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Research and analysis

Qualifications price index 2021

Published 24 February 2022

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Foreword

Ofqual is the independent qualifications regulator for England, regulating on behalf of students of all ages and apprentices.

Ofqual has 5 statutory objectives set out in the Apprenticeships, Skills, Children and Learning Act 2009. In addition to statutory objectives to maintain standards and promote public confidence Ofqual also has a statutory objective to secure that regulated qualifications are provided efficiently and their price represents value for money.

In response, Ofqual publishes an annual qualifications price index report. This aims to support competition in the market by highlighting annual price changes across the sector. Last year we updated our regulations – requiring awarding organisations to publish qualification fee information so it is easily accessible to potential purchasers.

This supports price transparency in the sector for the benefit of purchasers and potential purchasers.

Ofqual published its first [qualifications price index in 2019](#). The [qualifications price index 2020](#) was published with supplementary analysis that captured the effects of the coronavirus (COVID-19) pandemic on the costs and savings awarding experienced.

The qualifications price index 2021 continues our longitudinal price analysis and also provides information on the rebates provided by exam boards in light of disruption to exams due to the pandemic. As in 2020, it is also published with contextual analysis that sets out the costs and savings awarding organisations experienced this year.

Background and context

Qualification delivery was severely disrupted in 2021, and, for the second year in a row, the summer exam series for GCSEs, AS, A levels and some vocational and technical qualifications was cancelled. Qualifications in 2021 were instead awarded under the [General Qualifications Alternative Awarding Framework](#) (GQAAF) and the [Vocational and Technical Qualifications Contingency Regulatory Framework](#) (VCRF).

Ofqual consulted widely to develop the GQAAF and the VCRF. As for all our consultations, a regulatory impact assessment for each framework was undertaken and the results published in our consultation outcome documents: [GQAAF consultation outcome](#) and [VCRF consultation outcome](#).

The evidence gathered through the regulatory impact assessments, along with a review of other published information, was used to inform the contextual analysis in this report. During October and November 2021, we spoke with 4 exam boards offering general qualifications and another 4 awarding organisations offering vocational and technical qualifications. In these conversations we gathered the evidence and insight presented in this report.

The vocational and technical qualifications landscape is particularly diverse and so to collate wider evidence, we also gathered evidence from 2 sector representative bodies. First, we spoke with the Association of Colleges (AoC) which represents further education, sixth form, tertiary and specialist colleges. Then we also spoke with the Federation of Awarding Bodies (FAB) which represents regulated awarding organisations.

Throughout the report, references to awarding organisations include exam boards unless stated otherwise.

The methodology used in the qualifications price index is set out in the annex.

Key findings

Qualifications price index 2021: price analysis

1. The average price for all qualifications increased by 3.7% between 2020 and 2021, compared with 3.2% between 2019 and 2020.
2. The price for general qualifications increased overall by 4.2% between 2020 and 2021 giving an average A level price of £105.12 and GCSE price of £43.91.

3. The price for vocational and technical qualifications increased overall by 1.9% for the same period.

! **Qualification arrangements in 2021 did not include a summer exam series for GCSEs, AS or A levels. Exam boards issued rebates to centres to reflect these cost savings. (See section [qualification price rebates 2021](#) for more detail). The analysis set out above does not reflect those rebates, and so should be treated with caution.**

Qualifications price index 2021: contextual analysis

Qualification arrangements in 2021 did not include a summer exam series for GCSEs, AS, A levels. Therefore, exam boards realised some cost savings in relation to exam paper marking and moderation of assessment, exam paper printing, distribution, and scanning.

To deliver qualifications in 2021, under the GQAAF and VCRF frameworks, awarding organisations needed to undertake new activities and incurred associated costs from these activities. These costs can be considered in the following overall categories:

- direct delivery costs (design and implementation costs)
- people and staff costs (including extended working hours)
- other costs (more business as usual activity)
- opportunity costs (loss of potential benefits from paused business improvement and development)

Qualification arrangements during 2021, and throughout the pandemic, have potential future implications for the sector which may ultimately lead to efficiencies in delivery. Awarding organisations highlighted an ongoing digital transformation in delivering vocational and technical qualifications, with further use of innovations such as: online assessment, remote invigilation and e-certificates. Awarding organisations identified that stakeholders are now more experienced in collectively finding a way through identified barriers and implementing innovations for qualification delivery.

Awarding organisations highlight they are more agile as businesses and more able to respond to changing market demands. The market, especially for some vocational and technical qualifications, embraced adaptations for qualification delivery in 2021 and have a desire to continue with these.

Awarding organisations identify that their employees have developed a new and widened skillset, including implementing lessons learned from qualification delivery in 2020. This may support efficiencies with future qualification delivery and future developments in the sector.

Awarding organisations highlight the compound effect on people and staff to design and implement the necessary qualification delivery changes has led to extended working hours and deferred annual leave. This has a future implication of potential talent loss from the sector due to employee burnout.

Awarding organisations incurred opportunity costs from all the activities they did not undertake and cannot therefore realise any benefits. This includes business development work (for example, lost commercial opportunities, and reduced qualification development) and paused business improvement projects (for example, implementing new IT systems).

Exam boards note there has now been no summer exam series for 2 years. This creates a reduction in corporate memory around the processes and procedures involved in running an exam series (described as loss of 'muscle memory'). This

leads to increased risk which will require increased planning and increased sector communications and training to mitigate, within both awarding organisations and centres.

Awarding organisations note that the pandemic has impacted their income levels during 2020 and 2021, and also their income forecasts. The wider external environment also includes the backdrop of current government sector reform and creates ongoing uncertainty which impacts on business planning and development.

Qualification prices and rebates

Qualifications price index 2021: price analysis

The qualifications price index is a longitudinal analysis of changes in price of the regulated qualifications. The application of rebates to certain qualifications in light of the pandemic is not reflected in this analysis in order to enable ongoing analysis of changes in underlying qualification price. This is consistent with the approach taken to the [2020 qualifications price index](#). The price analysis does not reflect prices actually paid by centres, given the varying rebates and the use of average price analysis.

Between January and February 2021 we collected the standard qualification fee information for all regulated qualifications (see Ofqual [Register of Regulated Qualifications](#)). The standard qualification fee is defined in the [statutory guidance](#) for our [General Conditions of Recognition, Condition F](#).

The annex provides detail regarding the methodology applied. The approach taken for 2021 is consistent with those of previous years.

Headline findings in relation to price:

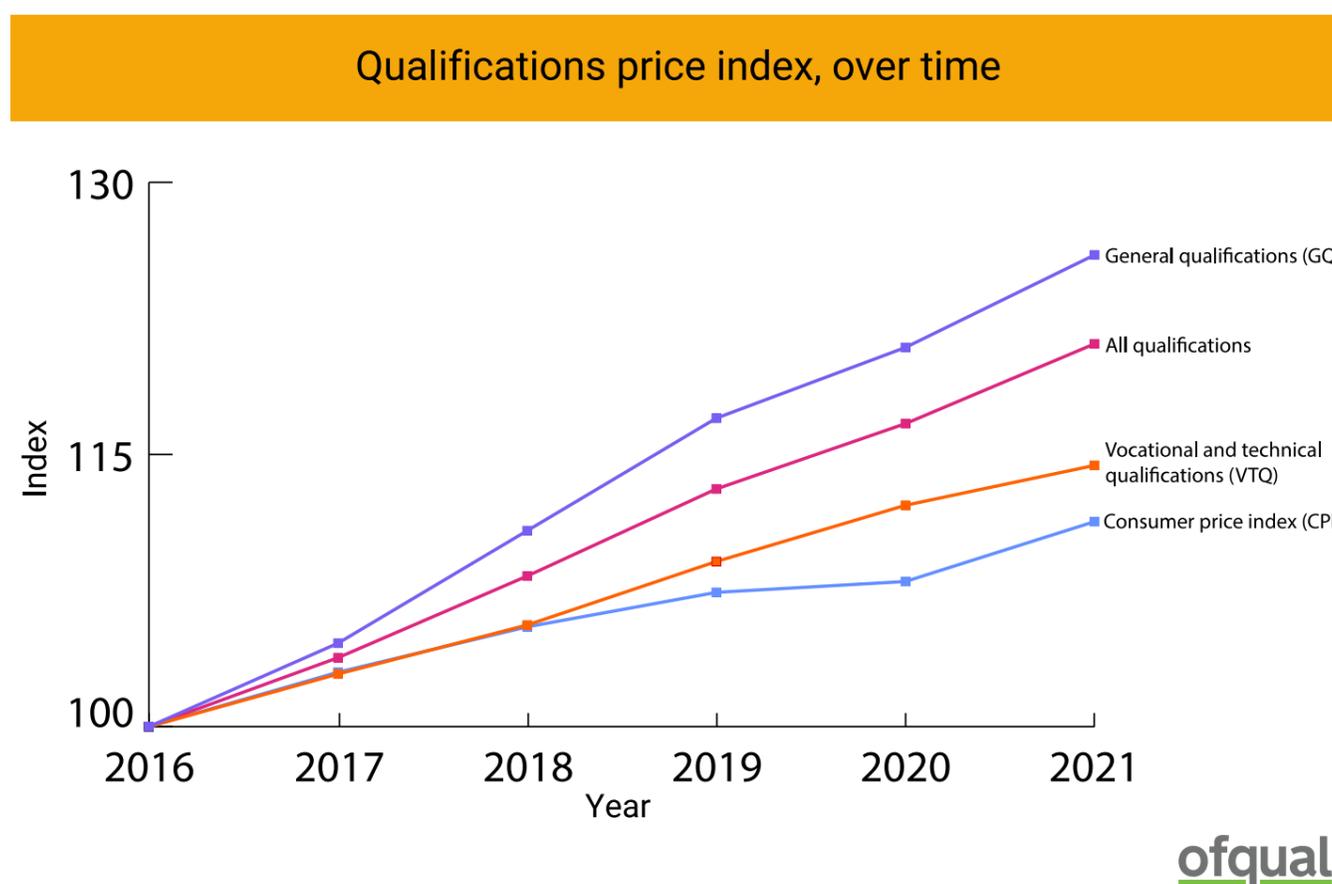
- in 2021 the average A level price is £105.12 (compared with £101.44 in 2020)
- in 2021 the average GCSE price is £43.91 (compared with £42.02 in 2020)
- the average price for all qualifications increased by 3.7% between 2020 and 2021 (equivalent increase of 3.2% between 2019 and 2020)
- the price for general qualifications increased overall by 4.2% between 2020 and 2021 (equivalent increase of 3.3% between 2019 and 2020)
- the price for vocational and technical qualifications increased overall by 1.9% between 2020 and 2021 (equivalent increase of 2.9% between 2019 and 2020)

The overall price of all qualifications increased by 3.7% from 2020 to 2021 (see [figure 1](#)). This is a similar proportional increase compared with qualification prices between 2019 and 2020 which rose by 3.2%. From 2020 to 2021 vocational and technical qualifications increased by 1.9% (compared with 2.9% in 2020), and general qualifications increased by 4.2% (compared with 3.3% in 2020) using average prices weighted by certificate volumes. Over the same period the consumer price index increased at a slower rate. These increases are shown below in figure 1 and represented in figure 2, which shows the price index change over time.

Figure 1: Qualification price changes, by type of qualification



Figure 2: Qualifications price index, over time

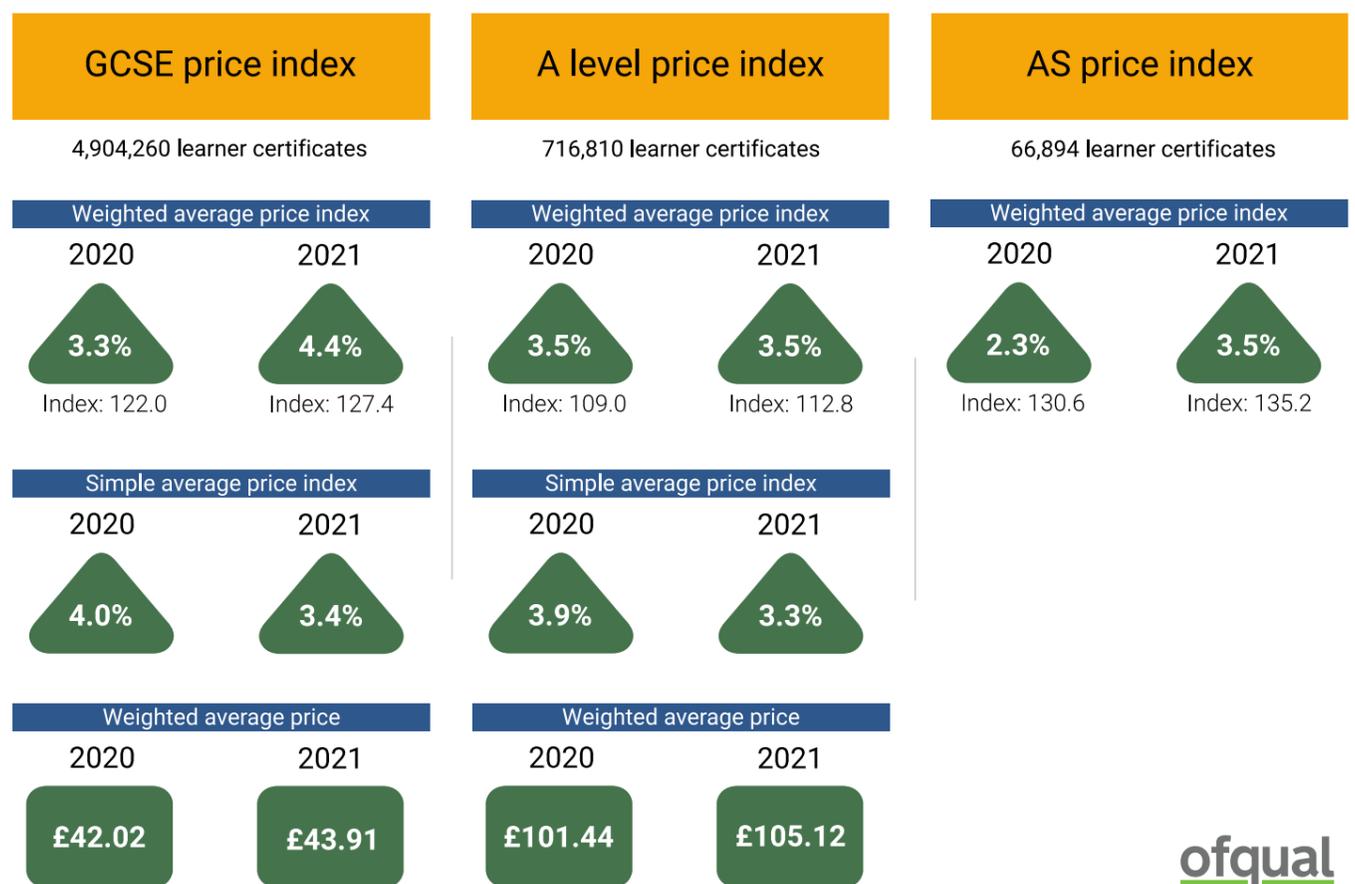


The weighted average price for A level qualifications increased by 3.5% from 2020 to 2021 (see [figure 3](#)). This gives a weighted average 2021 price of £105.12. The simple average price increased marginally less over the same period (3.3%).

The weighted average price for GCSE qualifications increased by 4.4% from 2020 to 2021. This gives a weighted average 2021 price of £43.91. The simple average price increased by a smaller rate over the same period (3.4%).

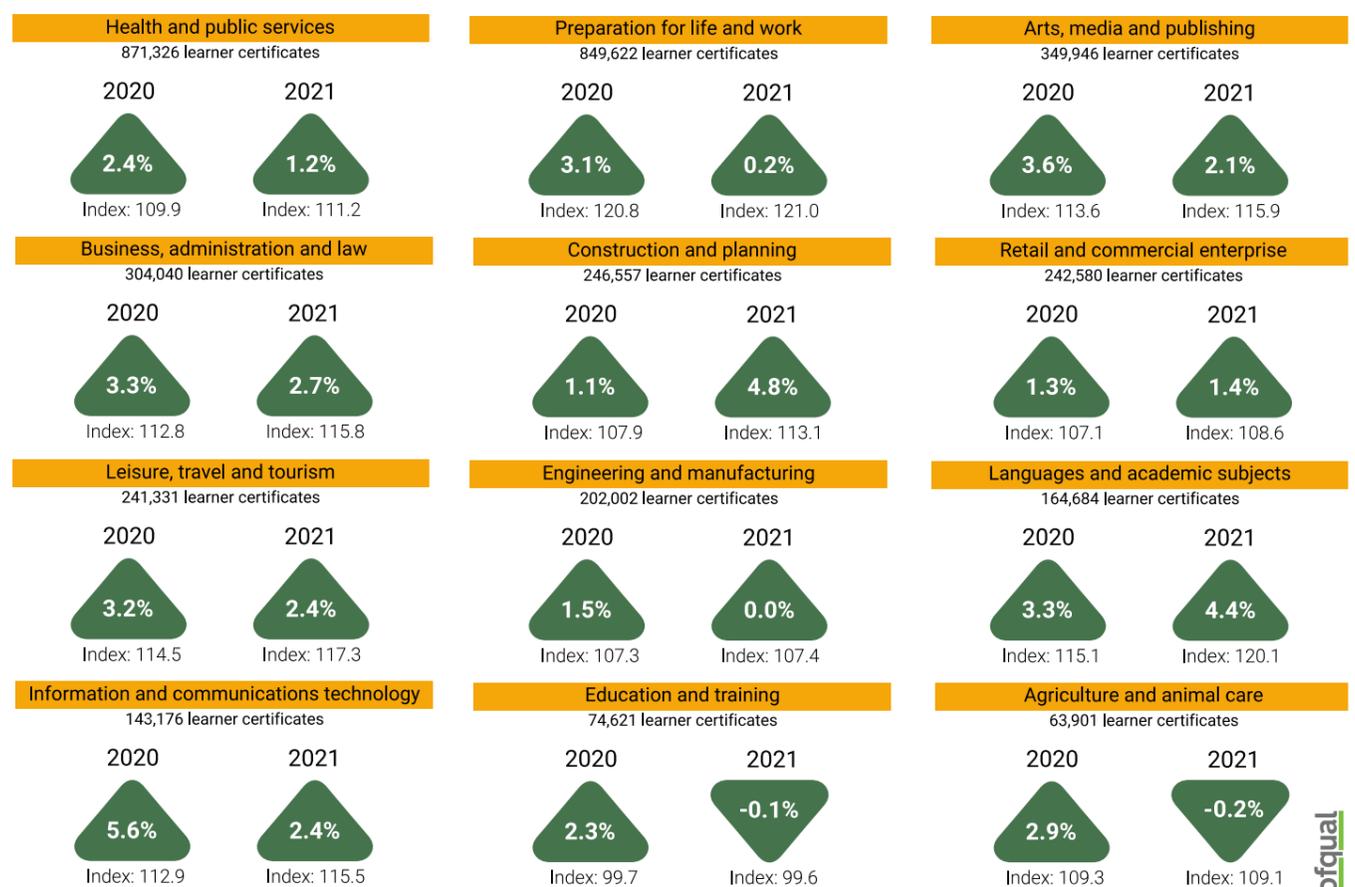
The weighted average price for AS qualifications increased by 3.5% from 2020 to 2021. The number of AS certificates awarded in 2019 to 2020 (66,894) is again much lower than in previous years due to AS reform (98,744 certificates in 2018 to 2019 and 236,175 in 2017 to 2018). Hence, we do not include further price analysis for AS level qualifications. See [figure 3](#) below.

Figure 3: Price change for A level, GCSE and AS level qualifications



For vocational and technical subject areas, we analyse 12 subject area groupings within the sector (see [figure 4](#)). All sectors show a reduction in the number of certificates awarded for 2019 to 2020, compared with the previous year (see the [annual qualifications market report: academic year 2019 to 2020](#) for more detail). The subject area of construction and planning shows the largest percentage increase in qualification price between 2020 and 2021 (4.8%). The subject areas of education and training, and agriculture and animal care, show a marginal decrease in qualification prices (-0.1% and -0.2% respectively). See [figure 4](#) below.

Figure 4: Price changes in vocational and technical qualifications by sector subject areas



Qualification price rebates 2021

Qualification arrangements in 2021 did not include a summer exam series for GCSEs, AS, A levels. Therefore, exam boards realised some cost savings around in relation to exam paper marking and moderation of assessment, exam paper printing,

distribution, and scanning.

The timing of cancellation also had an impact on the level of qualification rebate which exam boards provided to centres. Exam boards published qualification fees after the government's announcement on 4 January 2021 that summer exams were cancelled. Compared with arrangements for qualifications in 2020, the earlier cancellation of the summer exam series meant exam boards incurred less committed spend to some activities.

By early August 2021 all exam boards had published the level of qualification fee rebate they would issue to schools and colleges, to reflect the different activities required for qualification delivery 2021, see [table 1](#).

Table 1: Qualification fee rebate 2021, by exam board, for GCSE, AS and A level

All information extracted from published sources, retrieved on 21 January 2022: [AQA: Our refund for summer 2021](#), [OCR confirms summer 2021 fee rebate](#), [Pearson: 2021 qualification feed FAQs](#) and [media report covering Pearson fee rebate](#), and [WJEC: Qualification entry fees reduced](#)

Exam board	Qualification fee rebate percentage	Equivalent financial value rebate to sector
AQA	26%	£45m
OCR	42%	£18.4m
Pearson	33%	£31m
WJEC	42%	£8m

These rebates reflect commercial decisions taken by each exam board, factoring the differing activities required for qualification delivery in 2021 compared with recent years, and the associated cost implications for the relevant activities.

Impact of arrangements in 2021 on costs and savings

Summary of awarding organisation activities

Awarding organisations confirmed they undertook the following specific activities required to deliver qualifications in 2021 (see section [direct qualification delivery costs](#) for more detail):

- keeping up to date with developing government policy, responding to consultations, and engaging with stakeholders
- developing all materials required for the 2021 process for awarding grades, including enabling students to undertake appeals
- delivering the 2021 process including internal staff training, training for centres, systems development, related quality assurance for centres

- undertaking student appeals
- offering an autumn exam series (for general qualifications)
- completing all relevant governance as required, including implementing internal governance processes along with regulatory requirements (for example, submission of data requests)

Awarding organisations' costs

Direct qualification delivery costs

Awarding organisations incurred a range of costs at different stages of delivery of qualifications in 2021. Some were in relation to new activities, others due to changes in how usual activities taken in a normal year were undertaken due to the pandemic.

Keeping up to date with policy developments

This activity included responding to Ofqual consultations (for example, relating to developing the GQAAF and VCRF regulatory frameworks) and reading and analysing decision documents. Some awarding organisations also attended stakeholder communications and engagement events and used other opportunities to keep informed about policy developments, including events by Ofqual. In smaller awarding organisations the number of regulatory meetings impacted on workforce capacity as it was difficult to transfer the relevant knowledge within short timescales hence, for continuity purposes, the same person generally attended all the meetings.

Before the start of January 2021 (when policy changed and exams were cancelled), exam boards were initially preparing for a compressed summer exam series in 2021 designed to give students more time to prepare for exams and the provision of advance information about the content of the exams to support students' revision.

Developing and designing the processes to deliver qualifications

This was a detailed and complicated process undertaken over short timescales, involving a high level of internal resource to develop the necessary guidance materials for centres to determine teacher-assessed grades. Awarding organisations wanted to create guidance and additional assessment materials with a high level of detail and accuracy, to ensure clarity and avoid any unintended consequences. The process development therefore required significant planning and resource commitment. This included exam boards producing GCSE, AS and A level grade descriptors. Awarding organisations prioritised resource during this stage knowing this may support efficiencies in the later stages of awarding and in relation to appeals.

Awarding organisations noted that centre communications and training had additional challenges to ensure clarity between how the approach in 2021 differed to that in 2020 (using teacher-assessed grades in 2021 compared with centre assessment grades in 2020). Training and guidance materials needed to clearly state how the 2021 process was different than 2020, to ensure understanding and the clarity required for successful implementation across the full range of centres.

Awarding organisations also noted an increase in communications from centres as a result of the high-profile sector policy changes for awarding grades in 2020. Awarding organisations therefore needed to create communications to support centres, aiming to provide reassurance within a developing and uncertain external environment. Awarding organisations also noted centres understandably wanted further information as early as possible after policy decisions were announced. This meant awarding organisations also needed to communicate with centres to manage expectations about timescales.

The GQAAF and the VCRF outline conditions under which students could appeal

teacher-assessed grades. Awarding organisations needed to design an appropriate appeal process and develop accompanying materials and guidance to support centres with preparing for challenges and appeals. Awarding organisations described how the new qualification arrangements in 2021 presented challenges with forecasting the number of students who would appeal their teacher-assessed grades. Exam boards noted their increased activity required to forecast appeal numbers to support the Department for Education partially funding activities involved in this stage of the process.

Implementation of policies and processes to deliver their qualifications

This required awarding organisations to update their technology systems, for example to develop portals to capture submission of teacher-assessed grades and supporting evidence from centres. Awarding organisations therefore incurred costs with delivering the required system change requests. Awarding organisations have different business models and either used internal resource to deliver IT changes (depending on capacity and capability) or outsourced this activity. For some exam boards updating systems significantly increased external ICT costs. Some awarding organisations also incurred annual licence and system maintenance costs for offering online and remote assessment, and remote invigilation options for qualification delivery. This was especially relevant to organisations when delivering functional skills qualifications which ran in addition to the delivery of results based on teacher-assessed grades.

In gathering our evidence from wider sector stakeholders, the Association of Colleges (AoC) highlighted how colleges (and other types of exam centre) carried increased responsibility during the 2021 qualification delivery process because results were based on teacher-assessed grades. Determining and quality-assuring the teacher-assessed grades incurred significant costs in the sector. They especially identified additional costs associated with extended legal challenges regarding grades, and costs for ensuring sufficient online IT system security.

Undertaking the quality assurance for teacher-assessed grades was a significant process to undertake and incurred significant associated costs for awarding organisations. All people undertaking work at the different stages of [centre quality assurance](#) needed to be trained to undertake this role. Some awarding organisations used additional external staff to undertake elements of the quality assurance process. This led to additional staff costs as well as training requirements. Exam boards noted how the decision to add [stage 0 to the quality assurance process](#), led to additional activities under shorter timescales with associated costs.

The approach to quality assurance required awarding organisations to check evidence submitted by centres to support teacher-assessed grades. Exam boards reviewed the teacher-assessed grade data for all centres across all qualifications. They reviewed the student work that had been used by teachers to determine a sample of teacher assessed grades. Awarding organisations delivering vocational and technical qualifications had different arrangements, with flexibility around quality assurance requirements. They could develop and undertake different approaches as deemed appropriate. Awarding organisations highlighted even a risk-based sample approach created a high level of activity to undertake in short timescales. One awarding organisation noted when they had a small number of submissions at a centre this gave a challenge with sampling and so they instead reviewed all submissions. Another awarding organisation highlighted a scenario where they reviewed all the evidence submitted by a specific centre (identified using a risk-based approach). The awarding organisation allocated a full-time employee and an external consultant to complete work in this stage of the process. This took 4 weeks of dedicated resource time and associated internal and external costs.

Results days in 2021 took place during the same week instead of over a 2-week period. Results for A level, AS, and relevant level 3 vocational and technical qualifications were issued on 10 August 2021. GCSEs and relevant level 2

vocational and technical qualifications were issued on 12 August 2021. Awarding organisations noted the compressed timescale for results day led to additional pressures and challenges on timescales. This meant preparing for additional capacity to deal with a higher number of customer services and customer contacts during this shorter time period.

Following results day, awarding organisations needed to be ready to process learner appeals. This involved training internal staff to increase capacity to undertake appeals and ensuring relevant priority appeals were identified and prioritised. Due to the difficulties in forecasting appeal numbers, awarding organisations stated they prepared for a scenario of high appeal numbers to ensure they could complete all appeals (including priority appeals) within required timescales.

Exam boards noted significant costs associated with running an autumn series again in 2021. The Department for Education partially funded the delivery of the autumn 2021 exam series (see [table 2](#)).

Implementing relevant internal governance and undertaking regulatory reporting

Internal governance and regulatory reporting, including data requests, were another area of activities and costs in 2021. For example, some awarding organisations held daily senior management meetings to ensure they completed a sufficient level of governance within required timescales. Awarding organisations needed to submit regulatory reporting data requirements to Ofqual regarding 2021 qualification delivery arrangements and awarded grades. Although regulatory reporting takes place each year there were specific arrangements during 2021. Awarding organisations delivering vocational and technical qualifications especially identified this as a large area of intense resource activity and requirements.

The associated costs with increased data collections relate both to internal resource capacity and to technical requirements. One awarding organisation noted it is consequently recruiting an additional full-time role in this area to address internal capacity requirements. Generating the necessary data reports often required manual intervention and, at times, required external supplier costs. The Federation of Awarding Bodies (FAB) especially highlighted the additional burden on internal awarding organisation resource and financial costs from the number of vocational and technical qualifications data requests during 2021.

People and staff costs

Awarding organisations highlighted an impact on the following areas relating to people and staff:

- extended working hours and deferred annual leave requests
- people and staff wellbeing
- move to a hybrid working model

The timescales for process development and delivery in 2021 again led to extended working hours for staff and deferred annual leave requests.

Awarding organisations noted the compound effect of exceptional arrangements in both 2020 and 2021 on the wellbeing of people and staff. There was especially an impact on the process areas which required specialist knowledge. Awarding organisations described how it was difficult to undertake sufficient knowledge transfer and recruitment under such short delivery timescales. Work in some areas needed to be delivered by a small number of people, including senior staff involvement in governance arrangements.

During 2021 awarding organisations generally embedded a hybrid working model of office and remote working. These activities have led to some continued associated costs similar to 2020, for example wider distribution of IT equipment.

Other 2021 costs

As well as activities and direct costs associated with delivering qualifications in 2021, we now summarise other areas where awarding organisations undertook activity and incurred costs during 2021. In this section we capture further information on the following areas:

- activities relating to an anticipated summer exam series 2021 (before policy change)
- calculating and administering centre rebates
- undertaking contingency planning for qualification delivery in 2022
- completing other regulatory required activity (for example, the introduction of a new regulatory policy, [Centre Assessment Standards Scrutiny](#))
- undertaking government policy requirements as needed (for example reapplication for performance tables)
- undertaking medium- and longer-term business strategic planning
- completing baseline operational business activity

Before the start of January 2021 (when exams were cancelled), awarding organisations were initially undertaking activities relating to an anticipated summer exam series in 2021. For exam boards this resulted in committed investment and associated costs. Some exam boards had already started to print exam papers (the level completed before the summer exam series was cancelled varies across exam boards). One exam board had already committed investment to increase its scanning capacity in planning for a compressed summer exam series 2021 timetable. Exam boards had already created the exam paper content and aimed to repurpose this content where possible. Exam boards needed to decide about repurposing exam paper content on a subject-by-subject basis, which required internal resource to review.

Exam boards noted how calculating, communicating, and administering the centre rebates required dedicated internal resource during 2021.

Exam boards especially also noted how contingency planning for 2022 qualification delivery required dedicated time using internal resource. For example, to respond to regulatory consultations in order to influence policy direction, alongside engaging with sector stakeholders.

Awarding organisations highlighted they needed to undertake relevant activity to meet ongoing regulatory requirements. For example, to introduce regulatory policy such as [Centre Assessment Standards Scrutiny](#) during 2021.

One awarding organisation noted they needed to reapply for inclusion into government performance tables for 2024. They had insufficient internal capacity and consequently employed consultants to undertake this type of activity. This solution was at a higher cost than using internal staff.

Awarding organisations noted how, as well as contingency planning for qualification delivery in 2022, they needed to undertake medium- and longer-term business strategic planning. The pandemic caused such a disruption to the sector resulting in an intense organisational focus of resource and priority to deliver qualifications – firstly in 2020 and then in 2021 (described as ‘constantly firefighting’). During 2021, awarding organisations therefore needed to prioritise forward-looking business planning to avoid unintended consequences for the future.

Lastly, awarding organisations also incurred their baseline operational business activity areas which were all still required during 2021 (as per previous years). Exam boards noted that this would include areas of business such as:

- continuing to develop and design exam papers
- data entry

- customer services
- training for centres
- running and maintaining facilities over multiple sites
- maintaining IT systems
- finance processes
- human resources processes
- research and development costs
- non-exam income
- international exam delivery

Awarding organisations' savings

The cancellation of exams meant that exam boards did not undertake certain activities and so realised savings. These activities included:

- exam paper marking and assessment moderation
- exam paper printing (the amount completed before the summer exam series was cancelled varies across exam boards)
- exam paper distribution and scanning

The timing of exam series cancellation in January 2021 meant exam boards had not committed to paying examiners to undertake exam paper marking or moderators to undertake assessment moderation. This resulted in savings compared with delivering an exam series, and also compared with qualification delivery in 2020. As exams were cancelled later for 2020, exam boards had already incurred contracts and made some payments to examiners.

Exam boards did not incur exam paper postage or other distribution costs for qualification delivery in 2021.

Exam boards did not undertake any activity related to exam paper scanning for 2021 qualification delivery. The level of costs saved depends on the business model used for undertaking exam paper scanning (whether an exam board uses an in-house facility or outsources exam paper scanning). Some exam boards saved costs on temporary staff employed to support the processing and scanning of exam papers.

For completeness, table 2 summarises the main process stages for delivering an exam series, with a reference point of 2019 for when the last summer exam series took place, and the impact on each process during the pandemic.

Table 2: Main process stages for delivering an exam series and associated costs impact between 2019 and 2021

Main process stages for an exam series	2019: grades awarded via exam series assessment	2020: grades awarded via centre assessment grades	2021: grades awarded via teacher-assessed grades
Timing of exam cancellation	Not applicable	23 March 2020	4 January 2021
Content development for	Full costs Content	Content all prepared in advance	Content all prepared in advance (repurposed where possible)

questions in exam papers	developed up to 2 years in advance	(repurposed where possible)	
Printing of exam papers	Full costs Exam paper printing generally takes place up to 6 months before a summer exam series	All printing completed (repurposed where possible)	The level of printing completed varies across different exam boards (repurposed where possible)
Distribution of exam papers	Full costs	No requirement to distribute exam papers	No requirement to distribute exam papers
Scanning of completed papers	Full costs	No completed papers to scan Some committed fixed spend although no need for temporary resource to undertake scanning	No completed papers to scan Some committed fixed spend (less than 2020) and no need for temporary resource to undertake scanning
Marking of completed papers	Full costs	Markers were already engaged for a 2020 exam series, so this led to committed spend for workforce planning purposes	Less committed spend requirements compared with 2020 as earlier exam series cancellation meant examiners were not yet fully engaged
Senior examiners undertaking assessment moderation	Full costs	No senior examiner requirements: although some committed spend for workforce planning purposes	No senior examiner requirements: and less committed spend for workforce planning purposes than 2020
Awarding of grades	Full costs to run existing processes for awarding results (results issued as normal over a two-week process)	Development and implementation of new approach to awarding calculated grades based on centre assessment grades Results initially issued as normal over a 2-week process before government policy change required issuing of new grades under short timescales	Development and implementation of new approach to quality assuring results, based on teacher-assessed grades Results issued within shorter timescales (within the same week)

Appeals process	Full costs	Requirement to design and undertake a new process	Requirement to design and undertake another new process (and forecast numbers) Government funding partially supported delivery
Running an autumn exam series	As normal, a November GCSE series providing an opportunity for students to re-sit English language and maths only.	Government policy required exam boards to offer a full GCSE, A level and AS autumn series (where there were low learner numbers)	Government policy required exam boards to offer a full GCSE and A level autumn series and a partial AS autumn series (for five subjects) (The autumn series had lower learner numbers than 2020) Government funding partially supported delivery

Awarding organisations delivering vocational and technical qualifications

These organisations noted some cost savings for undertaking an external assessment remotely compared with on site (for example, travel costs). These savings related to occupational and professional qualifications where assessments and exams needed to continue (where results could not be awarded using teacher-assessed grades). However, awarding organisations noted external assessments generally began to take place on-site again during summer 2021, when coronavirus (COVID-19) restrictions allowed.

Awarding organisations overall saved on general staff travel and subsistence payments and incurred some savings through delivering events remotely instead of in person (for example, saving on venue costs).

Potential implications for the future

The pandemic has affected how qualifications have been delivered for 2 years now. This has potential implications, costs and savings, opportunities and threats, for the future in a number of areas:

- an anticipated exam series in 2022
- increased innovation in the sector
- changing market expectations
- awarding organisations' business development (increased agility)
- new ways of working for awarding organisations
- impact on commercial opportunities

The cancellation of summer exams in both 2020 and 2021 means exam boards have identified the need to revisit relevant internal processes and support colleagues with training and retraining of staff to undertake relevant business processes associated with a summer exam series in 2022. Corporate memory is potentially affected after a gap in delivering a summer exam series.

There is ongoing innovation in the sector with a digital transformation taking place – increasing the availability of remote invigilation and online assessment in delivering

qualifications, and issuing of digital certificates (e-certificates) to learners. Awarding organisations note they are reviewing their in-house skillset to ensure their capability and capacity aligns with this changing sector need.

Awarding organisations identify stakeholders are now more experienced in collectively finding a way through identified barriers and implementing innovations in how to design and deliver qualifications. Awarding organisations highlighted that introducing remote qualification assessment, as well as continuing in person methods, requires increased resource to design, implement, and maintain multiple processes. Awarding organisations highlighted they are aware that to realise efficiencies from investments they need to streamline digital processes.

Awarding organisations consider centres have generally embraced the adaptations introduced in vocational and technical qualification delivery over the course of the pandemic. Over time this has led to shifting market demands and sector expectations about the continuation of adaptations to qualifications and the use of technology to deliver assessments remotely (described as 'not needing a classroom to deliver a qualification'). Awarding organisations note the sector now has more understanding about the different elements involved in awarding qualifications and the role of awarding organisations.

Awarding organisations highlight how delivering qualifications during the pandemic has focused them on becoming more agile and therefore supporting their business development. There is a general move to a hybrid way of working which awarding organisations expect to support with staff recruitment. One awarding organisation mentioned how reflecting on certain qualifications and the amount of resource needed to deliver a certain number of certificates has led it to review its portfolio and corporate strategy. They expect this will support with efficiencies for the future.

The work involved in qualification delivery over the last 2 years has led to new ways of working and a new and widened skillset within awarding organisations. This is likely to bring benefits especially when supporting with future qualification reform programmes. Awarding organisations also have an increased confidence in implementing qualification delivery change after navigating the challenges involved in 2020 and 2021. However, awarding organisations also noted that in some cases the challenges from constant change and short timescales involved over the past 2 years may result in talent loss from the sector due to employee burnout.

Awarding organisations diverted resources used for business development during a normal year to deliver qualifications during 2021 (and 2020). This means reduced business development activity and lost commercial opportunities, where the awarding organisation didn't have resource capacity to undertake further activity.

The pandemic also impacted on students being able to complete qualifications, hence it has affected income levels and projected income levels. Awarding organisations noted at times they prioritised qualification delivery over product development and now need to re-focus on qualification development in the short and medium term. Another example is where some awarding organisations have paused business improvement work and projects, including investment in new IT systems. This has put pressure on legacy IT systems and meant awarding organisations could not realise benefits from business improvement work.

Annex

Price analysis methodology

The qualifications price index 2021 applies the same qualification sampling methodology from last year. For general qualifications we analyse qualification fees for 374 general qualifications delivered across 4 exam boards. Vocational and technical qualifications include a sample of 173 qualifications, which cover approximately a third (31%) of all vocational and technical qualification certificates issued in 2019 to 2020. Collection of the 2022 standard qualification fee dataset for the full regulated market of qualifications will allow us to continue to evolve our methodology for future analysis.

Technical notes

All indices begin at 100 in 2016. The simple average price changes are the average of all qualification price increases, irrespective of certificate volumes. Changes in weighted averages are based on prior year volumes. For information we include certificate numbers for the full relevant market from the academic year 2019 to 2020. The product diversity within the vocational and technical qualifications market makes a simple average price index less representative than for the more uniform general qualifications market, hence we do not include that information in this report. General qualifications include A levels, AS and GCSEs. Vocational and technical qualifications subject area groupings are based on categories from the [Ofqual Register of Regulated Qualifications](#).

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