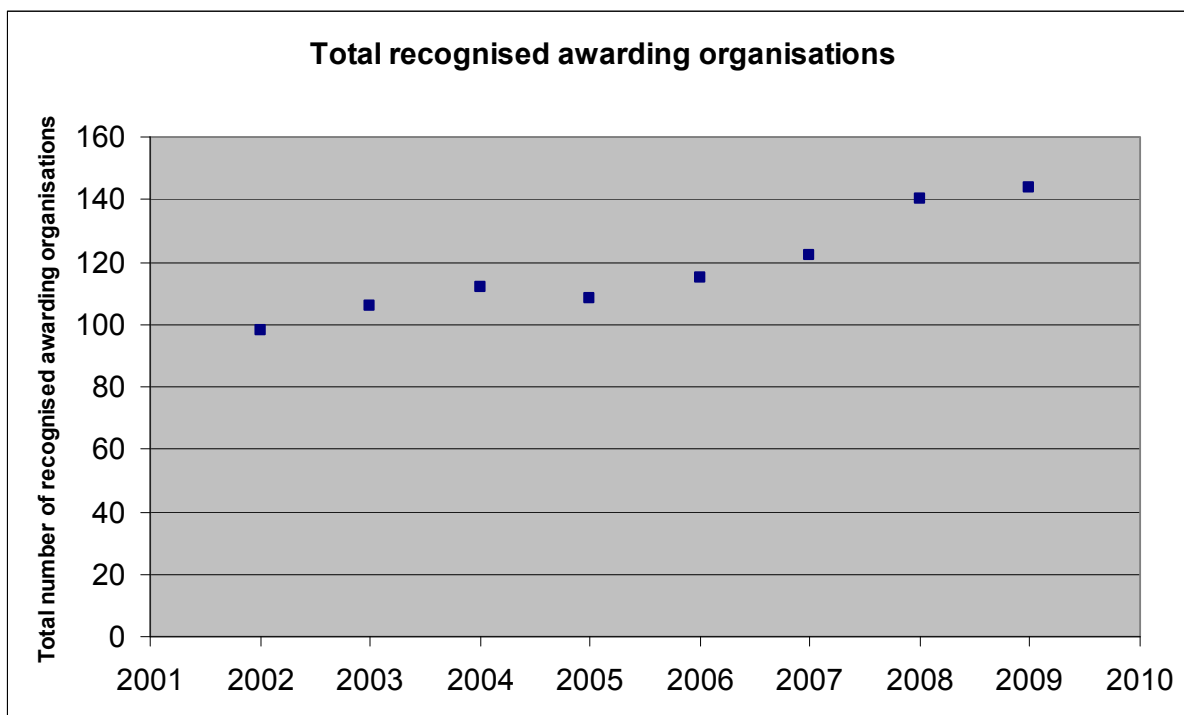


Chart 4.1: Snapshot of the number of recognised awarding organisations taken on 30th September in each year. Source: Ofqual NDAQ database.

The number of awarding organisations recognised by Ofqual has increased steadily in recent years from 98 in 2002 to 144 in 2009. The growth can be attributed to the number of awarding organisations focused on ‘other’ qualifications. Also, since September 2007 employers have been recognised by the regulators as awarding organisations for the first time.

In the period September 2008 to August 2009 there were 12 new awarding organisations recognised. These new organisations are listed in Appendix 3.

General and economic information on recognised awarding organisations

Some awarding organisations undertake activities beyond the delivery of qualifications. Awarding organisations have a wide variety of ownership, financial and constitutional features. Many awarding organisations are private companies and most have limited disclosure obligations; therefore access to disaggregated information about their business activities, costs and profitability is currently relatively limited.

We show income for 16 organisations taken from Companies House.²⁰ We selected the top 20 organisations on the basis of achievements in 2008–9 and financial information was publicly available for 16 of these. The level of disaggregation that is absent from Companies House places caveats to meaningful analysis. Total income²¹ is not a pure measure of turnover from activity relating to regulated qualifications, as it will include any business undertaken that does not limit itself to providing qualifications. There is also income from overseas qualification provision, which is outside the scope of the regulators. This information is limited from a financial analysis perspective and is only a small sample. We have commissioned an independent study to consider what economic and financial information we need to collect to fulfil our regulatory obligations. Future reports may contain further meaningful analysis dependant on the outcomes of this study and consultation with stakeholders.

Income of selected awarding organisations

The table below shows the income of selected awarding organisations as collected from Companies House. This includes income for activities beyond the delivery of regulated qualifications.

²⁰ As a company founded by royal charter, City & Guilds do not need to file accounts with Companies House. They publish an annual report on their website from which we have taken their information.

²¹ Total income is stated in nominal terms and is not adjusted to reflect inflation.

Awarding organisation name	Total income (£ millions)			
	2005	2006	2007	2008
AQA: Assessment and Qualifications Alliance	134.8	138.8	144.9	144.4
Associated Board of the Royal Schools of Music	23.5	24.3	26.0	26.3
BIIAB: British Institute of Innkeeping	8.4	7.2	6.0	5.6
CIEH as part of Chadwick House Group	10.1	10.0	10.5	9.5
City & Guilds	91.5	94.7	97.2	106.2
Council for Awards in Children's Care and Education	6.0	9.5	7.9	8.8
EAL: EMTA Awards Limited	5.2	6.0	7.0	7.3
Edexcel: Edexcel Limited	183.0	202.8	225.0	205.7
EDI: Education Development International plc	13.2	14.2	16.1	21.5
NCFE	6.0	7.0	7.1	7.7
NOCN: National Open College Network	1.5	2.0	2.8	2.6
NPTC	3.5	3.8	4.3	5.1
OCR: Oxford, Cambridge & RSA Examinations	95.1	96.3	106.7	120.8
TCL: Trinity College London	13.9	15.4	17.1	21.2
VTCT: Vocational Training Charitable Trust	6.6	1.5	5.9	6.5
WJEC	22.9	24.8	27.2	29.6

Table 4.1: Awarding organisation income in millions. Source: Published accounts from Companies House. Notes: 1. VTCT income for 2006 is based on a seven-month accounting period and OCR data for 2007 is for a ten-month accounting period. 2. Different organisations have a different accounting year. The data presented for each organisation are for the accounting period ending in the year stated.

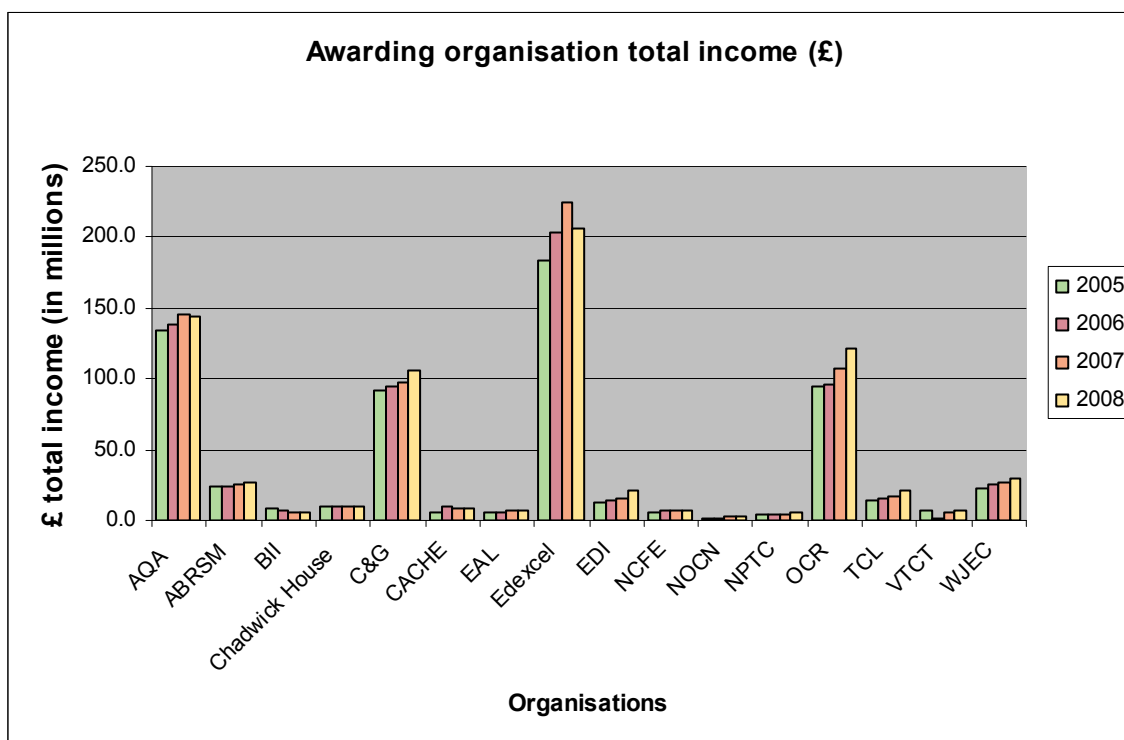


Chart 4.2: Awarding organisation income. Source: Published accounts from Companies House. Notes: 1. VTCT income for 2006 is based on a seven-month accounting period and OCR data for 2007 is for a ten-month accounting period. 2. Different organisations have a different accounting year. The data presented for each organisation are for the accounting period ending in the year stated.:

While total income gives limited information, it does give an indication of the different sizes of the organisations within the market, and year-on-year changes show some market dynamics. Changes in income could have various causes both within regulated qualifications and also from non-awarding business activity.

Awarding organisations' legal status

Using publicly available data, mainly derived from awarding organisations' websites, we have analysed the legal status of recognised awarding organisations.

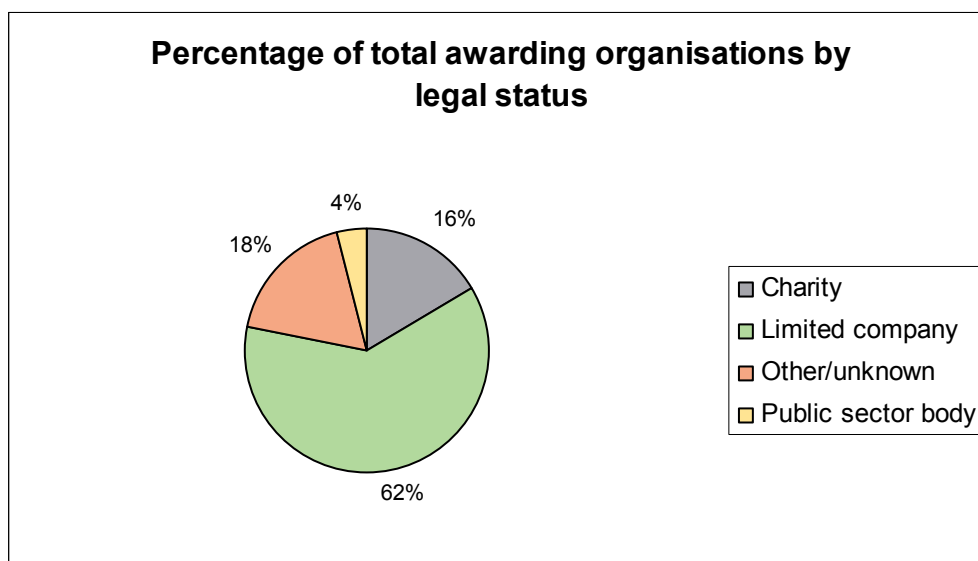


Chart 4.3: Awarding organisations' legal status. Source: Ofqual NDAQ database and searches of organisations' websites.

These data have been aggregated and simplified for the purposes of this report. As there are many different combinations of legal status, assumptions have been made in some cases. For example, while many awarding organisations (62 per cent) are classified as limited companies these statistics hide a number of scenarios; a number of organisations have joint charitable and limited status, some are wholly owned subsidiaries of parent companies, and others are owned by, for example, sector skills bodies. For our purposes, public sector bodies are those classed as non-departmental public bodies, executive agencies or similar. These include the Scottish Qualifications Authority (SQA) and CCEA, which regulate qualifications in Scotland and Northern Ireland, respectively, and are also awarding organisations.

Awarding organisations' primary area of business activity

By examining awarding organisations' websites, we collected information on the nature of their business. The pie-chart below classifies awarding organisations by their primary area of activity.

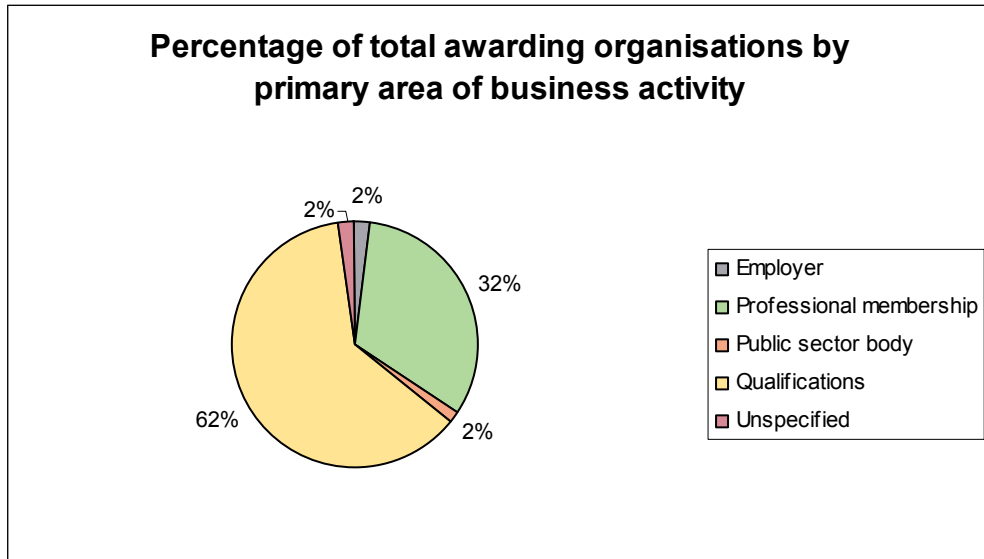


Chart 4.4: Awarding organisations' primary area of business activity.. Source: Ofqual NDAQ database and searches of organisations' websites.

The percentage of organisations that provide qualifications as their core business has increased slightly to 62 per cent (60 per cent last year). Professional membership is the primary business activity for 32 per cent (35 per cent last year), and for those organisations, awarding qualifications may be an 'added value' service.

5. Supply of regulated qualifications – qualification types

In this section of the report we present information on the types of qualifications offered and the trends in the supply of these qualifications.

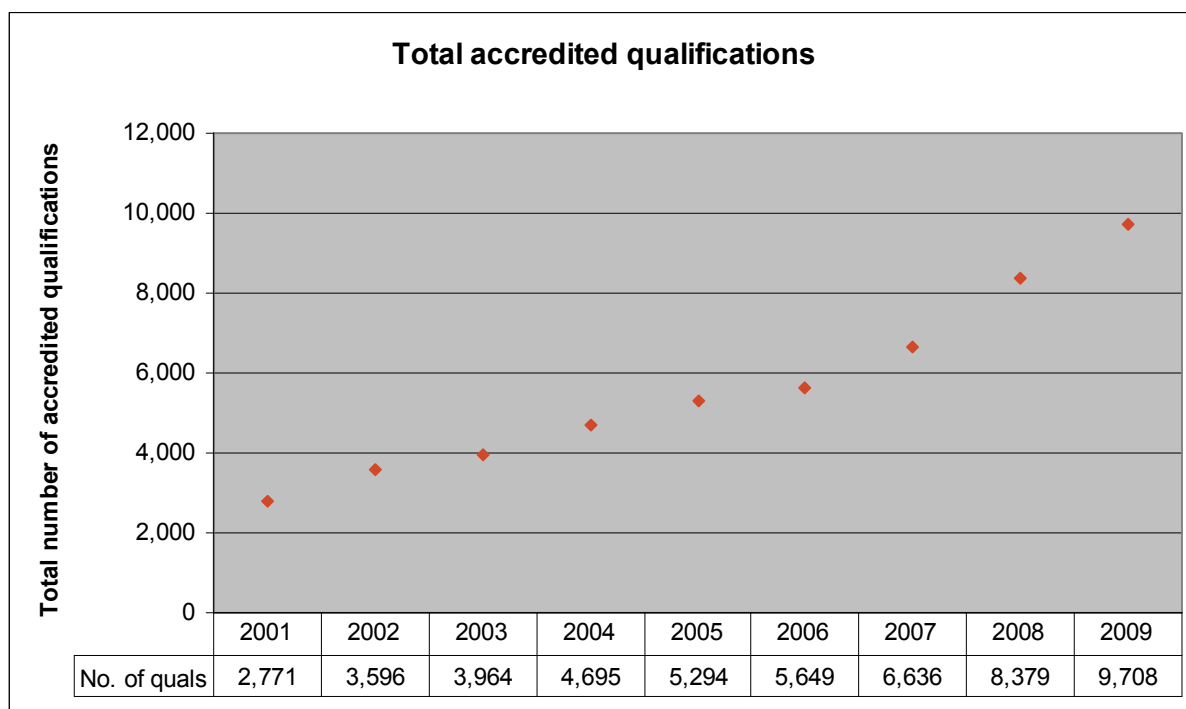


Chart 5.1: Number of accredited qualifications as of 30th September of each year. Source: Ofqual NDAQ database.

There has been a substantial increase of 250 per cent in the number of accredited qualifications from 2,771 in September 2001 to 9,708 in September 2009. Significant factors to this increase are:

- public policy driving new qualifications in England, such as the Diploma and functional skills
- certain duplication with dual accreditation of old specifications²² and new specifications, in GCE, GCSE and in 'other' qualifications where awarding organisations are preparing their portfolio for the QCF while continuing to have a presence in the National Qualifications Framework (NQF).

²² A specification defines the content and structure of a qualification. When a specification is amended or altered to a sufficient degree, the qualification it relates to is usually re-accredited with a new Qualification Accreditation Number (QAN) and new accreditation dates. This may result in two qualifications with identical titles being offered by an awarding organisation for a brief period until the old version expires.

Number of accredited qualifications by qualification type

The following table shows the supply of qualification types at all awarding organisations, at all levels of attainment and length of learning and within each qualification type as recorded on NDAQ.

Qualification type	Sept 2001	Sept 2002	Sept 2003	Sept 2004	Sept 2005	Sept 2006	Sept 2007	Sept 2008	Sept 2009
Advanced Extension Award		17	17	16	18	18	18	19	1
Basic skills	18	38	56	58	72	72	78	78	83
Diploma							68	140	196
Entry level	93	108	115	165	203	272	272	281	275
English for speakers of other languages		43	56	82	103	97	118	141	149
Functional skills							83	84	90
Free-standing mathematics qualification	33	35	35	24	24	12	22	13	22
General Certificate of Education A level	187	188	189	217	258	251	435	452	276
General Certificate of Education AS	195	196	198	226	268	259	444	454	263
General Certificate of Secondary Education	274	331	346	357	376	420	370	688	691
General National Vocational Qualification	119	119	77	75	75	33			
Higher level	3	19	145	266	312	337	367	384	388
Key skills	216	216	216	381	381	360	360	356	356
National Vocational Qualification	1,357	1,340	1,336	1,255	1,221	1,291	1,340	1,345	1,333
Other general qualification	38	121	129	178	244	346	407	585	676
Occupational qualification	17	62	84	91	90	73	78	89	76
Principal learning							36	79	145
Project							14	18	18
Qualifications and Credit Framework qualification (QCF)						5	145	1,034	2,627
Vocational Certificate of Education (VCE)	80	80	80	80	80				
VCE advanced subsidiary level	13	13	13	12	12				
Vocationally Related Qualification (VRQ)	128	666	872	1,212	1,557	1,803	1,981	2,139	2,043
Total	2,771	3,592	3,964	4,695	5,294	5,649	6,636	8,379	9,708

Table 5.1: Number of accredited qualifications of each type. Source: Ofqual NDAQ database.

The table includes qualifications that have now been withdrawn (such as GNVQs) together with the introduction of new qualifications such as the Diploma and functional skills.

- In GCSEs and GCEs, there has been dual accreditation of specifications, with older ones overlapping new. The figure has reduced for GCEs as old specifications have started to expire. Similarly the figures for GCSE are also expected to fall when the old specifications expire in September 2010.
- The impact of the QCF qualification is a strong driver for the increase in total qualifications as shown by the increase from 5 qualifications in September 2006 to 2,627 in September 2009.
- The increase in QCF accreditations appears to be having an impact on the number of other accredited qualifications. With the advent of the QCF, accreditations for NVQs and VRQs will expire as awarding organisations align these qualifications with the QCF and they become reclassified by this qualification type.
- New qualifications related to changes in more recent public policy in England are increasing in number. This includes the Diploma and its constituent parts such as principal learning, functional skills and project.
- Most qualification types, with the exception of expiring ones such as Advanced Extension Award, have shown growth in the number of accredited qualifications in the past decade.

6. Value of the qualifications market and fees

Fees

Information on qualification fees is normally available on awarding organisations' websites but not always in a publicly accessible area and is presented in different formats.

We are currently investigating whether there is sufficient fee transparency in the qualifications market to enable purchasers to make efficient purchasing decisions. A study has been commissioned to explore the rationale and feasibility of developing a standardised comparison methodology for qualification fees and to assess the costs and benefits of publishing qualifications fees in advance. We will consider the outcomes of this study in developing our approach to economic regulation in this area. The five awarding organisations supplying GCE and GCSE qualifications currently voluntarily publish fee information one year in advance.

In this year's report we show the trends in particular GCE and GCSE fees.

The average²³ fee has been calculated from the fees charged by each awarding organisation for certain selected subjects. We have chosen these subjects to present a mix of subjects, including compulsory and most popular, and to cover a range of assessment methods. To ensure that comparable fees are calculated we have taken the most commonly used specification from each awarding organisation and assumed that, where offered, no optional external examiner visits are included and that no late or other fees are payable. These figures have been verified by the awarding organisations.

	Nominal average GCSE fee over time				
	2006-7	2007-8	2008-9	2009-10	2010-11
English	£23.64	£24.46	£25.28	£26.30	£27.41
Maths	£23.64	£24.46	£25.28	£26.30	£27.45
Science	£23.79	£24.60	£26.14	£27.18	£28.23
French	£24.04	£24.88	£25.72	£26.74	£27.89
History	£24.04	£24.88	£25.72	£26.74	£27.93
Art & Design	£23.64	£24.46	£25.28	£26.30	£27.43

Table 6.1: Mean GCSE fee over time. Source: Awarding organisation fee lists, averaged over time.

The above table illustrates that GCSE fees have shown steady year on year growth and that the fees for the chosen subjects are closely aligned.

²³ We have calculated the arithmetic mean of the available fees for the five organisations that award GCEs and GCSEs.

Nominal average A level fee over time²⁴					
	2006-7	2007-8	2008-9	2009-10	2010-11
English Language	£73.20	£75.72	£71.16	£73.77	£76.57
Maths	£73.20	£75.72	£76.68	£79.43	£82.37
Biology	£76.80	£78.66	£77.52	£80.33	£83.29
French	£83.20	£87.56	£85.24	£83.05	£86.17
History	£73.80	£76.32	£71.72	£74.33	£77.13
Art & Design	£79.50	£82.32	£77.64	£80.41	£83.45

Table 6.2: Mean A level fee over time. Source: Awarding organisation fee lists, averaged over time.

GCE fees have fluctuated over the past few years. A levels have seen a structural change. The main change to A levels has been a movement from six-unit specifications to four-unit specifications. Fees for qualifications such as Biology and Mathematics have been more stable, since specifications for these subjects remained at six units. Some awarding organisations operate a flat rate of fees and these were lowered in line with the move to four-unit specifications, including for qualifications that remained at six units.

We will consider the information we report on fees in future reports in line with our developing approach in this area.

Value of the qualifications market

We currently collect data to estimate the value of all of the qualifications market. There are several measures that could be used to provide an indication of the value of the market.

A straightforward method of estimating the value of the market would be to calculate the aggregate value of all awarding organisations' income from providing regulated qualifications. However currently reported revenue often includes revenue from business activities not associated with qualifications and income is not publicly available even in this form for all awarding organisations.

A more bottom-up approach would be to collate the data collected by other organisations on expenditure by learning providers on assessment services provided by awarding organisations. This would require collation of expenditure by all centres including schools, colleges, independent training providers and professional bodies for all regulated qualifications. While some of this data is available, it is not always clear what activities it includes and there are significant gaps. Some of the expenditure may be for services that are not related to the provision of qualifications; for example, the cost of providing invigilation.

²⁴ The fee calculated for an A level is nominal as the course would normally be split over two years with the fees payable taken from different fee lists.

Schools

The DCSF collects information on various types of expenditure within schools including spending on examinations by schools. We would require a detailed breakdown of this spending before we could judge how much is paid to awarding organisations for their different services. It does, however, give us an indicative figure for how much schools spend on qualification fees. These data represent expenditure in England only.

Year	2002-3	2003-4	2004-5	2005-6	2006-7	2007-8	2008-9
Examination fee expenditure (millions)	£154.0	£172.3	£196.8	£218.3	£239.2	£263.3	£281.0

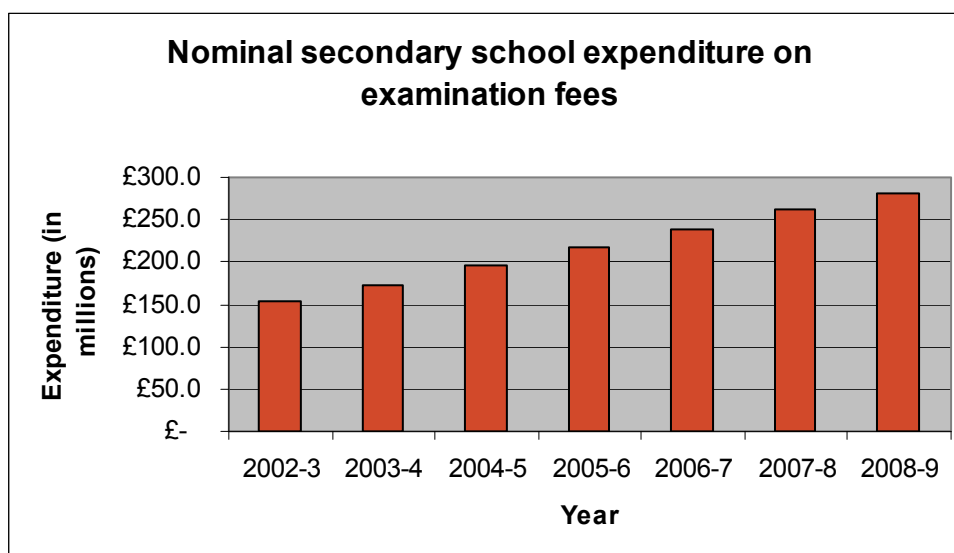


Table 6.3 and Chart 6.1: Secondary school expenditure on examinations. Source: DCSF Outturn data;

www.dcsf.gov.uk/everychildmatters/strategy/financeandfunding/informationforlocalauthorities/section52/dataarchive/s52da

There has been a steady year on year increase in schools' expenditure on what DCSF classify as examination fees from £154 million in 2002-3 to £281 million in 2008-9.

Colleges

The Learning and Skills Council has, until recently, collected data on examination spend by further education colleges. This spend only covers England and it does not cover all colleges as some did not complete their returns.

The last available data, for 2006–7, give a figure of £173 million²⁵ for colleges' expenditure on examinations. Again, a detailed breakdown of this expenditure would be required for extra analysis as it does not state what services have been purchased from awarding organisations and it may include expenditure on peripherals such as invigilation staff wages and examination room hire.

Independent training providers

Unfortunately there is no data available on examination expenditure by independent training providers.

GCSEs

A calculation carried out for our report into the application of the Diploma pricing principles²⁶ provided a weighted average GCSE fee of £25.56 in 2008–9. If we multiply this figure by 5.9 million, the number of GCSE achievements given earlier in this report, we get a total cost of procuring GCSEs of £150 million. This estimate is likely to be low as it relies on old fee information and does not take account of any additional fees, such as late fees or resits, that may be payable.

GCEs

A similar calculation was undertaken in our *Report on awarding body fees for the revised GCE A levels*²⁷, which calculated the average A level fee as £76.08 for 2008–9. If we multiply by the number of A level achievements – 2.2 million, stated earlier in this report – it gives us a value of £169 million. This figure is likely to be lower than the actual value as the fees are calculated on 2008–9 data and it does not allow for other charges such as late fees, resits and external examiner visits.

'Other' qualifications

Given the data we currently collect it is harder for us to estimate a figure using the above methodology for 'other' qualifications. A very crude calculation can be made using the income data for awarding organisations that do not offer GCE and GCSE qualifications and multiplying by their proportion of 'other' achievements. Using City & Guilds, EDI and EAL as examples their total combined income (which will include income from non-qualification sources) is £135 million. Their combined proportion of 'other' achievements is approximately 22 per cent. This would estimate the cost of

²⁵ www.lsc.gov.uk/providers/pfm/financial-support/College+Accounts.htm

²⁶ www.ofqual.gov.uk/files/2009-08-07-application-of-diploma-pricing-principles-report.pdf

²⁷ www.ofqual.gov.uk/files/Report_on_awarding_body_fees_for_the_revised_GCE_A_levels.pdf

procuring 'other' qualifications to be worth £614 million. This estimate is very crude and likely to be higher than the actual value.

Overall value of the qualifications market

Using the latest available figures for schools (DCSF 2008–9 – £280 million) and colleges (Learning and Skills Council 2006–7 – £173 million) we can say for England only the total market is about £453 million excluding fees paid by learning providers, and employers to awarding organisations. Because of incomplete returns this estimate is more likely to be low than high. To this we would need to add the amount paid by independent learning providers before arriving at a total value.

Using the crude estimates for the fees paid for GCSE, A level and 'other' qualifications we come to a combined figure of £933 million. This estimate has the potential to be high or low and should only be taken as an illustrative figure. We would like to improve the quality of the information we can publish in this area and will be taking forward work in this area next year.

7. Distribution of achievements by awarding organisations – GCE and GCSE qualifications

For this report we have broken down the number of achievements by qualification type into two sections. In this section we present information on GCE and GCSE achievements. 'Other' qualifications are considered in the next section. This reflects the way Ofqual currently holds data on achievements; it is not a view of sub-markets. We have commissioned a study to look at market definitions in the qualifications market. Our work in this area may lead to more in-depth market-definition-driven analysis of market segments in future reports.

For GCE and GCSE qualifications the information available shows the number of achievements in the summer examination series.

GCE achievements

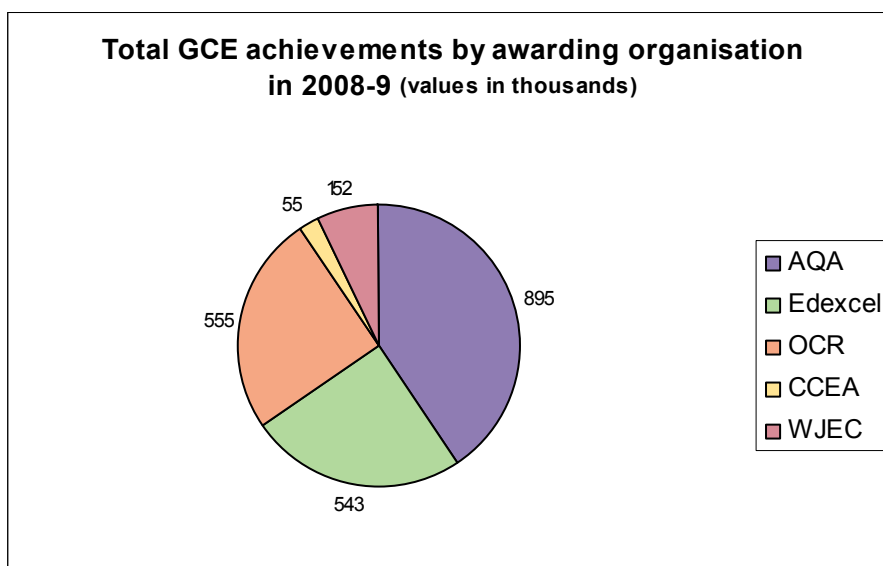


Chart 7.1: 2008-9 GCE achievement data split by awarding organisation. Source: JCQ June series results, data 2008-9 (provisional).

At 41 per cent, AQA awards the largest proportion of GCE achievements, with OCR at 25.2 per cent and Edexcel at 24.7 per cent.

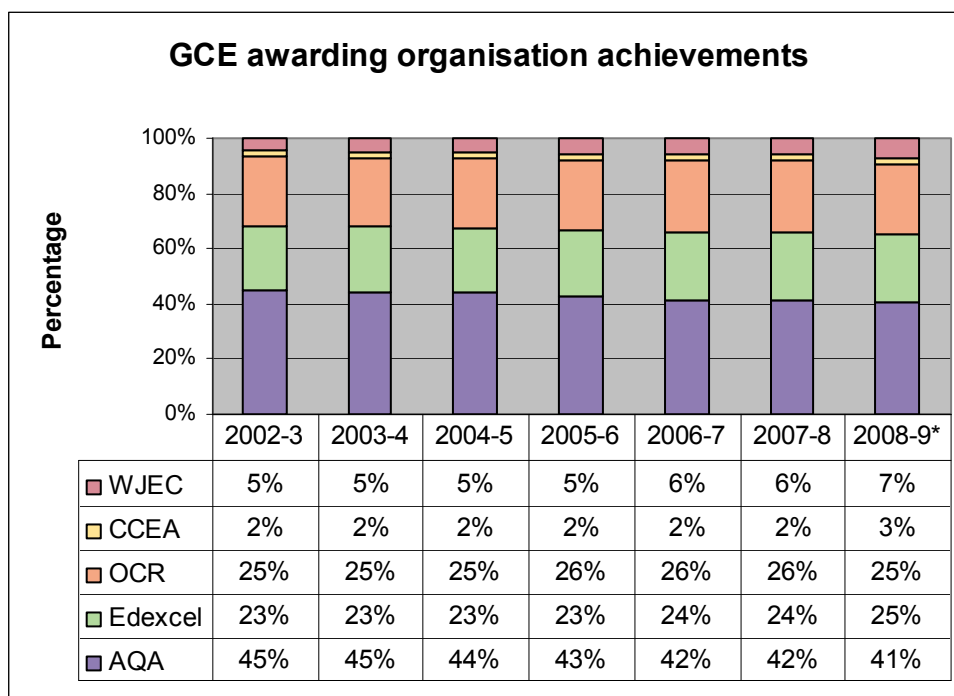


Chart 7.2: 2003–9 GCE achievement data split by awarding organisation. Source: JCQ June series results, data 2003–9 (* 2009 is provisional).

The above chart reviews the yearly trends in GCE achievements since 2002–3. Changes in the distribution of achievements have remained small over this period, with AQA losing 4 percentage points and small gains by WJEC and Edexcel.

GCSE achievements

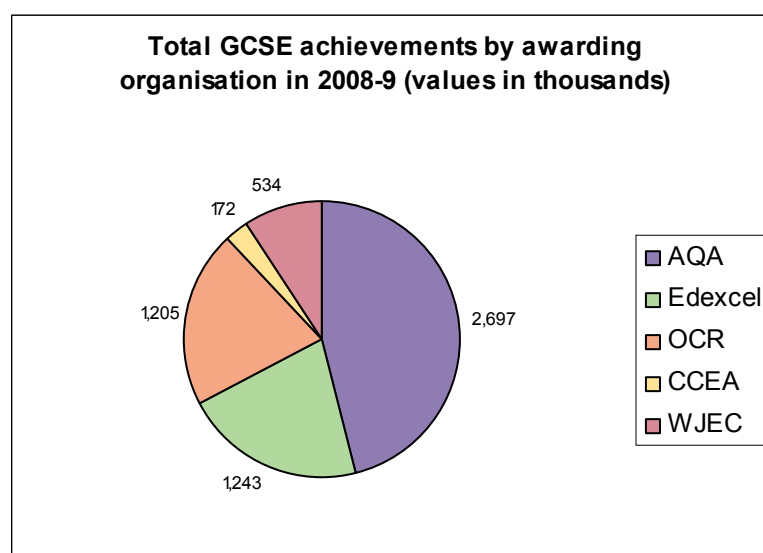


Chart 7.3: 2008–9 GCSE achievement data split by awarding organisation. Source: JCQ June series results, data 2008–9 (provisional).

As with GCEs AQA awards the highest proportion of GCSE achievements at 46 per cent. Edexcel at 21.2 per cent and OCR at 20.6 per cent are closely matched but combined they do not have as many achievements as AQA.

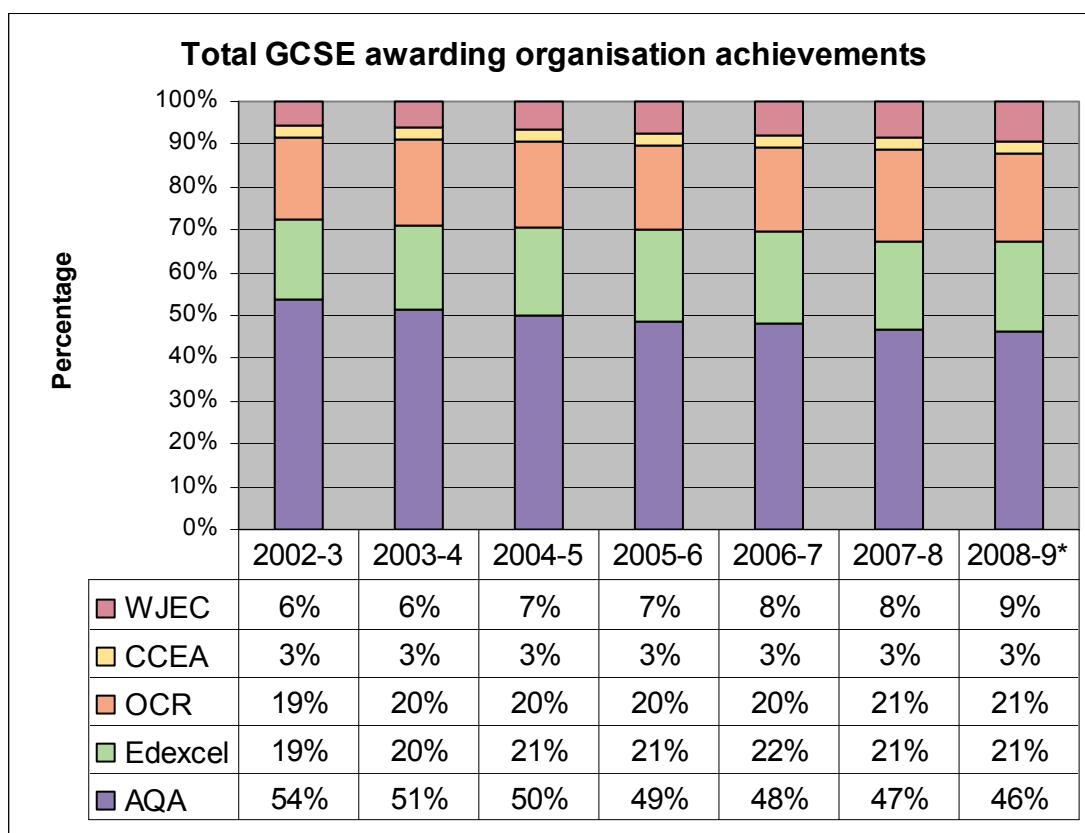


Chart 7.4: 2003–9 GCSE achievement data split by awarding organisation. Source: JCQ June series results, data 2003–9 (* 2009 is provisional).

Although AQA continues to hold the largest share of achievements at 46 per cent, its proportion of achievements has declined by eight percentage points since 2003 whilst Edexcel and OCR have increased by two percentage points. CCEA's proportion of achievements has remained static, while WJEC's has grown by three percentage points.

8. Distribution of achievements by awarding organisations – ‘Other’ qualifications

In this section of the report we focus on awarding organisation achievements for ‘other’ qualifications. Initially we concentrate on total achievements across ‘other’ qualifications. Then we give our attention to awarding organisation achievements for National Vocational Qualifications (NVQs) and Vocationally Related Qualifications (VRQs) since these qualification types are the largest by breadth of qualifications and numbers of achievements.

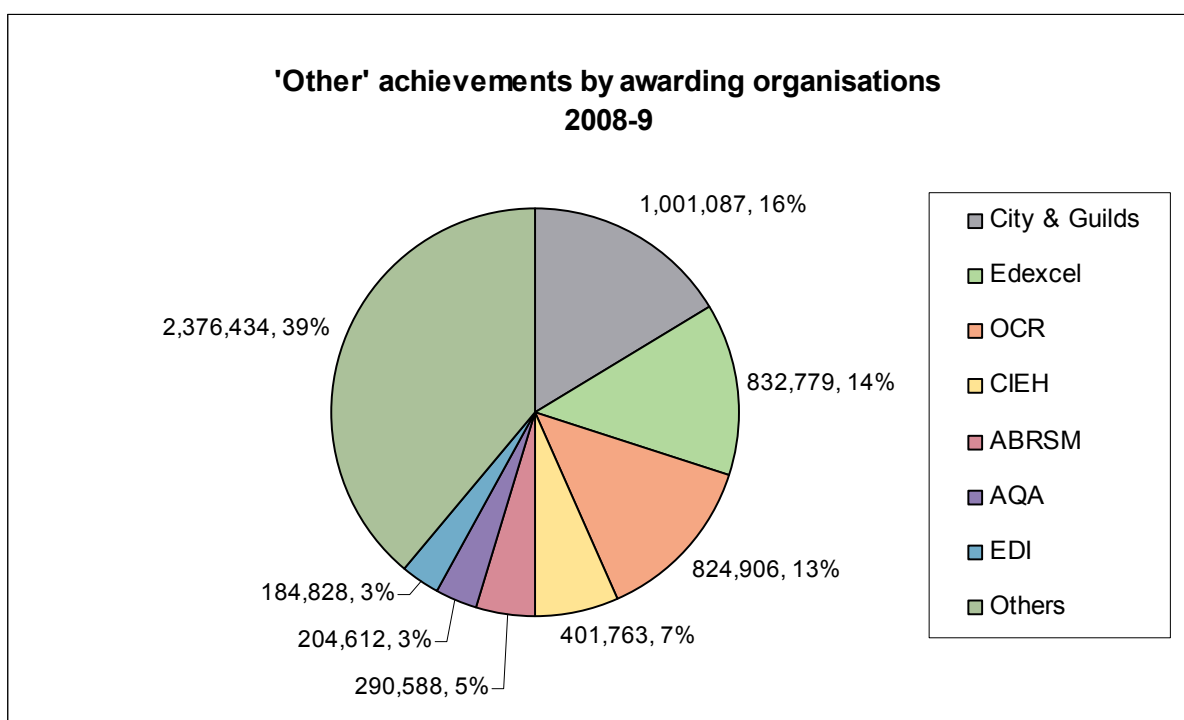


Chart 8.1: Number of ‘other’ achievements by awarding organisation. Source: Ofqual statistics database. Note: The seven largest organisations in terms of achievements are shown.

For the graph above we focus on the seven largest awarding organisations based on the number of ‘other’ achievements. For 2008–9 there were 6.1 million achievements with City & Guilds²⁸ again having the largest share of achievements at 16 per cent. Unlike GCE and GCSE qualifications where the number of awarding organisations is

²⁸ Some awarding organisations are part of the same group of companies. For the purposes of this report the number of achievements relates to each recognised awarding organisation and not to the overall group. The structure of our statistics database does not allow for aggregating these achievements.

small, the number of awarding organisations focusing on the 'other' sector has increased.

The top five awarding organisations in terms of 'other' achievements remain unchanged from last year, with Edexcel moving marginally ahead of OCR in terms of the number of achievements this year. AQA and Educational Development International (EDI) are new entrants to the top seven, with Cambridge ESOL and Construction Skills (CSkills) no longer in the top seven. 'Others', which comprises over 100 awarding organisations, increased their share of achievements to 39 per cent from 37 per cent last year.

There are very few awarding organisations that provide qualifications over a large range of qualification sectors. Indeed most awarding organisations concentrate on specialist subject areas; for example, the Chartered Institute of Environmental Health (CIEH) (7 per cent) and the Associated Board of the Royal Schools of Music (ABRSM) (5 per cent).

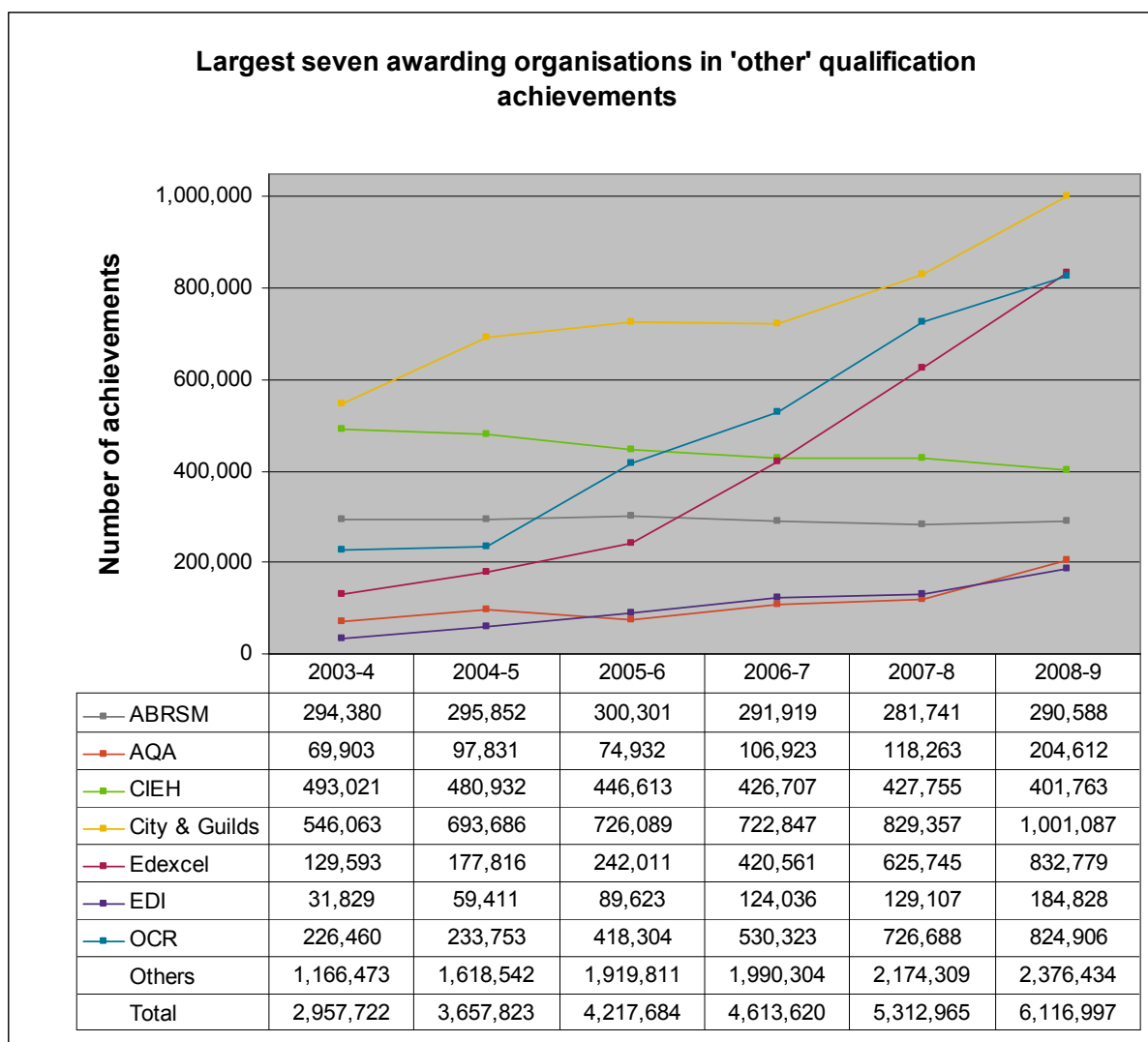


Chart 8.2: The seven largest awarding organisations in terms of 'other' achievements. Source: Ofqual statistics database.

The above table reviews the number of achievements on a year-on-year basis. City & Guilds is still the largest in terms of the number of achievements. Both Edexcel and OCR are continuing their recent large increases in achievements. The gap between these three awarding organisations and the next largest has increased. ABRSM have maintained their number of achievements over the past few years. There has been a strong growth trend by AQA (who are also the largest awarding organisation in GCE and GCSE qualifications) and EDI. CIEH are the only awarding organisation to have a decline in achievements in the top seven.

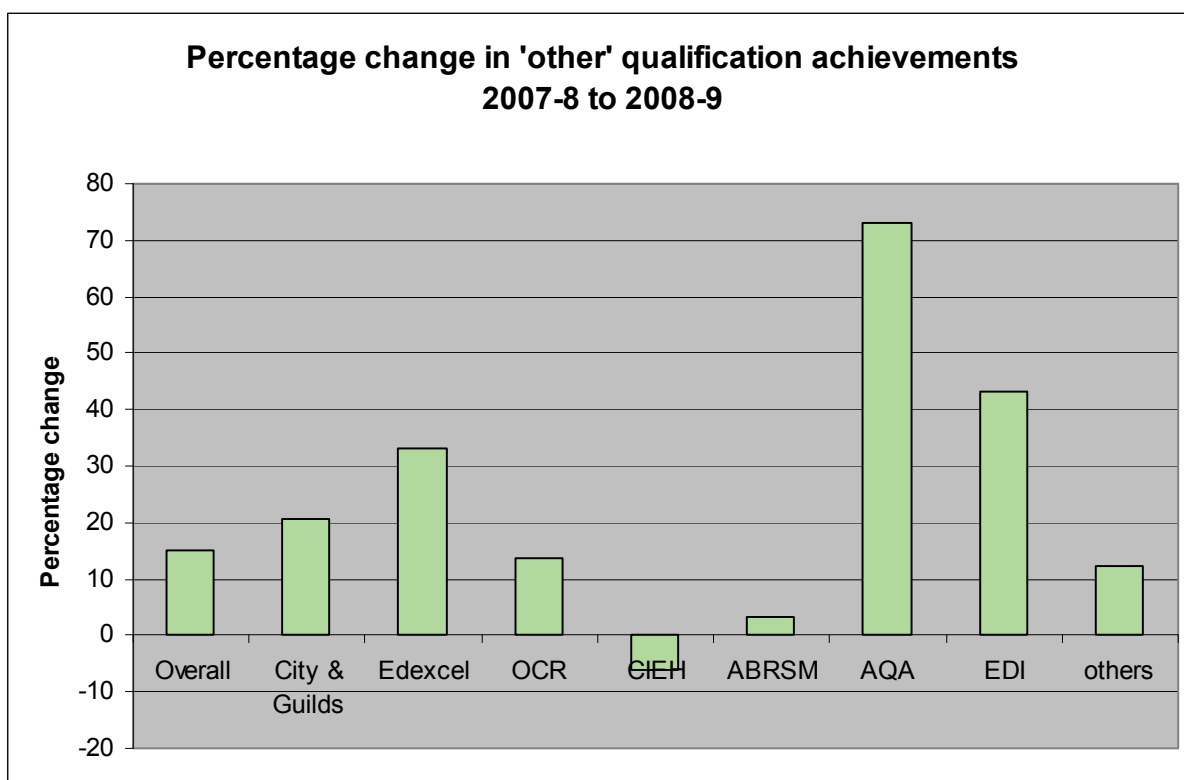


Chart 8.3: Percentage change in number of 'other' qualification achievements for the seven largest awarding organisations from 2007-8 to 2008-9. Source: Ofqual statistics database. Note: Organisations are listed in order of number of 2008-9 achievements from left to right.

The graph above shows the percentage changes, from 2007-08 to 2008-09, in the number of 'other' qualification achievements awarded by each of the seven largest 'other' awarding organisations. The largest three awarding organisations (City & Guilds, Edexcel and OCR) have continued their strong growth of the past few years. There have been small changes in achievements for both CIEH and ABRSM, and the two new entrants AQA and EDI have shown the strongest growth.

The year-on-year increase in the number of achievements for all awarding organisations was 15 per cent. Since 'others' have increased below trend, at 12 per

cent, we can surmise that the growth in 'other' qualification achievements has been driven by some of the largest awarding organisations.

'Other' qualification achievements by medium-sized awarding organisations

The following chart shows the proportion of 'other' qualification achievements for awarding organisations outside of the top seven. The following chart shows the distribution of the 2,376,434 (39 per cent) of achievements classified as 'other' in chart 8.1.

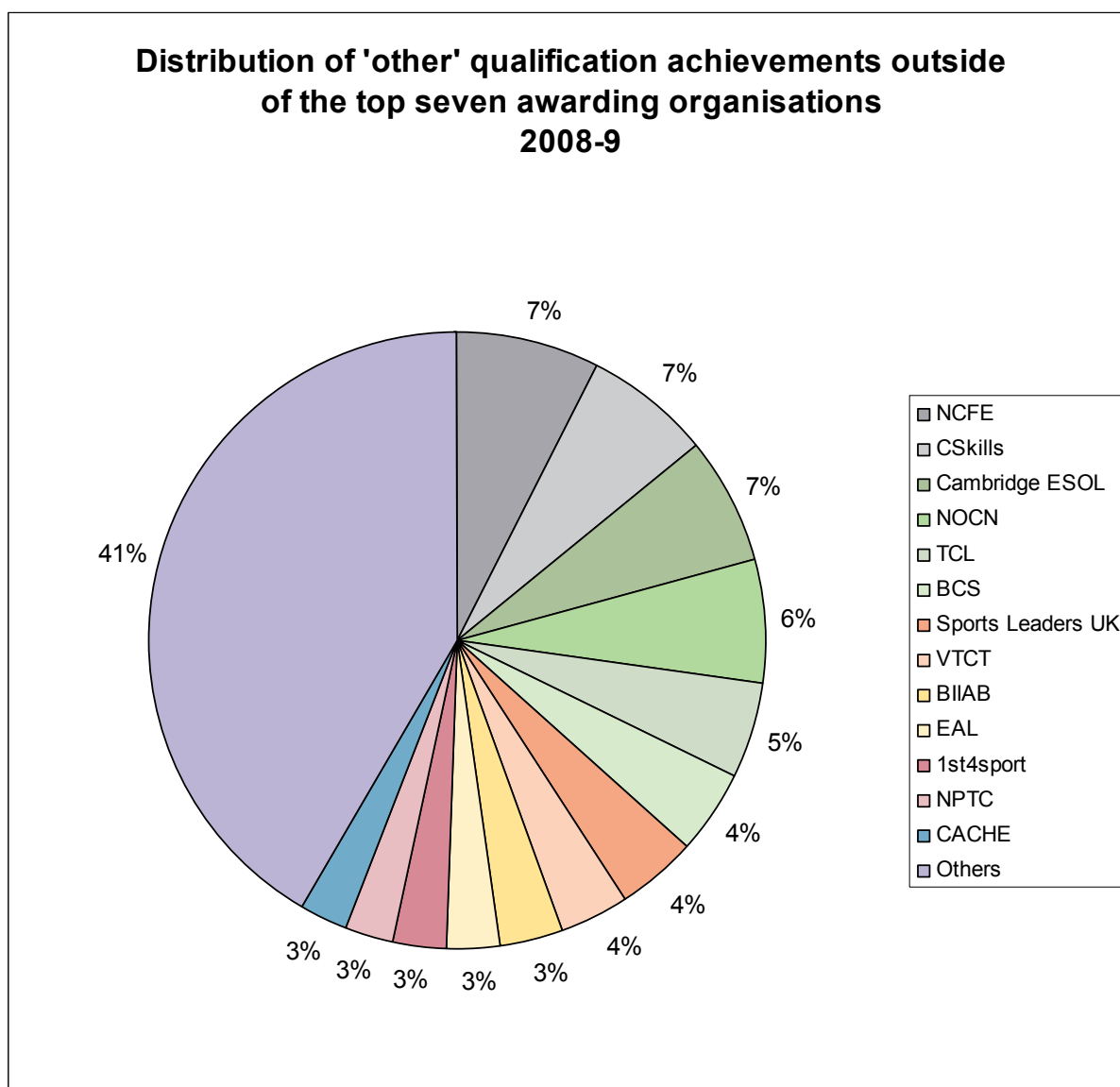


Chart 8.4: Distribution of 'other' qualification achievements outside of the top seven awarding organisations. Source: Ofqual statistics database.

This chart concentrates on the 13 awarding organisations that follow the top 7 previously investigated. This remains consistent with last year's report. AQA and EDI have joined the top seven in terms of achievements, and Imperial Society of Teachers of Dancing (ISTD) is no longer in this group of medium-sized awarding organisations. New entrants are CSkills and Cambridge ESOL, who are no longer in the top seven, and National Proficiency Tests Council (NPTC).

Achievements in National Vocational Qualifications

NVQs are work-related, competence-based qualifications. They reflect the skills and knowledge needed to do a job effectively, and show that a candidate is competent in the area of work the NVQ represents.

NVQs are based on national occupational standards (NOS), which are statements of performance that describe what competent people in a particular occupation are expected to be able to do. The data in this section do not relate to the new qualifications that are being developed for the QCF.

The following table shows the number of achievements in NVQs broken down by awarding organisation.

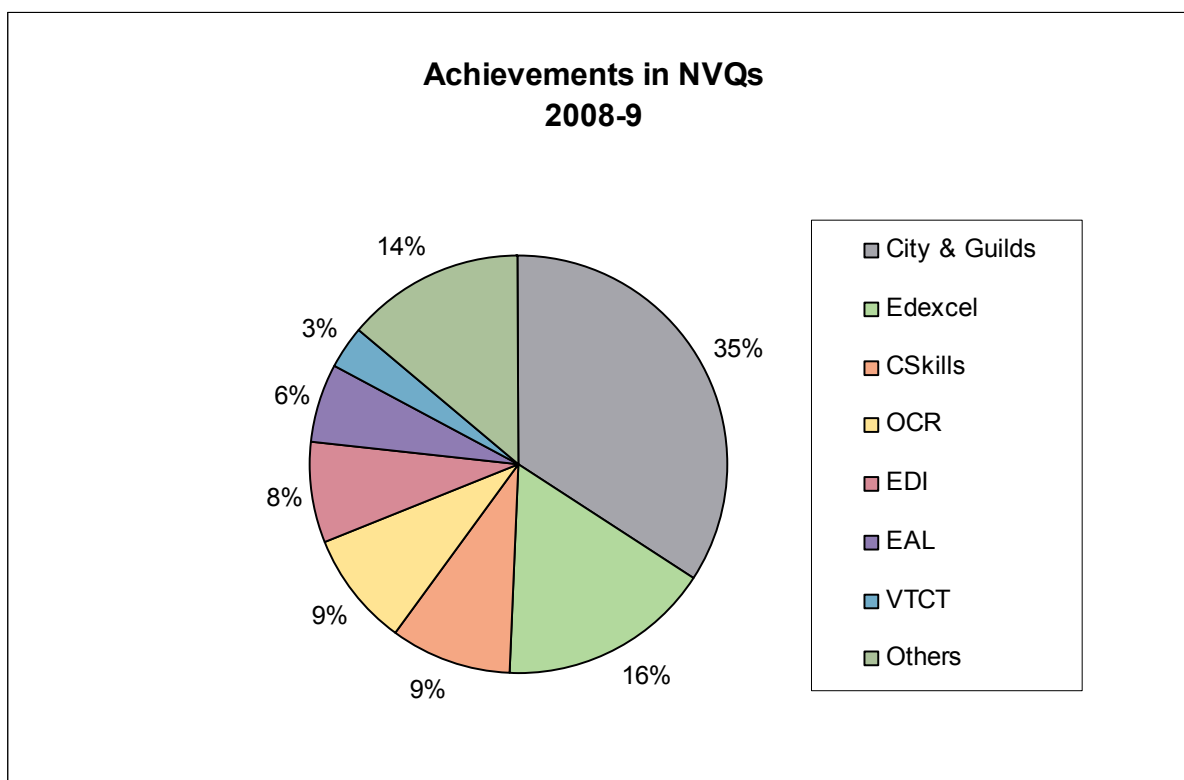


Chart 8.5: Achievements in NVQs broken down by awarding organisation. This shows the seven awarding organisations with the most achievements. Source: Ofqual statistics database.

Two awarding organisations made up over half of achievements for NVQs in 2008–9: City & Guilds have the greatest number, at 35 per cent, followed by Edexcel, at 16 per cent. 'Others' have grown in share from 11 per cent to 14 per cent in the last year.

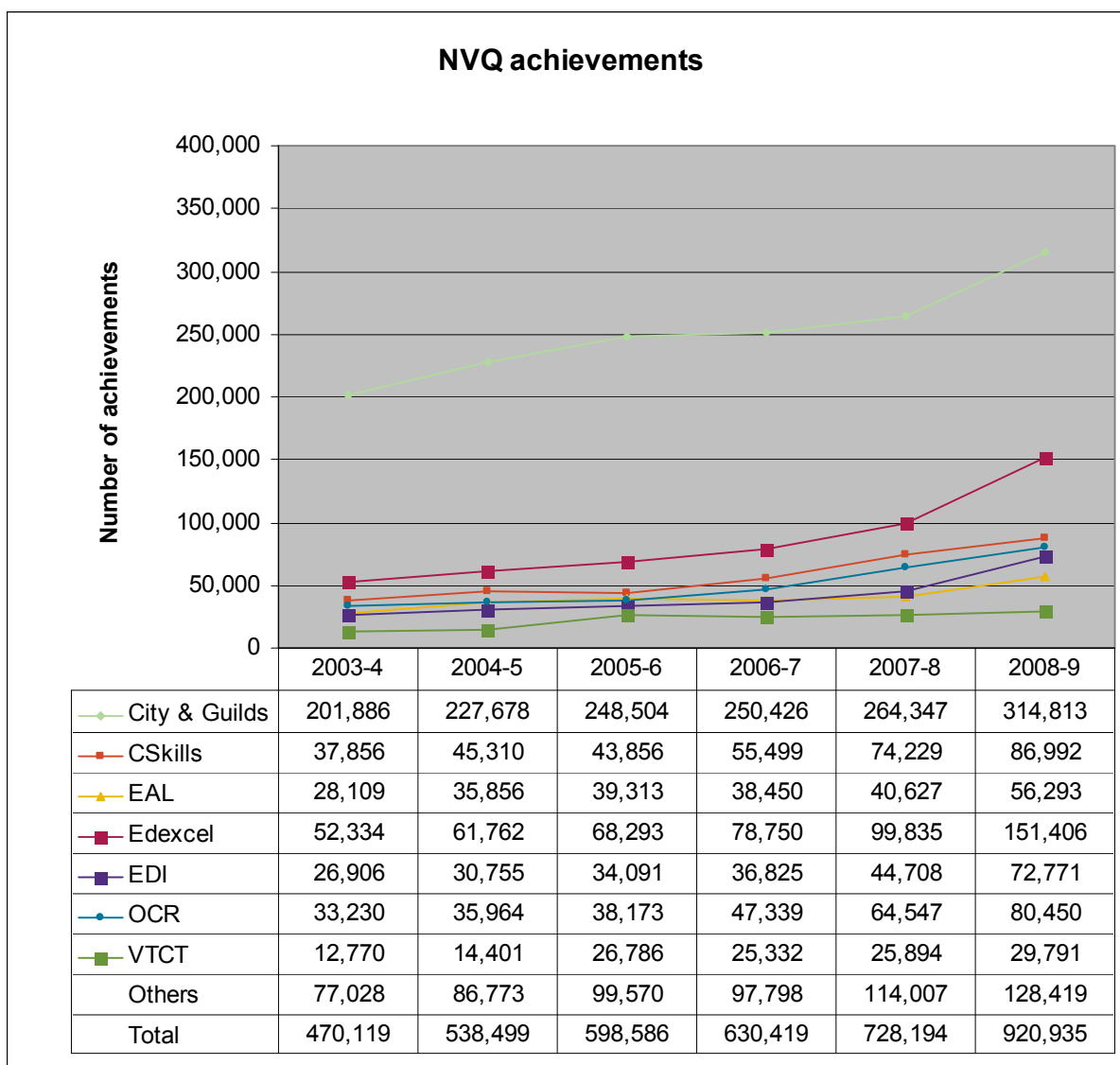


Chart 8.6: Achievements for the seven largest NVQ awarding organisations from 2003–4 to 2008–9. Source: Ofqual statistics database.

The top seven awarding organisations have all shown increases, with City & Guilds and Edexcel showing the greatest increase.

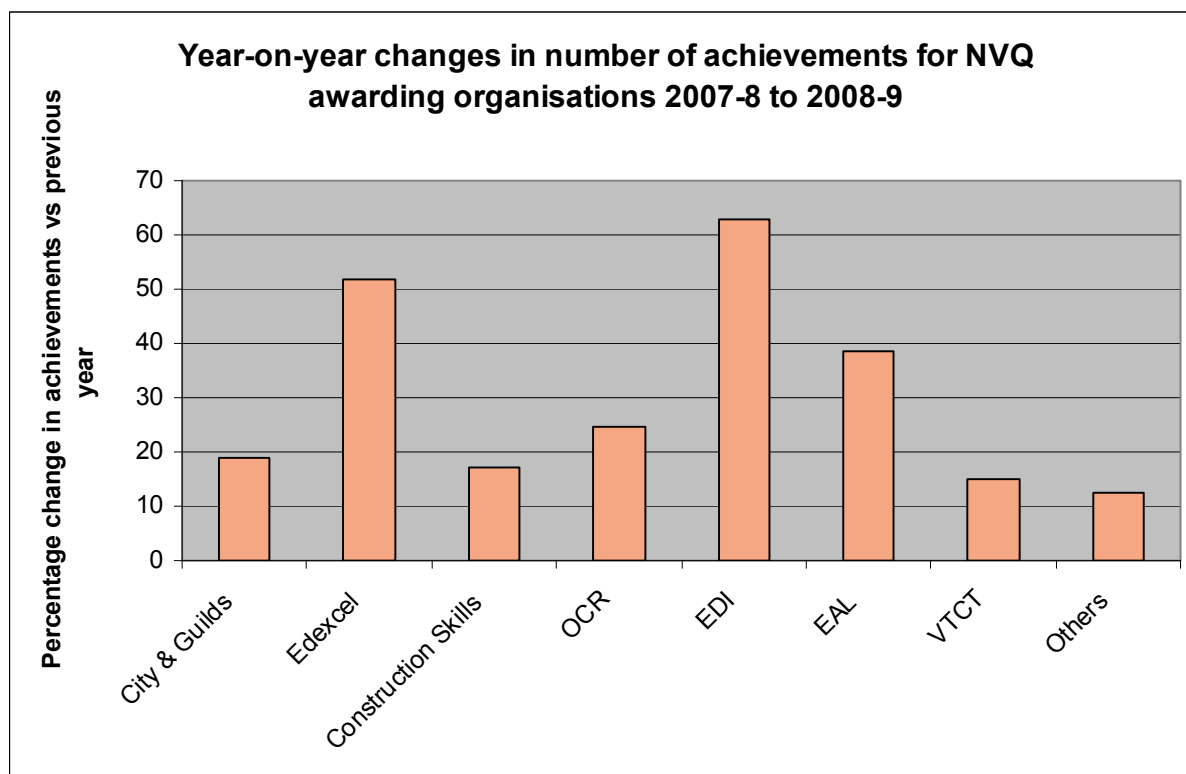


Chart 8.7: Percentage changes in number of achievements in NVQs. Source: Ofqual statistics database. Note: Organisations are ordered from left to right in terms of their overall number of achievements in 2008-9.

The graph above shows the year-on-year changes for the seven awarding organisations with the most NVQ achievements. The average increase across all awarding organisations was 26 per cent. Similar to all 'other' qualification achievements the 'others' have increased below trend at 13 per cent. Again the increases in the largest awarding organisation achievements have been the main driver in the growth of NVQ achievements.

Achievements in Vocationally Related Qualifications (VRQs)

A qualification is vocational if its primary purpose is to provide learners with knowledge, skills and/or competence directly relevant to work or employment within one or more sectors or for specific occupations and/or provide enhanced labour market opportunities for those currently in work or employment, for example social care or health. VRQs are available at all levels of the NQF and can be studied at college, in the workplace or through distance learning. In achievement terms, VRQs are responsible for over 42 per cent of 'other' qualification achievements.

The following pie chart shows the number of achievements in NVQs broken down by awarding organisations.

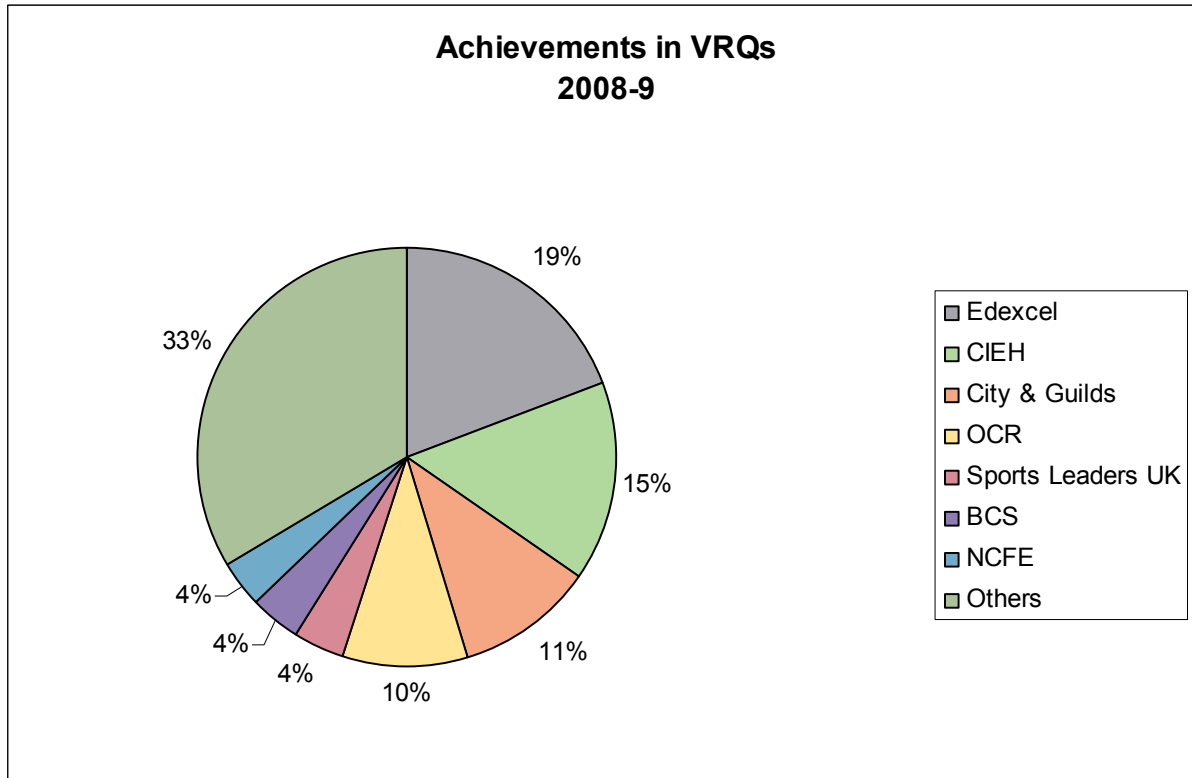


Chart 8.8: Achievements in VRQs broken down by awarding organisation. Source: Ofqual statistics database. Note: This shows the seven awarding organisations with the most achievements.

Edexcel had the largest share of VRQ achievements at 19 per cent (15 per cent last year), overtaking CIEH whose share of achievements has fallen to 15 per cent (from 17 per cent last year).

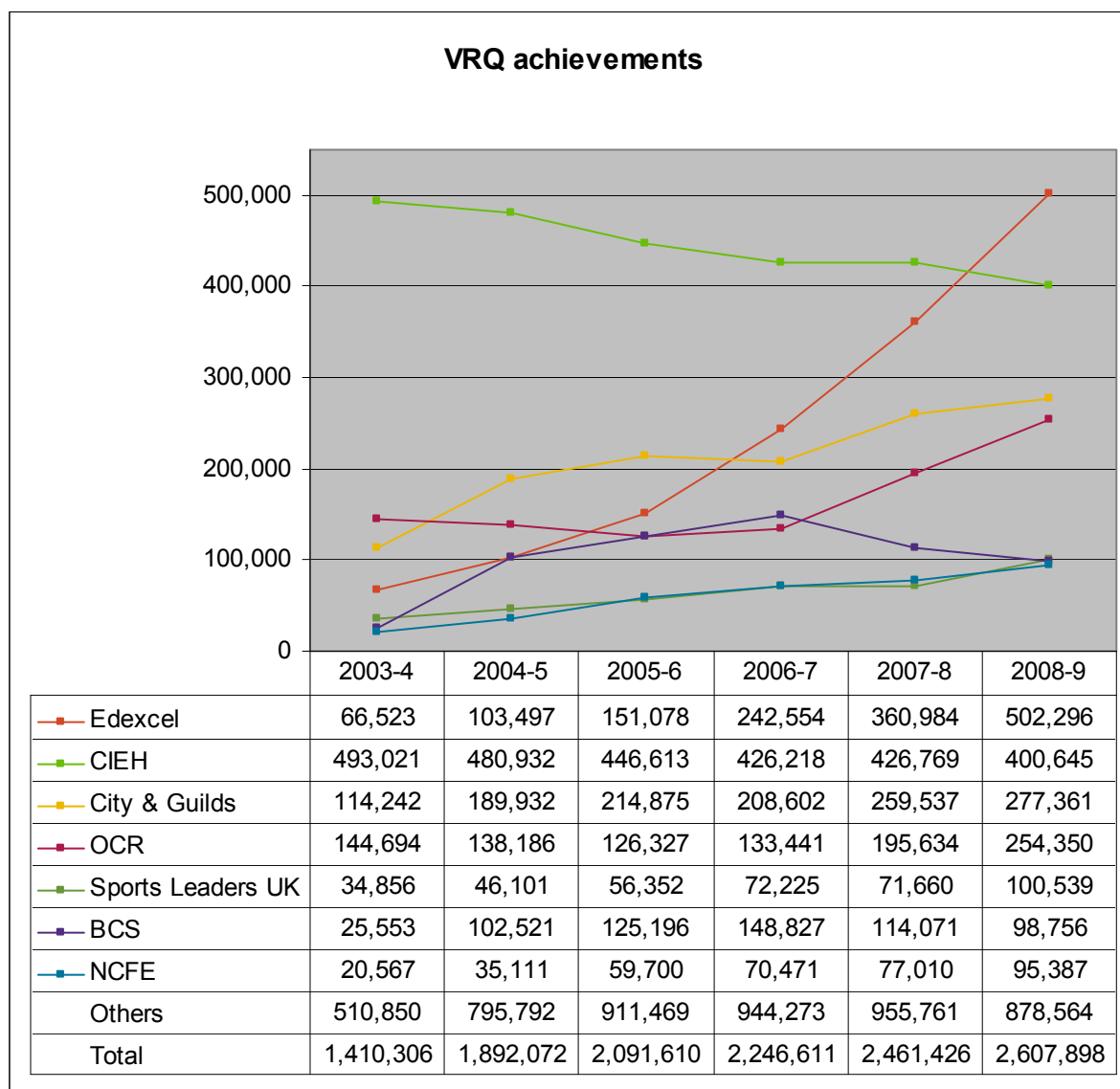


Chart 8.9: Achievements for the seven largest VRQ awarding organisations from 2003-4 to 2008-9. Source: Ofqual statistics database.

Edexcel has shown a dramatic increase of over 750 per cent in achievements of VRQs since 2003-4 and now is the largest in terms of achievements. CIEH is the only awarding organisation to have shown a fall in achievements in the past five years out of the top seven organisations by share of achievements.

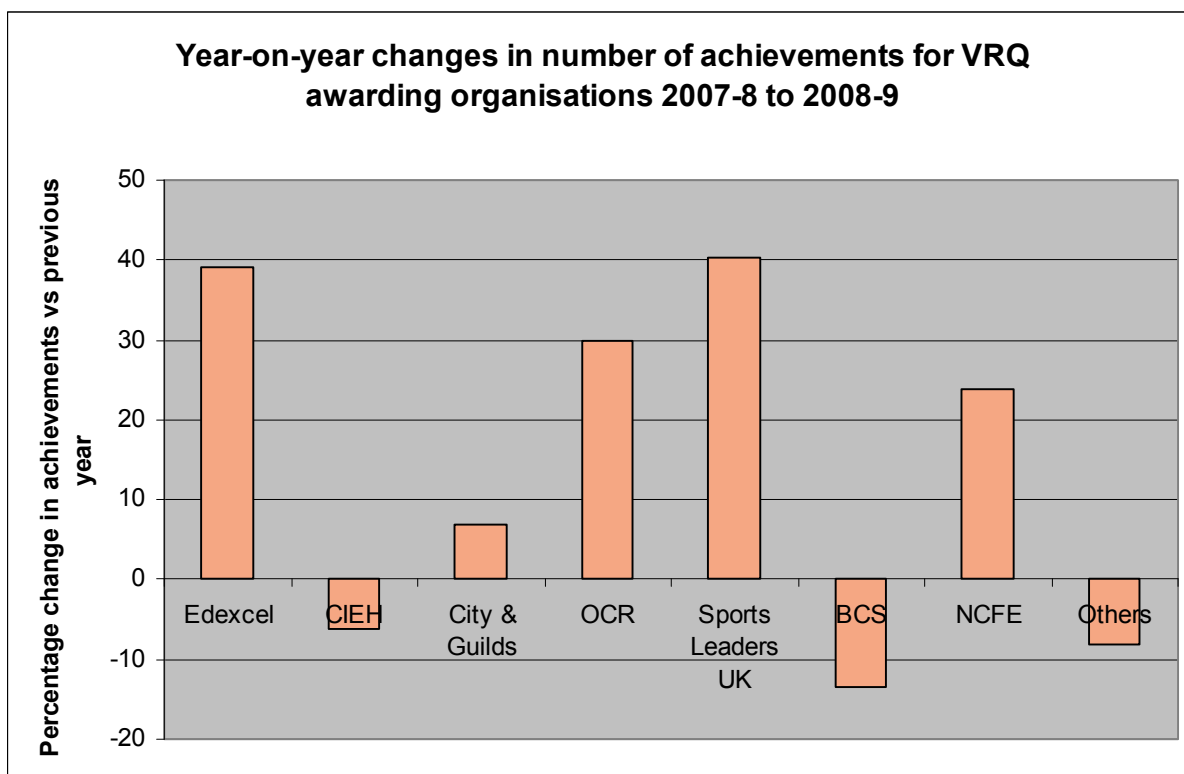


Chart 8.10: Percentage changes in number of achievements in VRQs. Source: Ofqual statistics database. Note: Organisations are in order from left to right in terms of their overall number of achievements in 2008-9.

The graph above shows the year-on-year changes for the seven awarding organisations with the most VRQ achievements. The overall strong growth in achievements by the top seven awarding organisation in terms of achievements is highlighted. Once again it is some of the organisations in the top seven that are driving the overall increase in number of achievements that are up by 6 percentage points from last year.

Appendix 1: Glossary of terms

Glossary for qualification name acronyms and abbreviations

Acronym	Qualification name in full
AEA	Advanced Extension Award
BS	Basic skills
DIP	Diploma
DT	Diploma template
EL	Entry level
ESOL	English for speakers of other languages
FS	Functional skills
FSMQ	Free-standing mathematics qualification
GCE	GCE A level
GCE AS	GCE advanced subsidiary level
GCSE	General Certificate of Secondary Education
GNVQ	General National Vocational Qualification
HL	Higher level
KS	Key skills
NVQ	National Vocational Qualification
OG	Other general qualification
OQ	Occupational qualification
PL	Principal learning
PROJ	Project
QCF	Qualifications and Credit Framework qualification
VCE	Vocational Certificate of Education
VCE AS	VCE advanced subsidiary level
VRQ	Vocationally Related Qualification

All of these qualifications are used in our classification of 'other' qualifications with the exceptions of GCE, GCE AS, GCSE and KS.

Definitions of terms used in the report

Accredited qualification: an accredited qualification is one that has met the relevant criteria as set by the regulators of qualifications in England, Wales and Northern Ireland. On accreditation a qualification will be issued with a Qualification Accreditation Number (QAN), and specific dates set for the period for which the qualification will be accredited. A qualification will comprise smaller components called "units", which may be arranged into structures such as pathways, modules or unit groups.

Accreditation start date: the date on which a qualification becomes accredited.

Operational start date: the date on which a qualification may be offered to learners, or when they may formally register for the qualification. This will often be the same as the accreditation start date.

Accreditation end date: the last date on which a learner may register for a qualification. Currently registered learners may, however, continue to work towards the qualification.

Certification end date: the last date on which a learner may be awarded with a certificate of achievement for the qualification.

Specification: a term used by awarding organisations to refer to discrete versions of qualifications, and to the content and structure of those qualifications. Where the specification for a qualification changes, the qualification is usually re-accredited as a new qualification with a new QAN and accreditation dates. Two or more versions of the same qualification, each with different QANs, may therefore be operating in the national frameworks at the same time, as an earlier accredited qualification is replaced by an updated version.

Number of achievements: a term used to quantify the volume of qualifications delivered from an awarding organisation to a learning provider and ultimately to the end user. The term applies as follows:

- one GCSE entry – one achievement
- one GCSE short course entry – half an achievement
- one GCSE dual award entry – two achievements
- one GCE A level entry – one achievement
- one entry in an applied GCE A level – two achievements
- one GCE AS level entry – half an achievement
- one 'other' qualification certificate issued – one achievement.

Glossary for awarding organisation name acronyms and abbreviations

Acronym	Awarding organisation name in full
1st4sport	1st4sport Qualifications
ABRSM	Associated Board of the Royal Schools of Music
AQA	Assessment and Qualifications Alliance
BIIAB	BIIAB
BCS	The British Computing Society
CACHE	Council for Awards in Children's Care and Education
Cambridge ESOL	University of Cambridge ESOL Examinations
CCEA	Council for the Curriculum, Examinations and Assessment
CIEH	Chartered Institute of Environmental Health
CSkills	Construction Skills
EAL	EMTA Awards Limited
Edexcel	Edexcel Limited
EDI	Education Development International plc
IQL	Institute of Qualified Lifeguards
NCFE	NCFE
NOCN	National Open College Network
NPTC	National Proficiency Tests Council
OCR	Oxford, Cambridge & RSA Examinations
Sports Leaders UK	Sports Leaders UK
SQA	The Scottish Qualifications Authority
TCL	Trinity College London
VTCT	VTCT
WJEC	WJEC CBAC Limited

Appendix 2: Achievements for all ‘other’ awarding organisations in England, Wales and Northern Ireland

Awarding organisation	2003-4	2004-5	2005-6	2006-7	2007-8	2008-9
1st4sport Qualifications	32,509	40,109	41,737	48,640	51,663	64,070
Association of Accounting Technicians	22,448	25,425	26,455	26,420	27,275	29,437
Awarding Body for Built Environment	4	105	248	3,374	3,455	2,668
ABC Awards	21,497	20,978	45,558	44,801	41,924	45,477
Association of British Dispensing Opticians	0	0	0	452	310	641
Association of Business Executives	0	0	0	0	13,208	5,061
Associated Board of the Royal Schools of Music	294,380	295,852	300,301	291,919	281,741	290,588
Association of Chartered Certified Accountants	0	0	2,359	3,601	2,583	781
Active International Qualifications	0	2,672	3,965	9,498	8,744	6,420
Automotive Management and Development	258	0	0	0	0	0
Association of Medical Secretaries, Practice Admin & Receptionists	973	1,693	1,743	1,046	1,207	0
Assessment and Qualifications Alliance	69,903	97,831	74,932	106,923	118,263	204,612
AQA – City & Guilds	0	0	0	0	157	9,303
Amateur Swimming Association	8,433	8,773	8,260	6,347	4,681	8,137
Ascentis	389	7,127	20,036	20,404	17,528	34,345
Award Scheme Development and Accreditation Network	2,267	4,101	8,015	15,592	24,944	39,289
ASET	898	526	3,535	6,532	7,838	2,719
The Association of Sports Qualifications	0	0	0	0	958	732
British Ballet Organisation	4,931	4,674	5,433	4,638	2,276	2,047
The British Computer Society	25,553	102,810	127,770	152,969	119,186	104,925
British Canoe Union AB	0	0	0	0	0	2,058
British Driving Society	0	0	0	0	2,903	770
British Gymnastics	3,758	4,005	3,815	4,275	4,291	3,069
British Horseracing Education and Standards Trust	648	701	855	1,048	3,257	2,213
British Institute of Innkeeping	72,123	135,853	128,333	88,353	79,907	77,392
British Safety Council Awards	0	173	5,731	12,793	34,351	50,427
CABWI Awarding Body	217	195	165	148	295	999
Council for Awards in Children’s Care and Education	36,394	40,865	53,131	56,468	63,599	61,423
University of Cambridge ESOL Examinations	64,404	63,819	88,459	101,475	164,249	156,571

Council for the Curriculum, Examinations and Assessment	6,446	7,416	15,270	12,807	19,521	20,891
City College Norwich	0	0	0	0	0	0
CFA Society of the UK	1,519	1,548	1,385	1,375	2,196	2,067
City & Guilds of London Institute	546,063	693,686	726,089	722,847	829,357	1,001,087
Confederation of International Beauty Therapy & Cosmetology	0	0	0	0	0	0
University of Cambridge International Examinations	0	0	0	0	0	165
Chartered Institute of Environmental Health	493,021	480,932	446,613	426,707	427,755	401,763
Chartered Institute of Housing	599	1,092	1,007	1,123	1,486	1,954
The Chartered Insurance Institute	9,082	11,388	11,976	11,498	9,520	9,442
Chartered Institute of Logistics and Transport in the UK	247	183	198	224	269	278
Chartered Institute of Marketing	1,673	2,779	3,236	3,179	2,986	2,625
Chartered Institute of Building	507	353	569	498	639	717
Chartered Institute of Building and Chartered Institute of Housing Joint Awarding Body	0	0	0	0	0	28
Chartered Institute of Personnel and Development	6,602	7,770	7,709	9,324	5,620	9,951
Chartered Institute of Public Relations	77	80	143	122	269	61
Chartered Institute of Purchasing and Supply	1,674	2,370	4,621	3,727	2,914	3,791
CISI	3,955	39,191	34,279	29,030	28,858	18,223
Construction Industry Training Board	0	0	0	0	0	0
Chartered Management Institute	7,971	9,122	10,181	12,856	13,956	23,448
Counselling and Psychotherapy Central Awarding Body	5,099	5,684	6,386	7,305	7,687	7,666
Chartered Quality Institute	29	69	72	111	125	152
CSkills Awards – Construction Skills	50,426	88,952	97,731	124,459	140,288	161,258
The Confederation of Tourism and Hospitality	0	0	0	0	0	225
Central YMCA Qualifications	10,502	15,361	15,434	17,624	21,572	21,858
Defence	0	0	0	0	0	4
EMTA Awards Limited	28,365	40,994	46,134	46,402	50,228	68,118
Engineering Construction Industry Training Board	453	1,053	2,207	2,045	2,465	1,869
Edexcel Limited	129,593	177,816	242,011	420,561	625,745	832,779
Education Development International plc	31,829	59,411	89,623	124,036	129,107	184,828
Equestrian Qualifications Limited	9,620	2,895	4,801	6,488	8,931	8,134
English Speaking Board (International) Ltd	11,183	9,669	10,752	13,464	14,363	18,337
Engineering Training Council Awards Limited	1,224	1,673	1,584	849	945	992
First Aid Qualifications	0	540	4,160	6,544	7,039	6,474
Food and Drink Qualifications	4,487	2,752	3,830	3,740	4,009	6,346

The Gemmological Association	160	155	134	139	58	659
Glass Qualifications Authority	2,422	2,104	2,490	2,239	2,339	3,720
Graded Qualifications Alliance	8,907	9,480	12,537	11,289	14,955	10,127
Guildhall School of Music and Drama	30,347	29,521	25,443	6,322	0	0
Hospitality Awarding Body	23,373	27,251	30,236	25,396	24,001	19,722
Highfield Awarding Body for Compliance	0	0	0	0	0	6,452
International Association of Book-keepers	5,300	4,495	1,704	1,366	1,871	4,135
Institute of Administrative Management	0	0	0	1,424	2,714	2,874
International Baccalaureate Organisation	0	0	0	5,171	17,815	23,650
International Curriculum and Assessment Agency (Examinations)	1,184	1,703	674	1,156	1,787	1,683
Institute of Credit Management	224	173	201	162	64	190
The Institution of Fire Engineers	0	0	0	0	0	738
Institute of Financial Services	10,060	9,800	8,803	11,851	11,286	14,771
Institute of Hospitality	45	57	48	6	0	0
Institute of Legal Executives	3,097	3,582	1,372	1,567	1,151	1,519
Institute of Leadership and Management	11,534	12,837	41,035	43,849	38,559	42,682
Institute of Motor Industry Awards Limited	5,856	10,172	15,729	22,843	24,660	30,171
Institute of Commercial Management	0	0	0	0	0	95
IoL Educational Trust	346	742	433	723	738	264
Institute of Materials	0	62	79	42	58	101
Institute of Qualified Lifeguards	33,207	35,389	35,741	38,495	37,934	42,061
Institute of Revenues, Rating and Valuation	5	10	5	58	92	187
Institute of Sales and Marketing Management	353	399	367	354	233	398
Imperial Society of Teachers of Dancing	74,036	79,883	68,023	64,270	55,930	46,006
ITC First Aid Ltd	0	0	0	1,650	3,768	4,366
International Therapy Examination Council	8,647	10,571	9,723	8,102	6,814	5,934
London Academy of Music and Dramatic Art	50,025	33,417	35,204	40,028	42,737	44,220
LANTRA	129	3,545	8,083	7,167	20,864	3,612
Lifetime Awarding	0	0	0	0	0	0
McDonald's	0	0	0	0	0	471
Mountain Leader Training England	0	0	0	332	1,123	1,225
Mineral Products Qualification Council	1,118	812	885	964	878	1,164
Market Research Society	267	246	301	292	303	443
NCC Education Services Ltd	0	0	59	177	246	495

NCFE	36,703	70,303	108,690	124,514	122,313	177,970
NCTJ Training	0	0	0	0	917	1,483
NEBOSH	6,088	8,016	11,869	9,419	11,280	12,259
National Federation of Property Professionals	453	737	1,095	2,856	1,845	1,003
National Open College Network	3,283	79,877	120,742	103,950	133,436	153,975
National Proficiency Tests Council	37,006	40,130	34,213	38,207	79,571	62,110
Network Rail	0	0	0	0	0	45
Oxford, Cambridge and RSA	226,460	233,753	418,304	530,323	726,688	824,906
The Open University	166	1,207	1,687	756	1,566	480
Process Awards Authority/Vocational Qualifications in Science Engineering and Technology	1,114	1,312	2,038	2,376	2,602	3,126
Professional Association of Driving Instructors	51	52	147	120	77	67
Packaging Industry Awarding Body Company	2	28	27	22	27	183
The Pensions Management Institute	98	146	98	305	346	180
Qualifications for Industry Ltd	113	112	100	0	0	0
Qualifications Network	0	0	0	0	16	292
Royal Academy of Dance	31,397	32,497	35,838	37,858	38,360	39,563
Royal College of Veterinary Surgeons	1,583	1,637	3,774	1,887	4,450	2,907
Royal Horticultural Society	0	0	324	3,571	1,682	1,948
Rock School Ltd	6,248	8,905	12,532	14,131	12,779	20,984
Royal Society for Public Health	96,678	82,995	73,662	55,894	41,288	41,463
Skills Assurance Services Limited	257	182	80	0	0	0
Signature	16,968	20,764	20,008	13,856	11,098	12,144
Security Industry Training Organisation	0	0	0	0	0	0
Skillsfirst Awards Limited	0	0	0	0	0	0
Sports Leaders UK	34,856	46,101	56,352	72,225	71,660	100,539
Scottish Qualifications Authority	0	0	0	0	92	254
Safety Training Awards	5,976	12,313	13,250	11,290	6,070	7,050
Trinity College London	34,609	69,658	92,019	99,216	107,372	114,114
The Learning Machine	0	0	0	0	4,063	4,278
Thames Valley University	21,367	24,243	33,703	29,530	31,699	29,683
University of the Arts, London	0	0	0	0	2,970	13,478
Vocational Training Charitable Trust	56,370	73,594	85,734	91,735	88,826	86,964
Waste Management Industry Training & Advisory Board	1,101	1,831	2,675	1,764	3,458	5,468

Worshipful Company of Farriers	72	85	90	79	101	94
Worshipful Company of Spectacle Makers	47	89	90	105	203	186
Welsh Joint Education Committee	36,197	37,107	38,132	38,716	39,830	49,529
WJEC-EDEXCEL-CBAC	0	0	0	0	0	0
Wine and Spirit Education Trust	7,584	10,677	12,265	14,820	14,634	12,322

Appendix 3: New awarding organisations recognised in 2008–9

Agored Cymru

British Wheel of Yoga Qualifications

Constructing Excellence in Learning Limited

ConstructionSkills²⁹

DNA Awards Ltd

Highfield Awarding Body for Compliance

Institute of Fire Engineers

Lifetime Awarding

New Era Academy of Drama and Music (London) Ltd

Qualifi Ltd

Skillsfirst Awards Limited

WJEC-Edexcel-CBAC

²⁹ ConstructionSkills should not be confused with CSkills Awards – Construction Skills.

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