



Ofqual
■■■■■■■■■■



Annual qualifications market report

April 2009

Ofqual/09/4141

Contents

Executive summary	3
Key findings of the <i>Annual qualifications market report</i>	3
Introduction	5
Supply in the qualifications market	7
Awarding organisations	7
Number of recognised awarding organisations	7
Information on recognised awarding organisations	8
Total income of selected awarding organisations	8
Awarding organisations' legal status	11
Awarding organisations' primary area of business activity	12
Accredited qualifications	14
Number of accredited qualifications 2001–08	14
Distribution of accredited qualifications across awarding organisations	15
Number of accredited qualifications by qualification type	16
Demand for qualifications	18
Participation in education	18
Total qualification market by number of achievements awarded	19
General qualifications market	19
Achievements at GCE	20
Achievements at GCSE	22
Achievements in vocational qualifications	24
Vocational achievements by awarding organisations	25
Market share and variances in share of the medium-sized vocational awarding organisations	28
Market in terms of average numbers of achievements per qualification offered	29
Number of achievements awarded broken down by vocational sector	30
Achievements by qualification level	32
Achievements by qualification type	33
Achievements in National Vocational Qualifications (NVQs)	34
Glossary of terms	36
Glossary for qualification name acronyms and abbreviations	36
Definitions of terms used in this report	37
Glossary for awarding organisation name acronyms and abbreviations	38
Appendix A	39
Achievements for all vocational awarding organisations	39
The data on vocational qualifications covers England, Wales and Northern Ireland	39
Appendix B	45
Rationalisation of awarding organisations	45

Executive summary

Key findings of the *Annual qualifications market report*

This is the second *Annual qualifications market report* produced by the qualifications regulators of England, Wales and Northern Ireland. It is the first report to involve the Office of the Qualifications and Examinations Regulator (Ofqual) as the independent qualifications regulator for England, and builds on the report produced last year by the Qualifications and Curriculum Authority (QCA), the Department for Children, Education, Lifelong Learning and Skills (DCELLS) and the Council for Curriculum Examinations and Assessment (CCEA).

This report provides an overview of the scale, activity and players within the qualifications market. It brings together information already in the public domain into a single document making it more accessible to suppliers and users of qualifications.

There are various explanations for the trends in the information provided within this report, and we can draw the following conclusions, with some certainty.

- The number of recognised awarding organisations has continued to grow despite some mergers and acquisitions. Part of this growth arises from the recognition of "employer organisations" that have taken on the traditional role of awarding organisations for the first time, with, for example, Flybe, McDonalds and Network Rail recently gaining recognition.
- There has been growth in the recognised qualifications market between 2002 and 2008. This has been shown as follows.
 - There has been year-on-year growth in numbers of qualifications on offer across awarding organisations. Vocationally Related Qualifications (VRQs) and National Vocational Qualifications (NVQs) have increased in number. New specifications in general qualifications and Diploma-related courses have also made a significant impact on overall numbers.
 - Numbers of achievements gained show upward trends.
 - There are small changes in market share between awarding organisations for general (i.e. GCE and GCSE) qualifications.
 - There is evidence that some of the awarding organisations are realigning their portfolio to prepare for the Qualifications and Credit Framework (QCF).

- There are signs of polarisation in the vocational qualifications¹ market (in terms of numbers of achievements) as the gap between the larger and medium-sized awarding organisations is increasing. The seven largest awarding organisations account for 57 per cent of the market share as measured by number of achievements awarded.

This report provides a useful overview of the current qualifications market and marks a starting point to providing greater visibility of market information before the regulators assume a larger role in regulating the efficiency and value for money of the qualifications sector.

¹ The term "vocational qualifications" is used in this report to differentiate this section of the qualifications market from the general qualifications addressed before. In the strictest sense, the qualifications referred to also include some "other general" qualifications such as grade level music qualifications, which are not actually "vocational" in content. For the purposes of simple reporting we have grouped all non-general qualifications into the "vocational" section of the report.

Introduction

This report has been compiled by Ofqual, DCELLS and CCEA, the qualifications regulators for England, Wales and Northern Ireland respectively.

Purpose

This report provides factual information about the qualifications market, which will help stakeholders in their strategic thinking and raise awareness of the levels of activity in this market. It brings together data from several public sources to provide a single reference point about the qualifications market and its participants.

Objectives

This report covers two areas:

- the supply of qualifications – in particular it reviews 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 demand for qualifications – in particular the trends in qualification demand both by type and sector.

Scope

The report:

- combines information from several published sources
- covers vocational and general 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, where recognition means that they benefit from being part of a nationally recognised qualifications framework, with monitoring of standards to increase the level of trust in qualifications suppliers

² Numbers of accredited qualifications are taken from the National Database for Accredited Qualifications (NDAQ); counts are based on data snapshots taken at specific date points and are at the full Qualification Accreditation Number (QAN) level. Units, pathways or specifications are not included in the qualification counts.

- shows some indicators of business activity of the major organisations across all their markets
- shows the market share of awarding organisations for the different types of qualifications based on qualification achievements
- uses information published or made available for use by the qualifications regulators for monitoring purposes³.

This report does not:

- 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 is commercially confidential
- analyse the unrecognised qualifications market, namely the market for qualifications not accredited by the regulators⁴.

³ Data on numbers of certificates awarded (achievements) is taken from two sources: vocational qualification data (excluding Key Skills) is from the Ofqual Statistics Database, which collects certification data from awarding organisations on a quarterly basis; general qualification data is provided by the Joint Council for Qualifications.

⁴ The following link is to a report compiled by PricewaterhouseCoopers on behalf of QCA, within this are some estimates and references to the unrecognised qualifications market:

http://www.ofqual.gov.uk/files/pdf_05_2239full_report.pdf

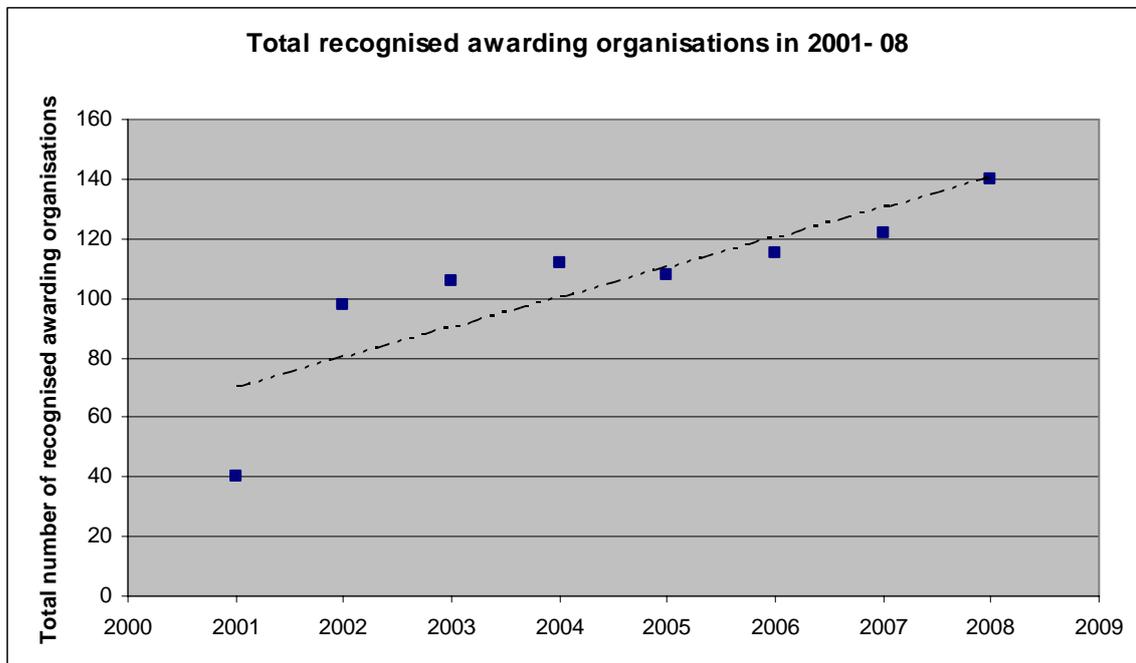
Supply in the qualifications market

Awarding organisations

Number of recognised awarding organisations

The number of awarding organisations recognised by the qualifications regulators has increased steadily in recent years, after a sharp increase between 2001 and 2002. We can attribute this increase to new qualifications areas entering into the focus of the regulators, and a greater range of vocationally focused awarding organisations gaining recognition. The regulators first recognised employers as awarding organisations in the period between September 2007 and August 2008. We could expect to see further employers seeking to gain recognition so that the learning they offer will be accredited, providing more currency for those qualifications outside the scope of the employer. It is not yet clear what impact the QCF will have; it is possible that the number of recognised awarding organisations measured will need to be adapted to reflect those that are recognised as unit providers or whole qualification providers.

In September 2008, there were 140 recognised awarding organisations.



Source: NDAQ: extracted for snapshot in September of each year.

There were 20 newly recognised awarding organisations in the period September 2007 and August 2008:

- 8 employers were recognised as awarding organisations for the first time
- 12 other awarding organisations achieved recognition for the first time.

There has been some rationalisation of awarding organisations recently, through mergers which will impact on the total number of recognised awarding bodies on the National Database of Accredited Qualifications (NDAQ). Please see Appendix B for detailed information on mergers.

Information on recognised awarding organisations

Some awarding organisations operate in a number of industry areas beyond the delivery of qualifications. Awarding organisations have a wide variety of ownership, funding and constitutional features, which makes it difficult to compare them, for example, on the basis of total income or other published measures. Many awarding organisations are private companies and most have limited disclosure obligations, therefore access to segmented information about business activities, their costs and profitability is generally limited.

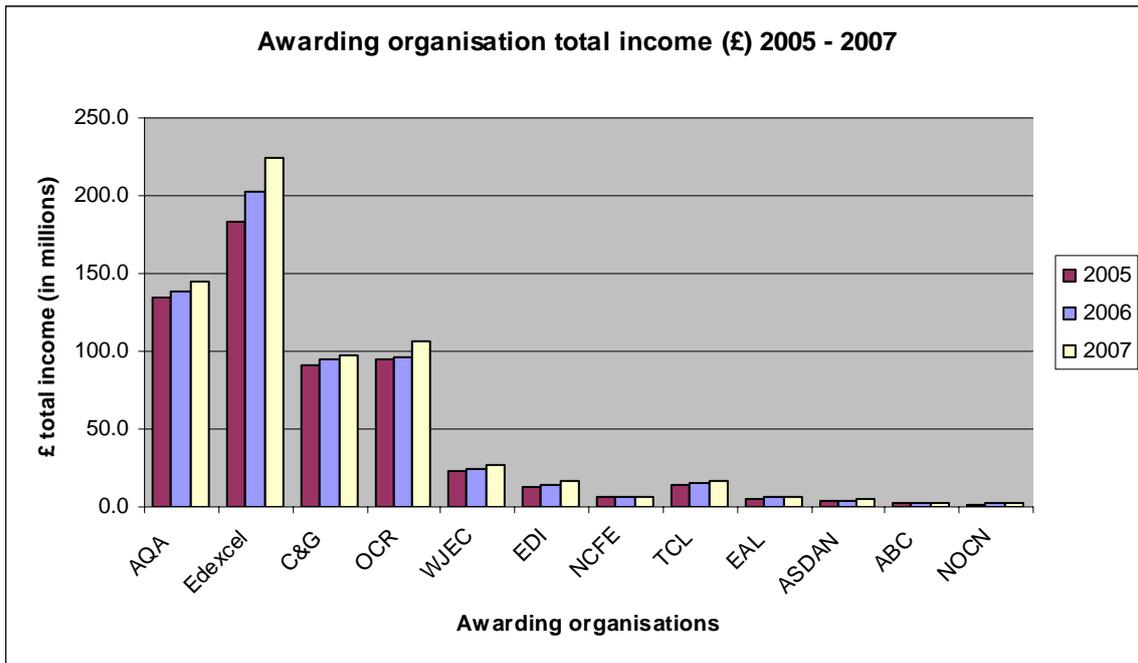
Below, we report on 12 of the larger awarding organisations (as measured by numbers of accredited qualification achievements awarded). They represent a sample of awarding organisations for which we found comparable figures on income on the Companies House website. This is rudimentary in terms of financial analysis and is only a small sample, but it indicates the type of analysis that could inform future reports.

Total income of selected awarding organisations

Total income⁵ is not a pure measure of turnover from activity relating to qualifications, as it will include interest payments, investment yield and any business undertaken that does not limit itself to providing qualifications. Also, differing percentages of the total income could be gained from providing qualifications overseas, which would therefore be outside the scope of the regulators.

While total income gives limited information, it does give an indication of different sizes and power within the market, and year-on-year changes show some market dynamics. Changes in income could, for example, be caused by centres switching business between awarding organisations but may also come from non-awarding business activity.

⁵ Total income is stated in nominal terms and is not adjusted to reflect inflation.



Source: Companies House website, financial accounts for 2005, 2006 and 2007 (where available). Information for 2005 was extracted in November 2007, while 2006 and 2007 information was extracted in January 2009. Where there are differences in the phasing of financial year accounting, we aligned each submission with the year in question with the aim of presenting comparable data. When we extracted this data, some submissions for 2007 were estimated totals, but in the majority of cases we present confirmed totals.

The following table, using figures from the Companies House financial accounts, shows the total income for the listed awarding organisations, apart from The City & Guilds Group, whose details come from an annual report on its website.

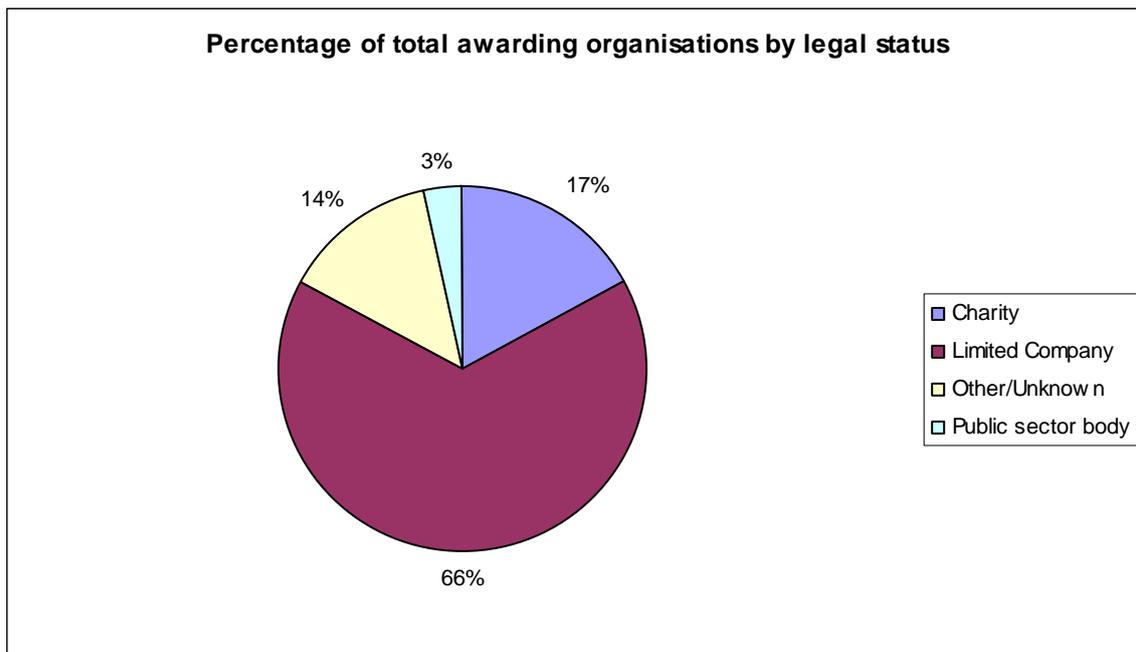
Awarding organisation name	Total income (in millions £)		
	2005	2006	2007
ABC: ABC Awards	2.8	3.0	3.0
AQA: Assessment and Qualifications Alliance	134.8	138.8	144.9
ASDAN: Award Scheme Development Accreditation Network	3.5	4.2	4.9
EAL: EMTA Awards Limited	5.2	6.0	7.0
Edexcel: Edexcel Limited	183.0	202.8	225.0
EDI: Education Development International plc	13.2	14.2	16.3
NCFE	6.0	7.0	7.1
NOCN: National Open College Network	1.5	2.0	2.8
OCR: Oxford, Cambridge & RSA Exams	95.1	96.3	106.7 ⁶
TCL: Trinity College London	13.9	15.4	17.1
The City & Guilds Group	91.5	94.7	97.2
WJEC	22.9	24.8	27.2

Source: Companies House website, financial accounts for 2005, 2006 and 2007 (where available). Information for 2005 was extracted in November 2007, while 2006 and 2007 information was extracted in January 2009. Where there are differences in the phasing of financial year accounting, we aligned each submission with the year in question with the aim of presenting comparable data. When we extracted this data, some submissions for 2007 were estimated totals, but in the majority of cases we present confirmed totals.

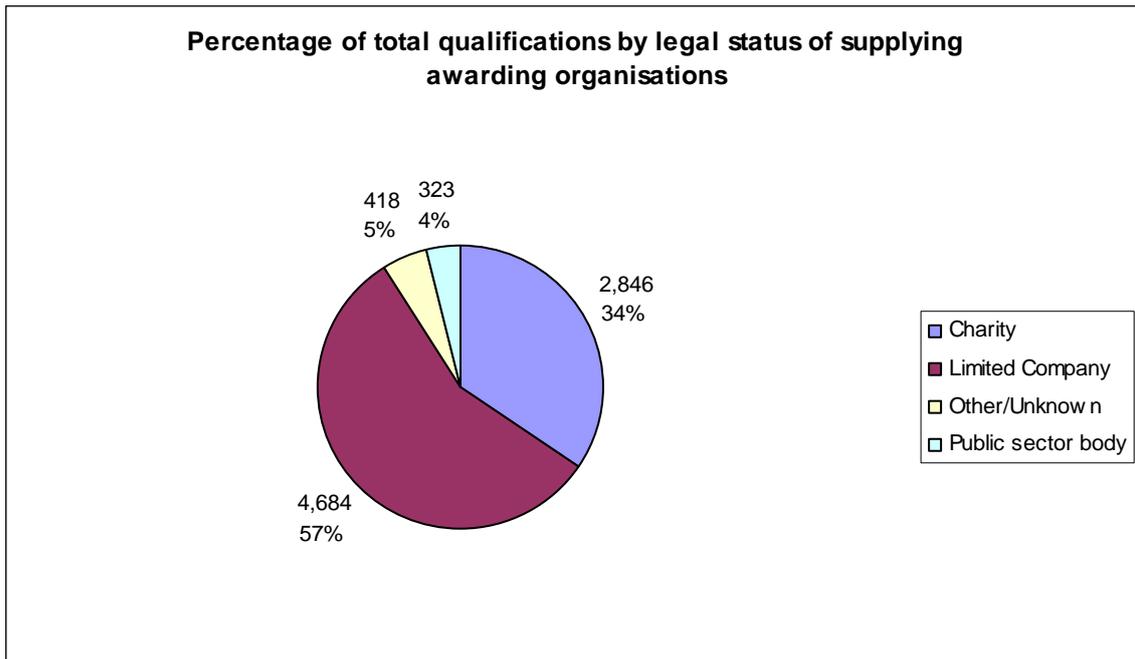
⁶ OCR data for 2007 reports on 10 months, rather than the standard 12-month reporting period.

Awarding organisations' legal status

Using publicly available data, mainly derived from awarding organisations' websites, we can analyse the legal status of recognised awarding organisations (see graph below). This data has 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 (66 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 subsidiary 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 in their own right.

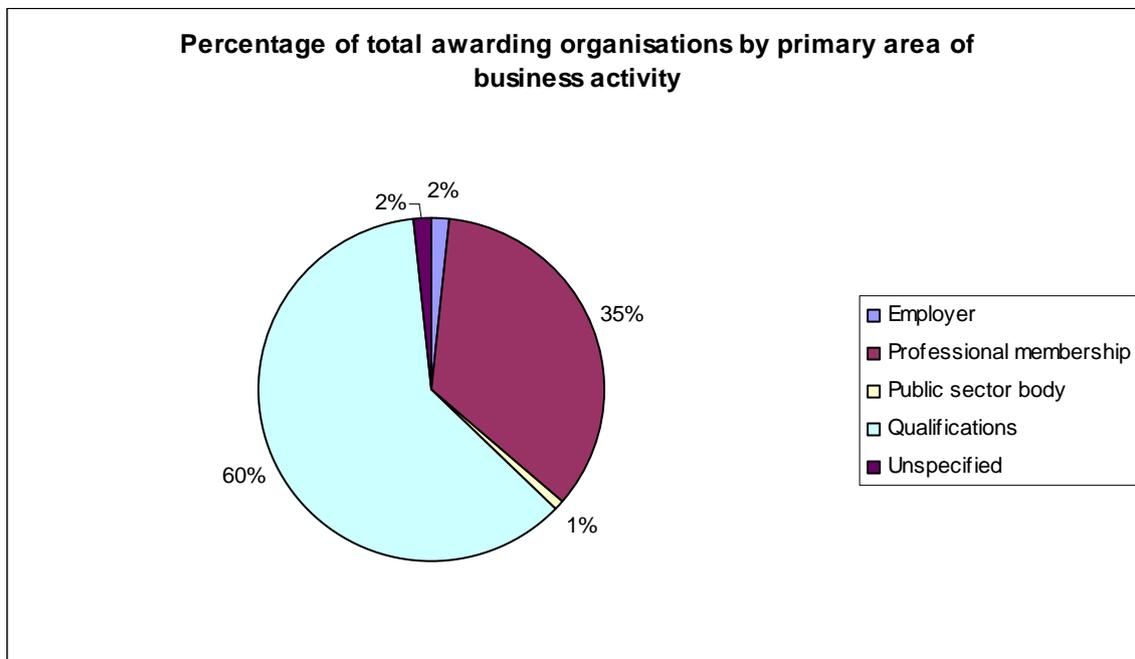


If, as below, the number of accredited qualifications is noted according to the legal status of the awarding organisations, the picture alters, particularly with regard to the charity sector. This is in part due to the size and contribution of The City & Guilds Group and AQA, which account for a sizeable proportion of accredited qualifications in the charity sector.



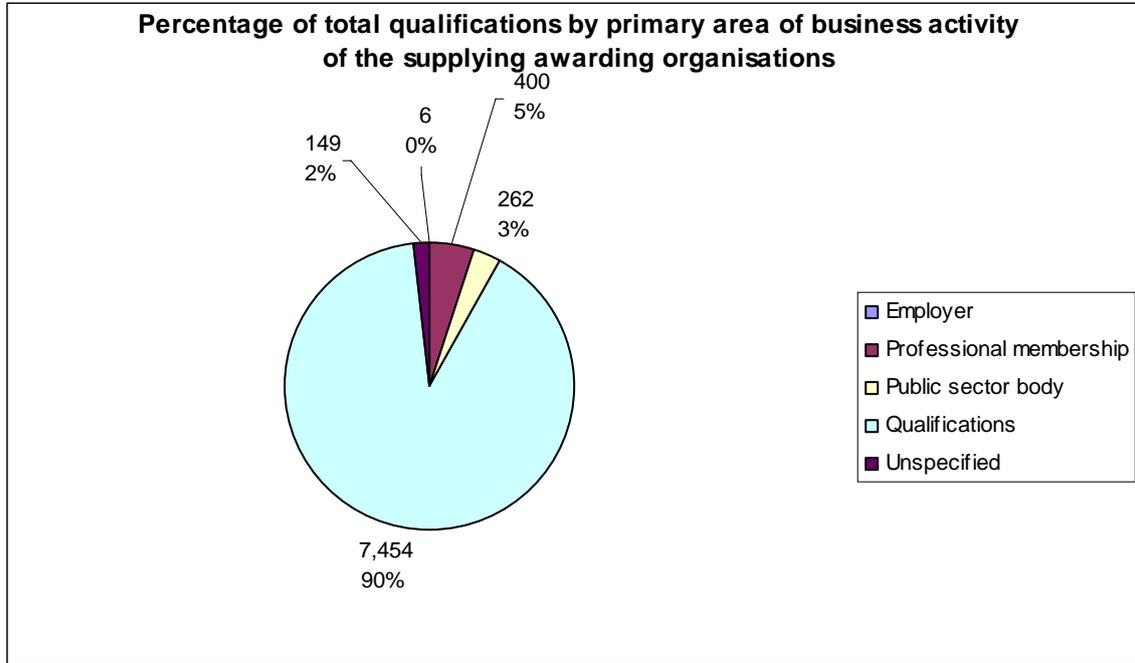
Awarding organisations' primary area of business activity

We examined awarding organisations' websites to gain a greater understanding of the nature of their business, and gathered information on their primary areas of activity.



The graph above shows that the core business for 60 per cent of awarding organisations is to provide qualifications. For the purpose of this graph, "Qualifications" covers accredited and non-accredited. A significant percentage (35 per cent) of awarding organisations' primary business activity is professional membership, where awarding qualifications may be an

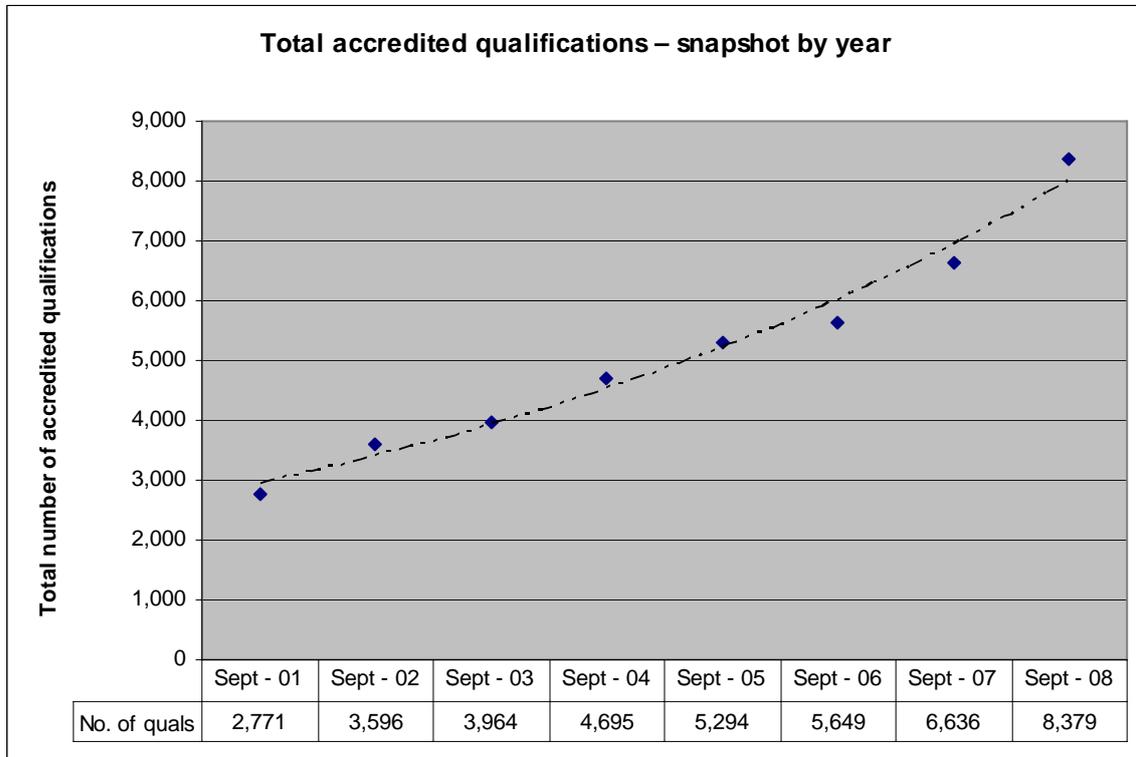
"added value" service to their members. A small percentage (2 per cent) of awarding organisations can be classed as employers, including McDonalds and Flybe.



The graph above shows the numbers and distribution of accredited qualifications across the awarding organisations. It confirms that organisations that primarily work with qualifications, offer a larger number of qualifications, and others offer just the qualifications that complement their main business activity.

Accredited qualifications

Number of accredited qualifications 2001–08



Source: NDAQ: providing a snapshot for 30 September in each year featured, extracted in December 2008.

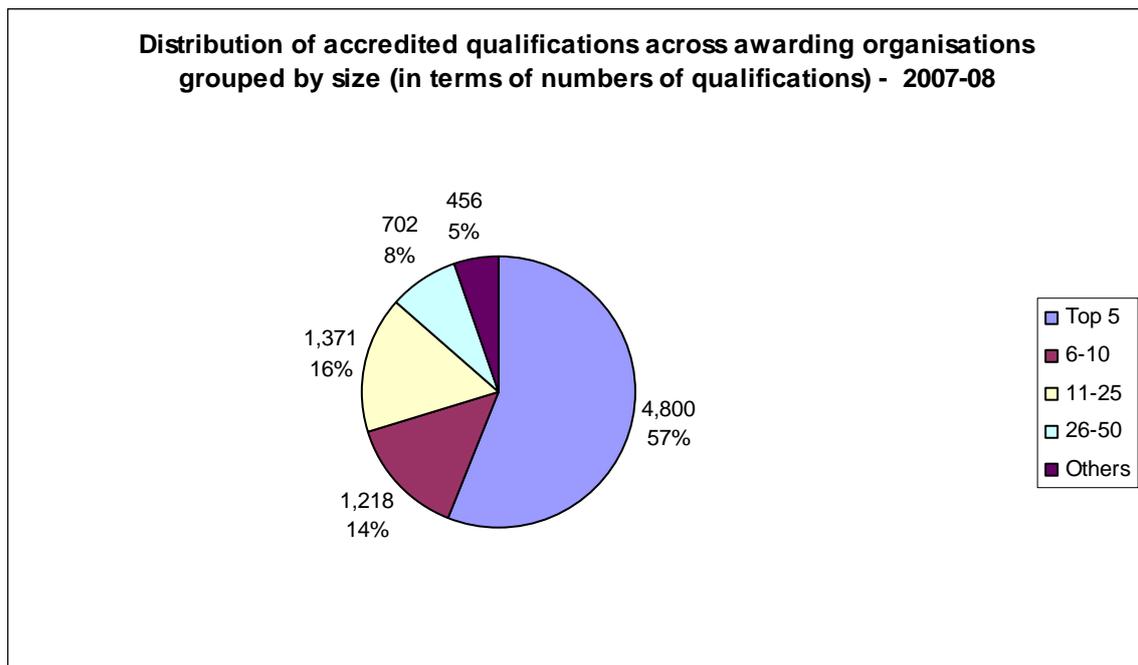
The significant 26 per cent increase in the number of accredited qualifications between 2007 and 2008 can be attributed to:

- expansion of accreditations on the QCF
- new qualifications relating to government policy developments in England, such as Diploma and functional skills
- certain duplication with dual accreditation of old specifications⁷ and new specifications, in GCE, GCSE and in vocational qualifications where awarding organisations are preparing their portfolio for the QCF while continuing to have a presence on the National Qualifications Framework (NQF).

⁷ 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 as the older version is replaced by the newer version.

Distribution of accredited qualifications across awarding organisations

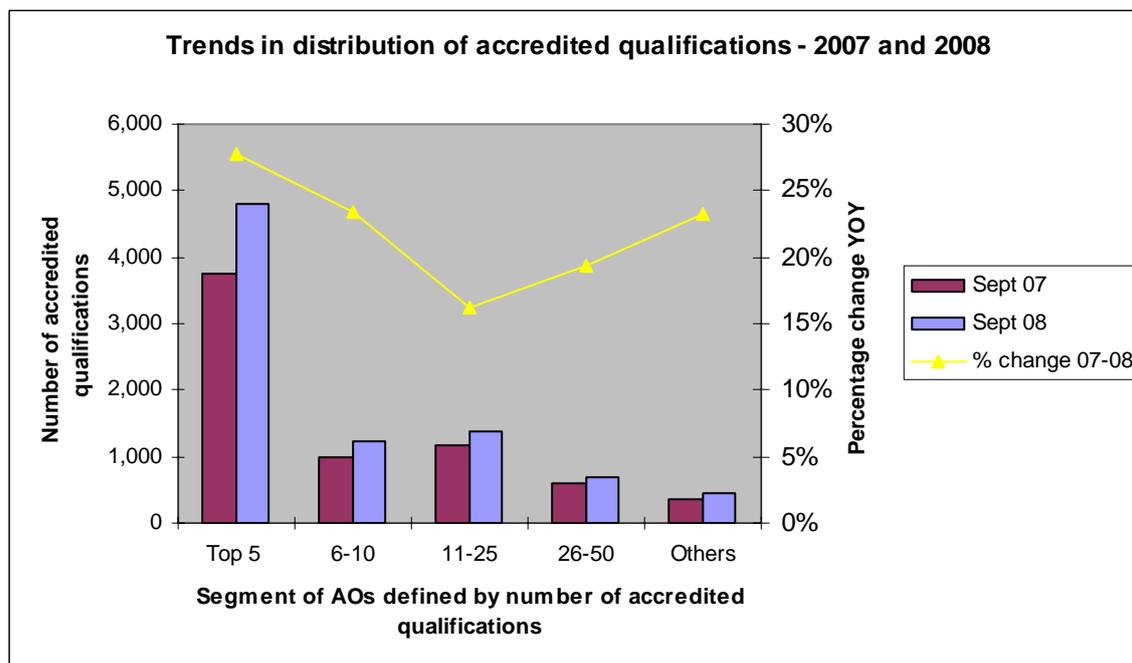
By ranking the awarding organisations by the number of accredited qualifications they have, it is clear that a small number of large awarding organisations continue to offer the majority of qualifications. The larger five (AQA, the City & Guilds Group, Edexcel, OCR and WJEC) continue to dominate the market. There is evidence of increased polarisation of the market in terms of numbers of qualifications offered. Last year, the gap between the larger and medium-sized awarding organisations increased; this year, the top five account for 57 per cent of the total number of accredited qualifications, compared to 55 per cent last year.



Source NDAQ; 2007 figures extracted in December 2008 and 2008 figures extracted in January 2009.

The increased share of the larger five awarding organisations equates to 1,042 more accredited qualifications than last year. Part of this increase is attributable to the dual running of old specifications and new specifications in GCSEs and GCEs, which will reduce in number when the old specifications are withdrawn.

There is also evidence that the smaller awarding organisations (i.e. not the top 50) have begun to increase the size of the portfolio of accredited qualifications, and collectively their accredited qualifications have grown from 370 to 456.



Source: NDAQ; 2007 figures extracted in December 2008 and 2008 figures extracted in January 2009.

Number of accredited qualifications by qualification type

The following table shows the supply of qualification variants at all awarding organisations, at differing levels of attainment, length of learning and within each qualification type.

There are various reasons behind the growth in numbers of accredited qualifications:

- In GCSEs and GCEs, there has been dual accreditation of specifications, with older ones overlapping new ones by one year. The figure is expected to reduce by approximately half in September 2010 when the old ones are phased out.
- In preparation for the QCF, awarding organisations are realigning their qualifications portfolio to fall in line with possible changes to funding arrangements. For example, VRQs continued to grow steadily year on year as, compared with some other qualifications, they are more closely aligned to the QCF requirements.
- VRQs can be selected as additional and specialist learning (ASL) within Diploma qualifications.
- All qualifications, except basic skills, Free-Standing Mathematics Qualification (FSMQ) and key skills, have increased in numbers.

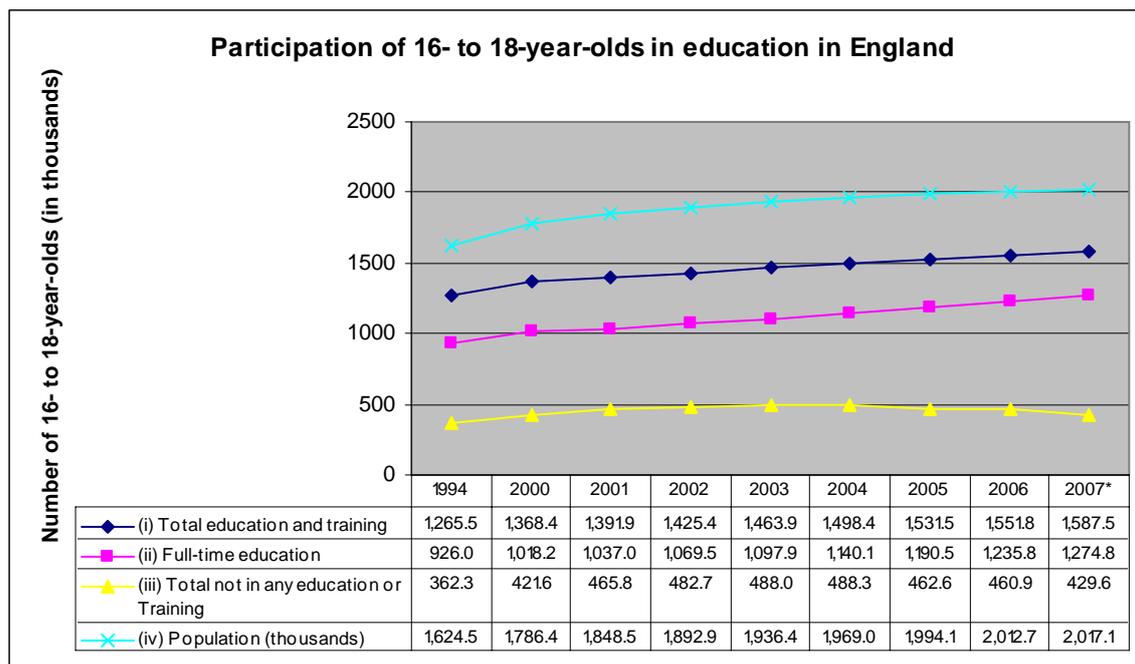
Qualification Type	Sept 01	Sept 02	Sept 03	Sept 04	Sept 05	Sept 06	Sept 07	Sept 08
Advanced Extension Award		17	17	16	18	18	18	19
Basic skills	18	38	56	58	72	72	78	78
Diploma							68	140
English for speakers of other languages		43	56	82	103	97	118	141
Entry level	93	108	115	165	203	272	272	281
Free-Standing Mathematics Qualification	33	35	35	24	24	12	22	13
Functional skills							83	84
General Certificate of Education A Level	187	188	189	217	258	251	435	452
General Certificate of Education AS Level	195	196	198	226	268	259	444	454
General Certificate of Secondary Education	274	331	346	357	376	420	370	688
General National Vocational Qualification	119	119	77	75	75	33		
Higher Level	3	19	145	266	312	337	367	384
Key skills	216	216	216	381	381	360	360	356
National Vocational Qualification	1,357	1,340	1,336	1,255	1,221	1,291	1,340	1,345
Occupational qualification	17	62	84	91	90	73	78	89
Other general qualification	38	121	129	178	244	346	407	585
Principal learning							36	79
Project							14	18
Qualifications & Credit Framework qualification						5	145	1,034
VCE AS level	13	13	13	12	12			
Vocational Certificate of Education	80	80	80	80	80			
Vocationally related qualification	128	666	872	1,212	1,557	1,803	1,981	2,139
Total	2,771	3,592	3,964	4,695	5,294	5,649	6,636	8,379

Source: NDAQ, providing a snapshot for September in each year featured, extracted in December 2008.

Demand for qualifications

Participation in education

The following graph shows the numbers of young people in full-time education and training in England from 1994. There is an upward trend in the numbers of those in full-time education, and developments such as raising the school leaving age will create an increase in demand for qualifications.



Source: 'Statistical First Release for England' only on the Department for Children, Schools and Families website (www.dcsf.gov.uk). Extracted in March 2009 when the figures stated for 2007 were still provisional.

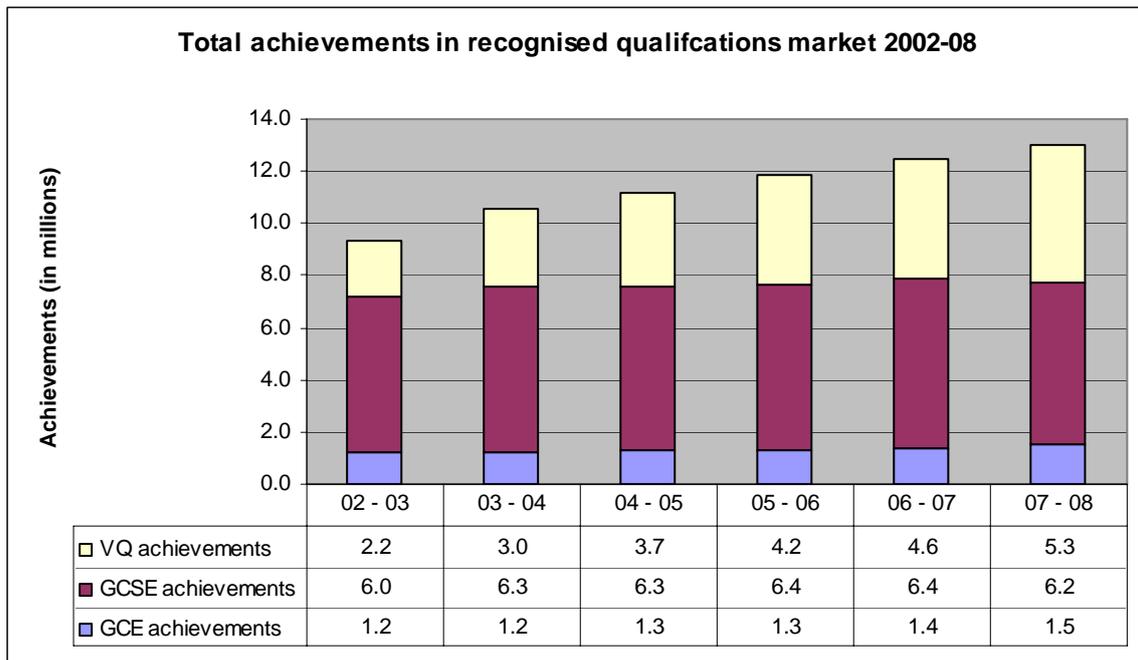
The proportion of 16- and 17-year-olds participating in education and training has increased steadily to reach 91 per cent for 16-year-olds and 82 per cent for 17-year-olds in 2007.

Participation by 18-year-olds had generally remained stable at around 61 per cent since 2001 but increased to 63 per cent in 2007. In 2007, 16-year-old boys (with an 87 per cent participation rate) were less likely to be in any education or training than 16-year-old girls (92 per cent).

In Northern Ireland there has been a similar upward trend in participation in education and training. Participation rates for 16- and 17-year-olds increased from 71 per cent in 2000 to 92 per cent in 2007.

Total qualification market by number of achievements awarded

"Number of achievements" refers to the number of grades/results/qualifications passes that were recorded for the academic year in question. The source of data for general qualifications is the Joint Council for Qualifications (JCQ) on behalf of its member awarding organisations⁸. Vocational qualification data is provided to the regulators by awarding organisations and accessed through Ofqual's statistics database. All data used is available to the public on request.



Source: JCQ summer results data 2003–08 and Ofqual statistics database 2003–08.

The vocational qualification sector has shown the strongest growth with nearly 700,000 more achievements this year compared to last year, and more than one and a half times the number of achievements compared to 2002–03. Total GCE achievements have also shown a steady increase with over 100,000 more achievements this year compared to last year. The number of total GCSE achievements has fluctuated since 2002–03 and this year has shown a decrease from last year.

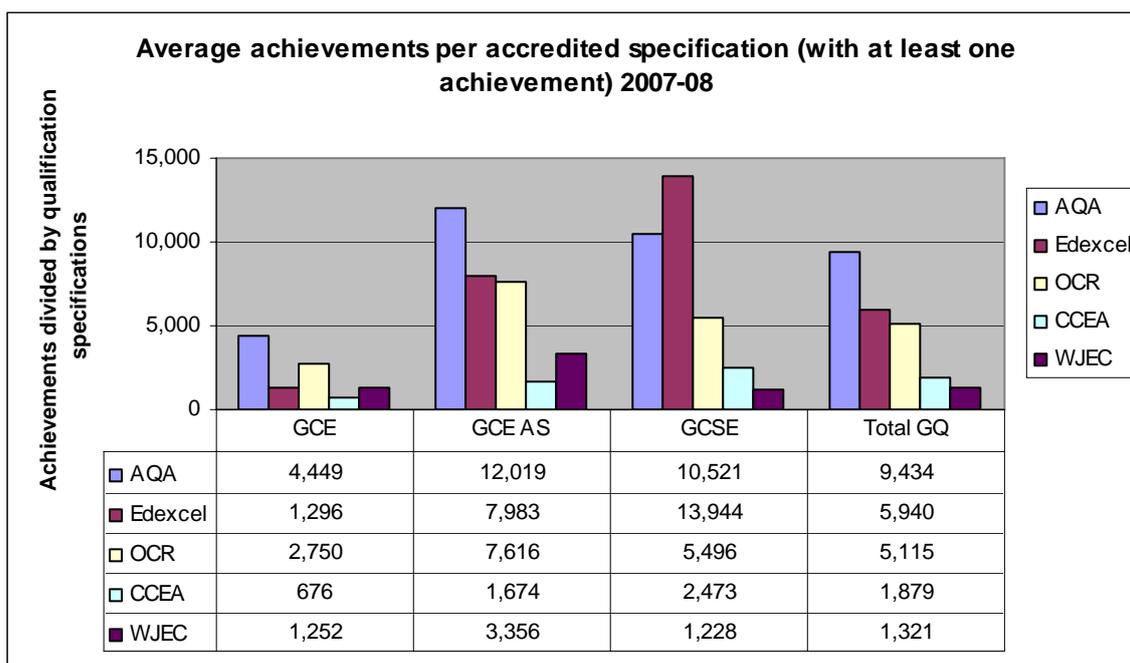
General qualifications market

For general qualifications, the information available shows the number of achievements, often referred to as results in general qualifications, in the summer examination series. By dividing the total number of achievements at each awarding organisation by the total number of their

⁸ Only JCQ results data for the summer series has been presented. In future reports, we will amalgamate the results in winter and spring series, to present the total for whole year.

accredited qualifications, we can present a measure of average achievements per accredited qualification.

AQA has the greatest number of achievements per specification in GCEs and GCE AS levels, whereas Edexcel has the largest number in GCSEs. The achievement per specification measure will vary by subject area, as some awarding organisations will have higher take-up in some subjects than in others.



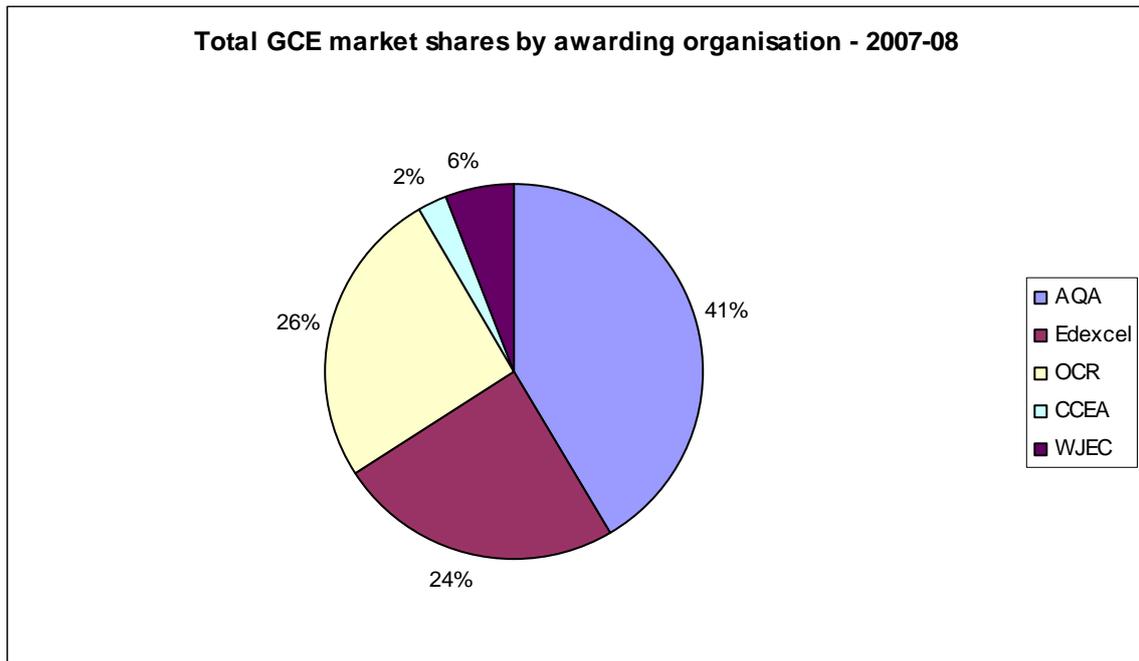
Source: JCQ summer results data 2007-08 (provisional) and NDAQ.

Achievements at GCE

Total number of GCE (AS and A2) candidate achievements by year (in millions)						
Year	02-03	03-04	04-05	05-06	06-07	07-08*
Total number of GCE achievements	1.21	1.22	1.26	1.31	1.41	1.50

Source: JCQ summer results data 2003-08. In line with UCAS tariff points, an A level counts for one achievement, while an AS level counts for half an achievement.

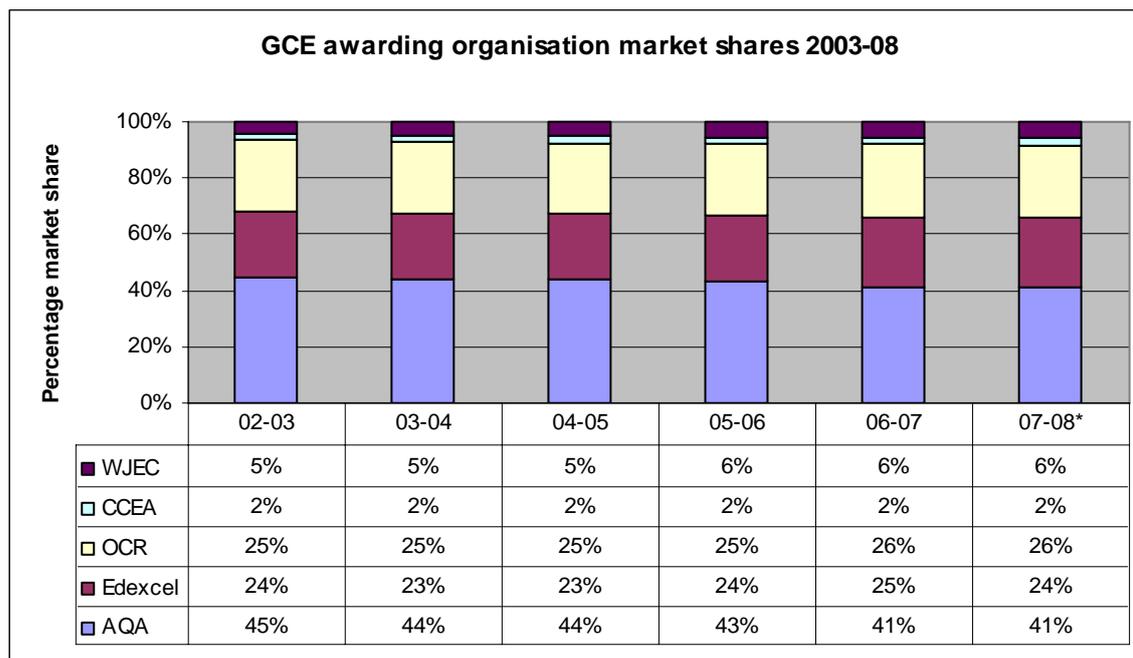
*2007-08 data is provisional due to phasing of data collection.



Source: JCQ summer results data 2007–08 (provisional data). In line with UCAS tariff points, an A level counts for one achievement, while an AS level counts for half an achievement.

At 41 per cent, AQA continues to hold the largest share of the GCE market, with OCR at 26 per cent and Edexcel at 24 per cent. The market remains relatively static compared to previous years.

The following graph reviews the yearly trends in GCEs since 2003. It shows that, while market share changes are small, AQA has lost market share almost every year; Edexcel, OCR and WJEC have steadily grown their market shares compared to 2003.



Source: JCQ summer results data 2003–08. *Provisional data for 2007–08. In line with UCAS tariff points, an A level counts for one achievement, while an AS level counts for half an achievement.

Achievements at GCSE

The following table provides an overview of achievements at GCSE. It shows that the number of GCSE achievements has fluctuated year on year.

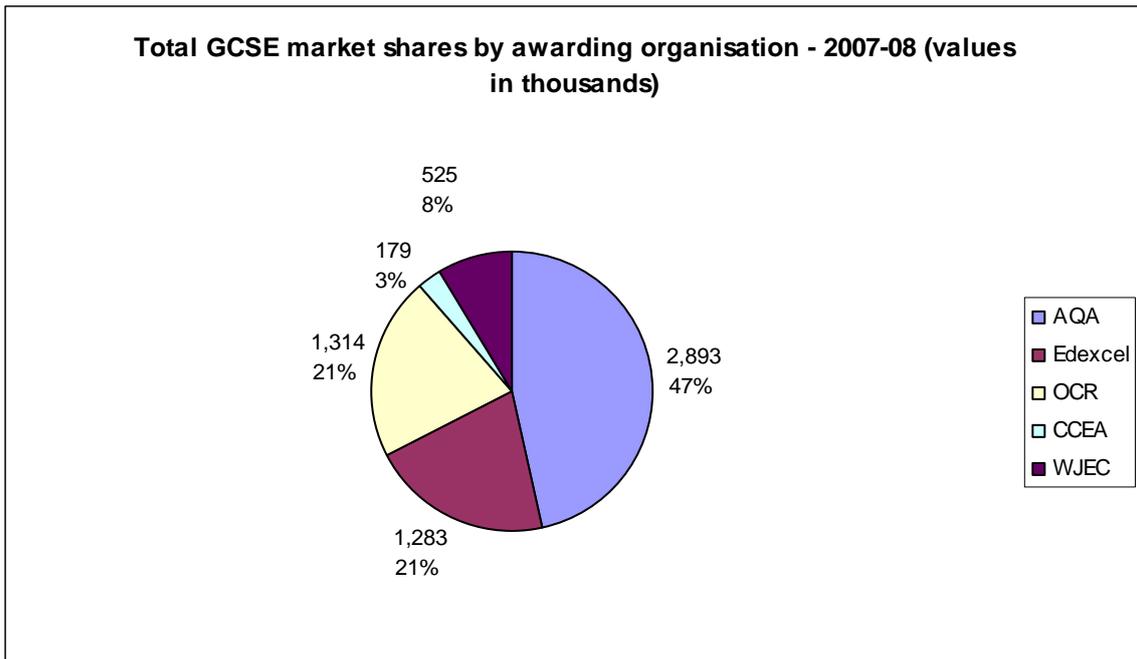
In 2007–08, there was a decrease of nearly 240,000 achievements, compared with 2006–07. JCQ's August 2008 news release for GCSE results⁹, that a smaller cohort of 16-year-olds (reduced by approximately 6,000), contributed to this decrease.

Number of GCSE candidate achievements by year (in millions)						
Year	02–03	03–04	04–05	05–06	06–07	07–08*
Total number of all GCSE achievements	6.0	6.3	6.3	6.4	6.4	6.2

Source: JCQ summer results data 2003–08. *Provisional data for 2007–08. In line with UCAS tariff points, each Short Course counts as half of a full GCSE. Double awards count as two GCSE achievements.

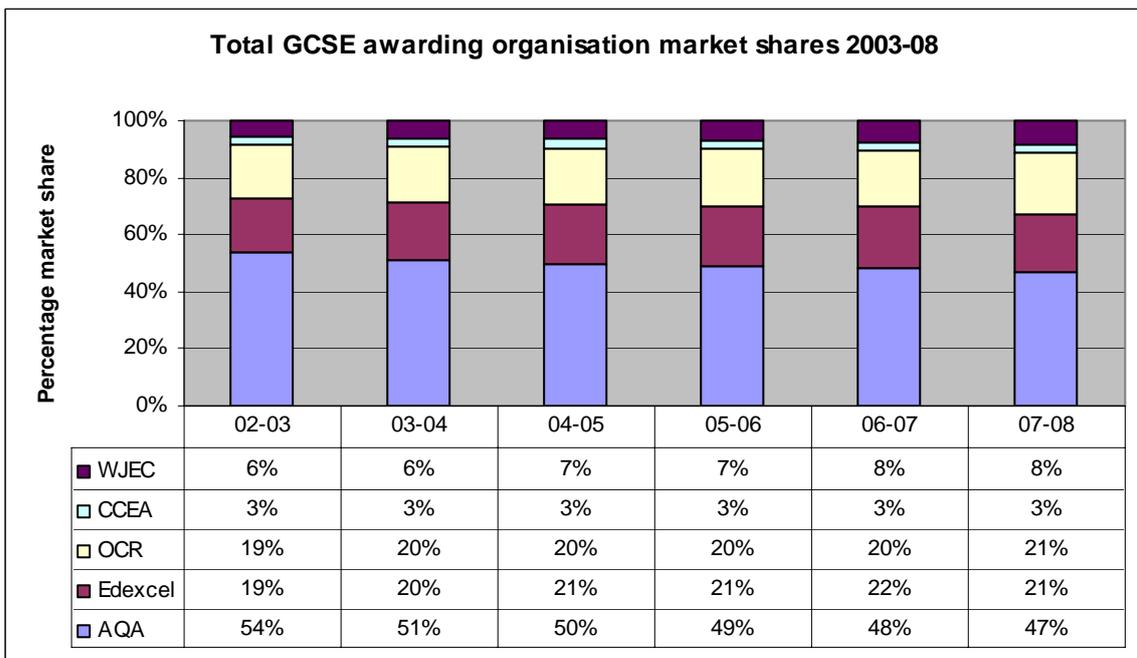
⁹ JCQ New Release on GCSE Results – 21 August 2008, see following link:

http://www.jcq.org.uk/attachments/published/1021/GCSE_per_cent20News_per_cent20release.pdf



Source: JCQ summer results data 2007-08 (data provisional). In line with UCAS tariff points, each Short Course counts as half of a full GCSE. Double awards count as two GCSE achievements.

The following graph shows that although AQA continues to hold the largest share of the market, its share has declined. AQA has lost 7 percentage points of the market share since 2003. Edexcel has lost 0.8 percentage points on last year, while OCR has increased by 1.5 percentage points. CCEA's market share has remained static since last year, while WJEC's has grown by 0.7 percentage points.



Source: JCQ summer results data 2003-08. Provisional data for 2007-08. In line with UCAS tariff points, each Short Course counts as half of a full GCSE. Double awards count as two GCSE achievements.

Achievements in vocational qualifications

Number of vocational qualifications (VQ) achievements by year (in millions)						
Year	02–03	03–04	04–05	05–06	06–07	07–08
Total number of all VQ achievements	2.2	3.0	3.7	4.2	4.6	5.3

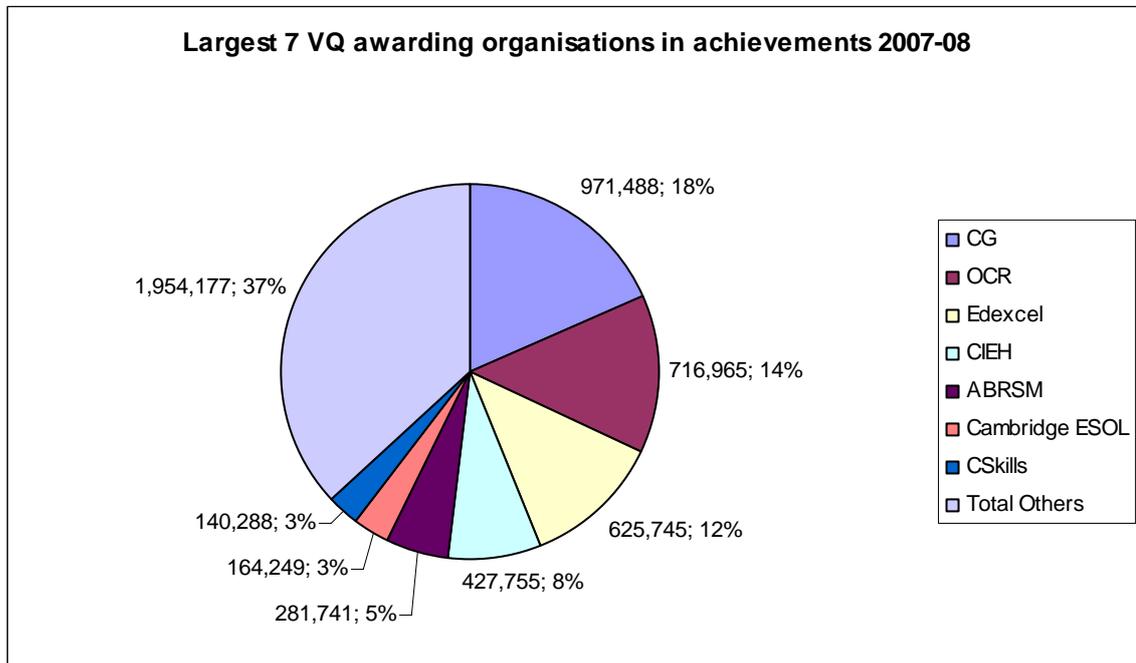
Source: Ofqual statistics database providing snapshots for 2007–08, extracted in January 2009.

There has been a 15 per cent increase in VQ achievements in the last year, equivalent to an increase of nearly 700,000. The following sections of the report highlight what has driven this increase.

All data used in this section of the report is taken from the Ofqual statistics database. Awarding organisations are the original source of all data used here. NVQ data has always been formally audited as it was used as a basis for collecting the NVQ levy. Data for other vocational qualifications has been provided on a quarterly basis by awarding organisations. The measure of number of achievements is the number of qualifications completed by all candidates. It provides a useful basis for measuring awarding organisations' shares of the total market. However, it does not differentiate between the length of courses, which can range from one day to two years.

The QCF will ultimately provide a standard currency for learner achievement across the qualifications system through the award of credit at different levels. The systems supporting the QCF might enable in-depth analysis by market segments, for example, by certificate, diploma and award or by methods of assessment relating to the qualification.

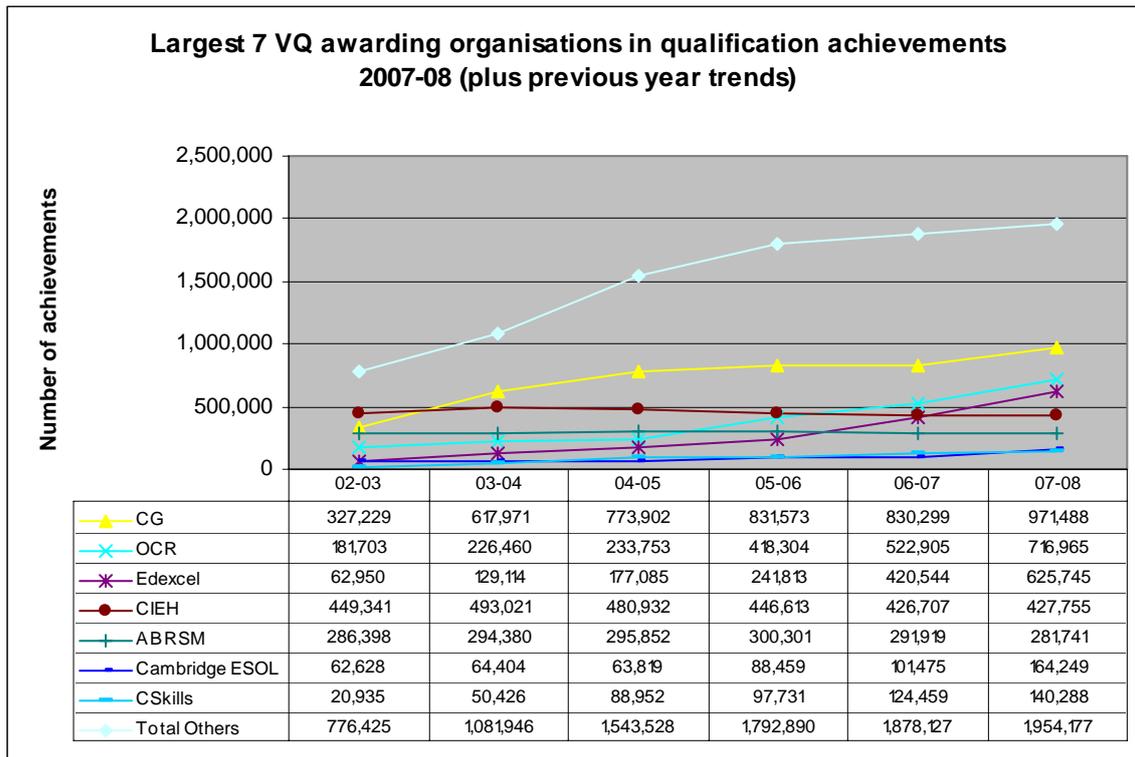
Vocational achievements by awarding organisations



Source: Ofqual statistics database providing snapshots for 2007–08, extracted in January 2009.

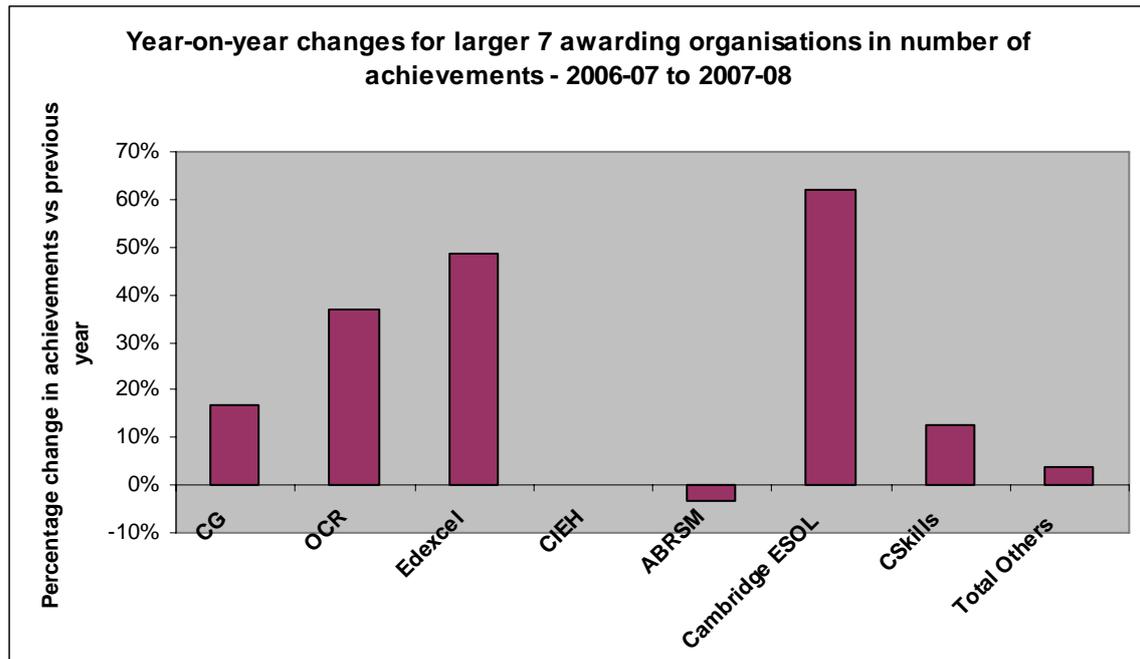
We focus on the seven largest awarding organisations, based on the number of achievements. The graph above shows that The City & Guilds Group (CG)¹⁰ continues to hold the largest market share in the vocational sector with 18 per cent. OCR (14 per cent) and Edexcel (12 per cent) are the next largest participants. Other key players are the Chartered Institute of Environmental Health (CIEH) (8 per cent) and the Associated Board of the Royal Schools of Music (ABRSM) (5 per cent). Notably, these latter two awarding organisations have a large number of achievements concentrating on specialist subject areas, compared to the former three, which offer qualifications over a number of subject areas. "Total Others" comprises more than 100 awarding organisations.

¹⁰ The City and Guilds Group includes the subsidiary brands of (the original) City and Guilds, National Proficiency Tests Council (NPTC), Institute of Leadership and Management (ILM), Hospitality Awarding Body (HAB), and Pitmans Qualifications (PQ). Despite joining the City and Guilds Group in the past few years, the historical data for these subsidiary brands has been grouped together for the purposes of this report.



Source: Ofqual statistics database providing a snapshot for each year featured, extracted in January 2009.

In the table above we can review the number of achievements on a year-by-year basis. For example, The City & Guilds Group, OCR and Edexcel have had an increase in the number of achievements since last year. ABRSM had a decline in achievement numbers and CIEH had a small increase, but both have seen their share of the total qualifications market gradually eroded.



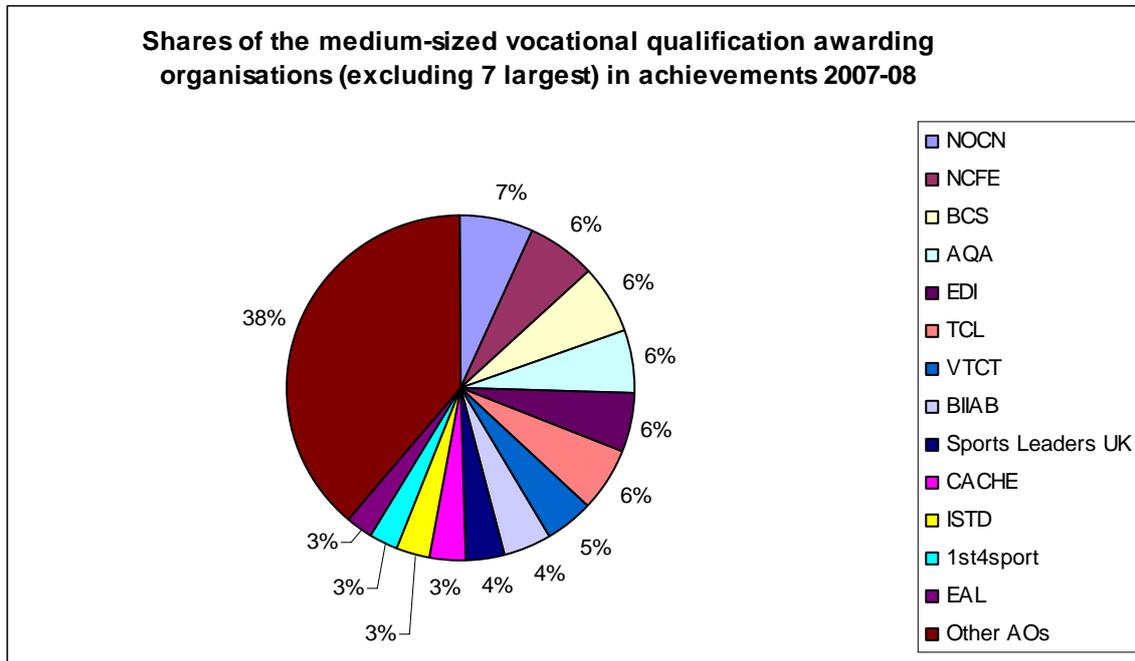
Source: Ofqual statistics database providing a snapshot for each year featured, extracted in January 2009.

The graph above shows the percentage changes, from 2006–07 to 2007–08, in the number of achievements awarded at each of the seven larger awarding organisations in the vocational market. Edexcel's total achievements have grown by almost 50 per cent from and Cambridge ESOL by 62 per cent¹¹.

Since 2003, the number of achievements for other awarding organisations has increased. Awarding organisations included under "Total Others" saw an increase on last year of 6 per cent (110,000) achievements. This is more modest than the average growth in achievements at all awarding organisations, with the "mean" increase recorded at 15 per cent. We can therefore infer that the growth in achievements in the vocational sector has been driven by The City & Guilds Group, OCR and Edexcel, contributed to by the collective other awarding organisations.

¹¹ This is based on provisional data which is currently being verified by Cambridge ESOL.

Market share and variances in share of the medium-sized¹² vocational awarding organisations



Source: Ofqual statistics database, providing snapshots for 2007–08, extracted in January 2009.

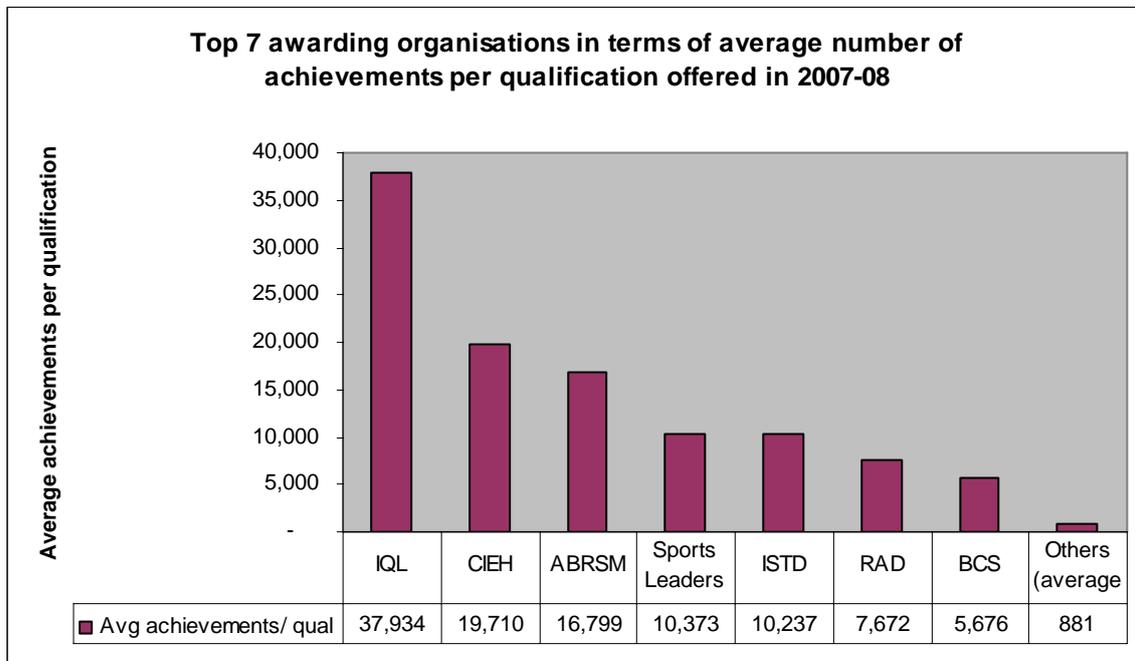
The above graph shows the significant contribution that the medium-sized awarding organisations make to the market, as measured by numbers of achievements awarded. We have excluded the larger seven awarding organisations (see previous graphs) which make up 63 per cent of the vocational market, to show the proportions of the market held by medium-sized awarding organisations.

¹² For the purposes of presentation we have classified the awarding organisations as those with fewer than 140,000 achievements but more than 50,000 achievements in 2007–08.

Market in terms of average numbers of achievements per qualification offered

Some awarding organisations concentrate on highly specialised areas with large volumes over a narrow range of qualifications. The following graph shows the seven vocational awarding organisations with the highest average achievements per qualification (where at least one award has been made in that year). The average number of achievements per qualification across all vocational awarding bodies is 881; this would be higher but for the large numbers of smaller and/or highly specialised awarding organisations.

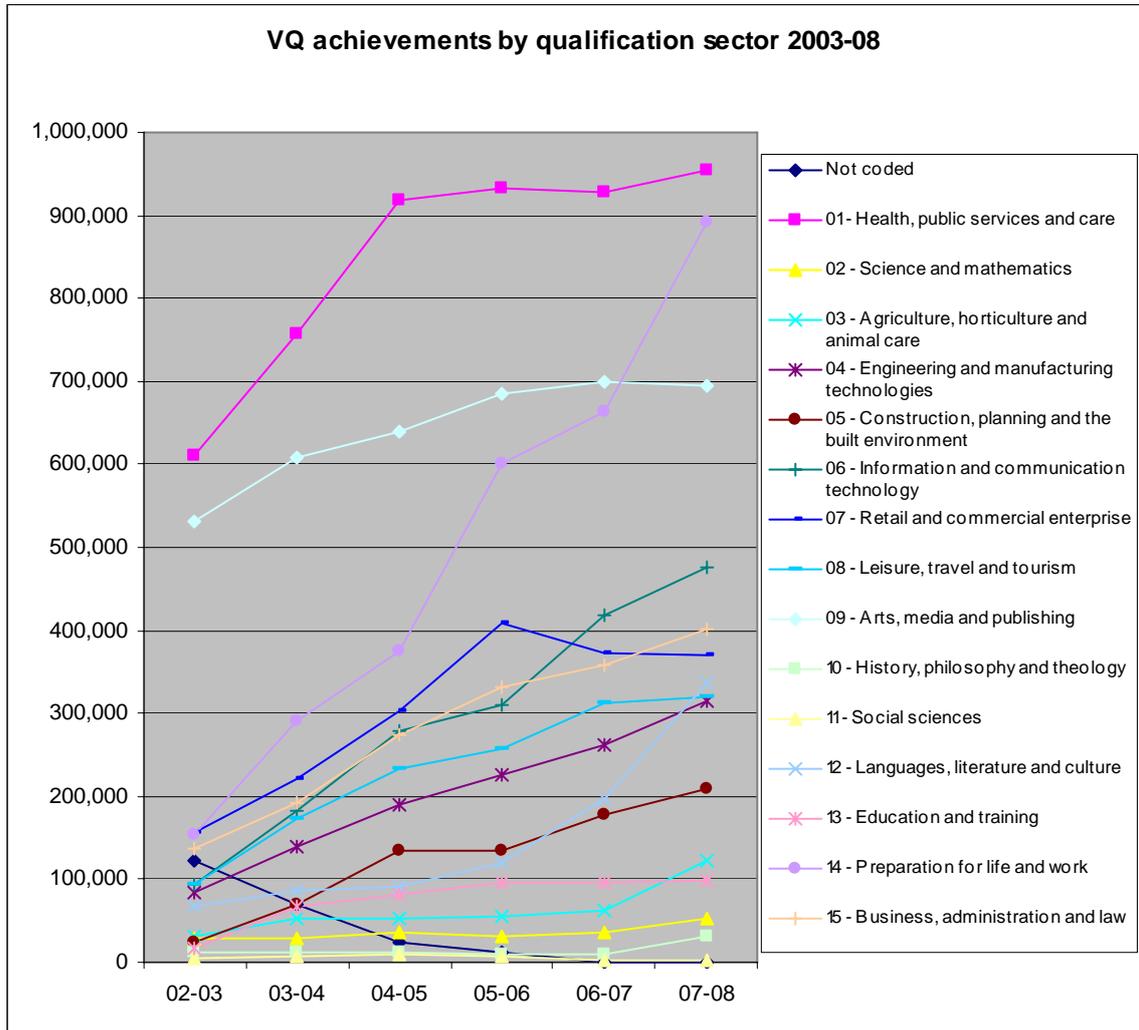
To provide context we could compare these numbers with the general qualifications sector, which has an average of 4,948 achievements per qualification; AQA has the highest performance in GCSEs, with an average of 12,019 achievements per qualification specification.



Source: Ofqual statistics database and NDAQ, providing snapshots for 2007–08, extracted in January 2009.¹³

¹³ For the purposes of this calculation, only qualifications for which there was at least one award were used as the denominator.

Number of achievements awarded broken down by vocational sector



Source: Ofqual statistics database providing a snapshot for each year featured, extracted in January 2009.

The above graph shows the breakdown of the vocational market, according to the number of achievements by sector, and it groups different industry-related areas. Most of the sectors are growing in line with the overall qualifications market. Preparation for life and work, which is a grouping of similar qualifications rather than a vocational or technical sector, showed a particularly strong growth of 34 per cent to 891,000. Agriculture, horticulture and animal care; History, philosophy and theology; and Languages, literature and culture also showed strong growth. Numbers of achievements have declined in Arts, media and publishing, and have stabilised in Retail and commercial enterprise, despite growth elsewhere. It would be interesting in future reports to track the progress in different sectors with regard to the pressures brought by the economic climate.

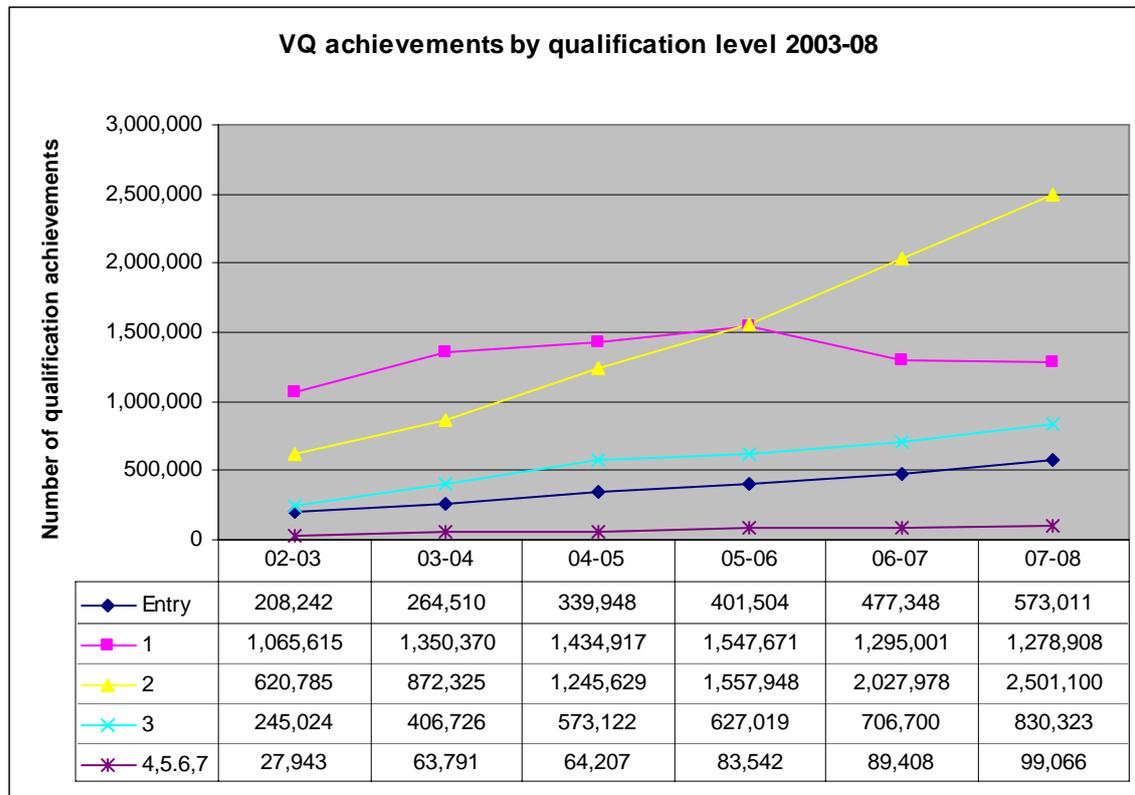
Further figures on the size of achievements (in thousands) and the achievement trends of the different vocational sectors are shown in the chart below.

Sector size by number of achievements/ year (in thousands)	02–03	03–04	04–05	05–06	06–07	07–08
01: Health, public services and care	610.3	756.4	919.3	931.6	927.0	955.0
02: Science and mathematics	28.6	28.8	35.6	31.1	35.3	53.4
03: Agriculture, horticulture and animal care	31.6	53.7	53.9	55.1	62.8	123.5
04: Engineering and manufacturing technologies	83.7	139.2	190.8	225.1	261.6	315.0
05: Construction, planning and the built environment	23.7	70.2	134.7	135.0	177.3	210.3
06: Information and communication technology	94.9	182.2	279.3	309.4	417.7	475.5
07: Retail and commercial enterprise	156.8	220.6	302.4	408.1	371.8	370.4
08: Leisure, travel and tourism	94.1	173.1	232.2	258.0	313.0	320.5
09: Arts, media and publishing	531.3	608.1	639.4	684.0	699.1	694.9
10: History, philosophy and theology	11.0	10.8	13.2	10.4	10.3	31.0
11: Social sciences	4.1	7.0	9.3	7.1	3.5	3.0
12: Languages, literature and culture	67.9	87.1	92.4	120.9	198.1	337.5
13: Education and training	16.7	68.1	80.6	96.1	95.5	99.5
14: Preparation for life and work	153.0	292.0	375.1	601.1	664.0	891.0
15: Business, administration and law	137.3	191.5	274.7	332.5	359.0	401.7
Not coded ¹⁴	122.6	68.8	24.9	12.2	0.2	0.004
Total	2,168	2,958	3,658	4,218	4,596	5,282

Source: Ofqual statistics database providing a snapshot for each year featured, extracted in January 2009.

¹⁴ It should not be assumed that the "Not coded" qualifications have filtered into other sectors. They were non-active qualifications when coding began, and as accreditations expire, they are removed from database. The few that remain are due to extensions to accreditation.

Achievements by qualification level



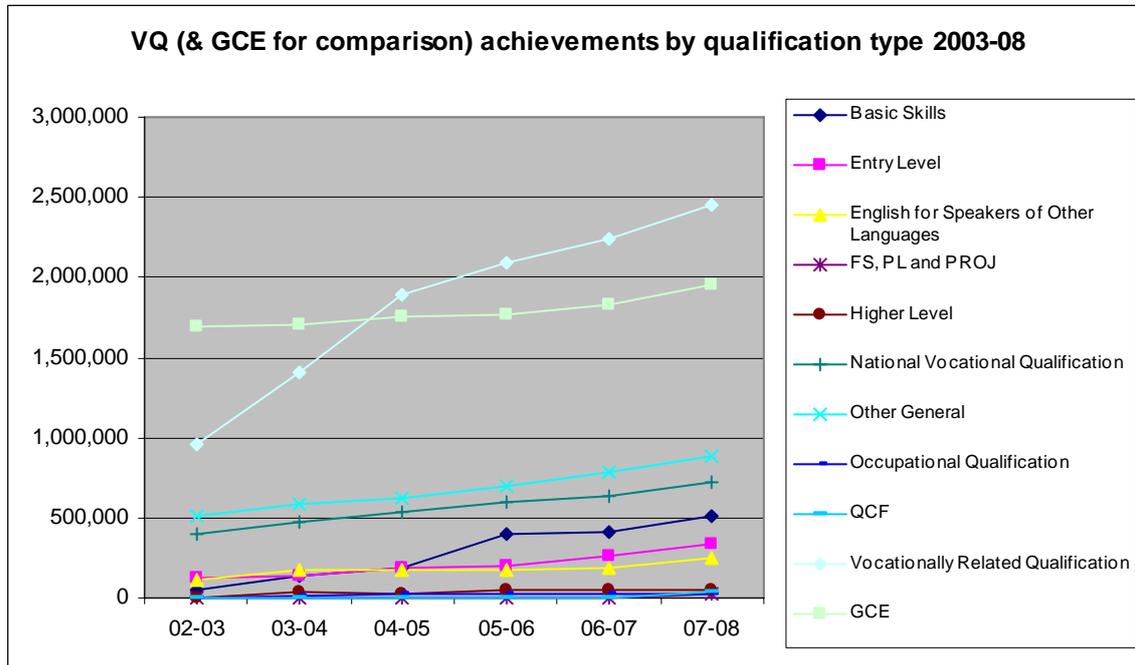
Source: Ofqual statistics database providing a snapshot for each year featured, extracted in December 2008.

In the graph above, levels 4, 5, 6, and 7 have been grouped together, although it is possible to break down the vocational market by numbers of achievements at each qualification level.

Level 1 and 2 qualifications continue to be the largest in terms of achievement. Level 2 qualifications show significant growth on last year, with almost 500,000 more achievements than last year. The government's target that *"more than 90 per cent of adults be qualified to at least Level 2 by 2020"* was set out in Lord Leitch's Review of Skills, published in December 2006.¹⁵

¹⁵ http://www.dius.gov.uk/speeches/denham_cbiskills_120907.html

Achievements by qualification type

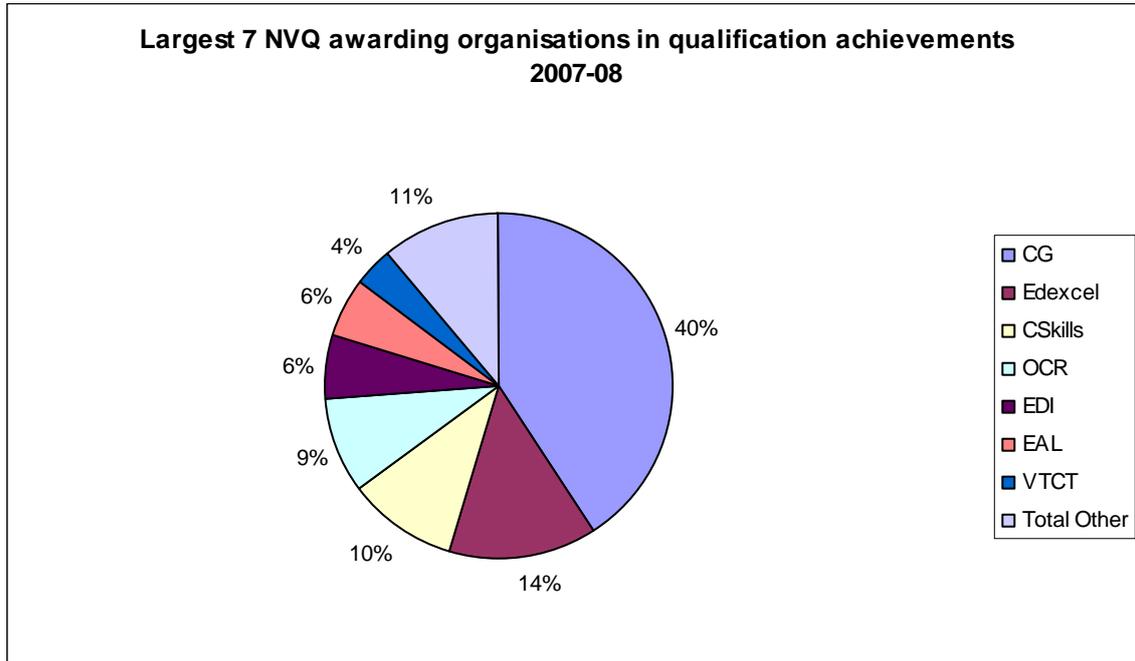


Source: Ofqual statistics database providing a snapshot for each year featured, extracted in December 2008. JCQ results data 2002–08.

The above graph shows the breakdown (in term of achievements) of the vocational market by qualification type, and includes GCEs for comparison purposes only.

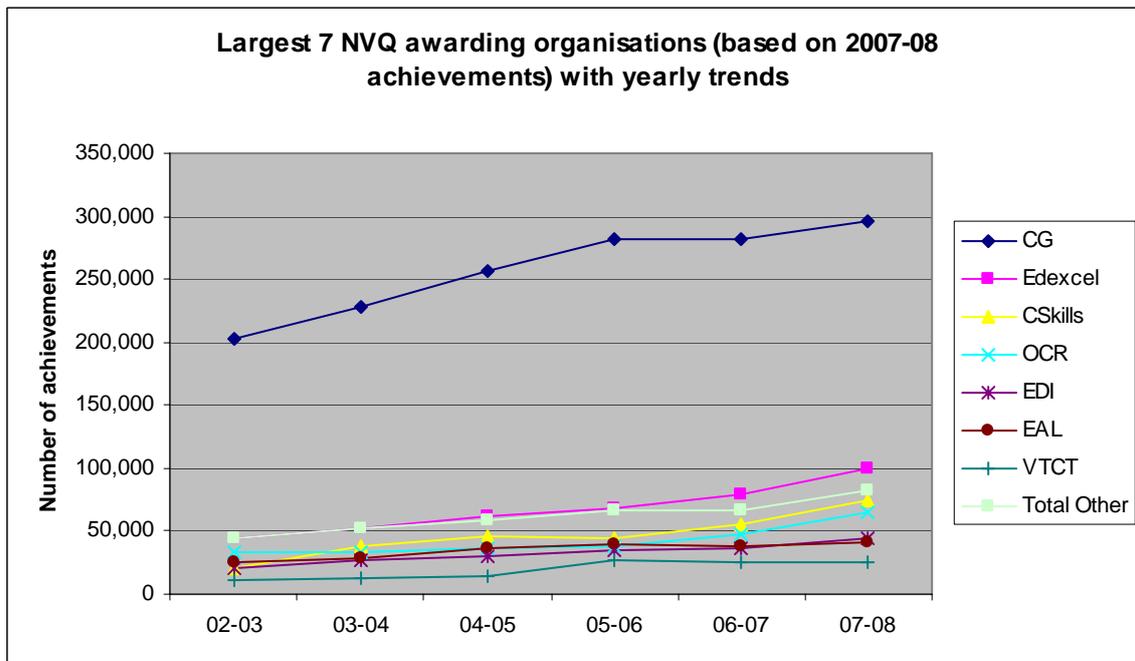
It reveals that achievements in all vocational qualification types, except occupational qualifications (OQ), have grown compared to last year. Vocationally related qualifications (VRQs) continue to have the largest number of achievements and drove the market growth last year. VRQs have increased in number by 150 per cent since 2002–03. NVQs and other general qualifications (OG – which mainly comprise qualifications that we cannot classify under standard categories, for example graded music and dance qualifications), also continue to show an upward trend against previous years.

Achievements in National Vocational Qualifications (NVQs)



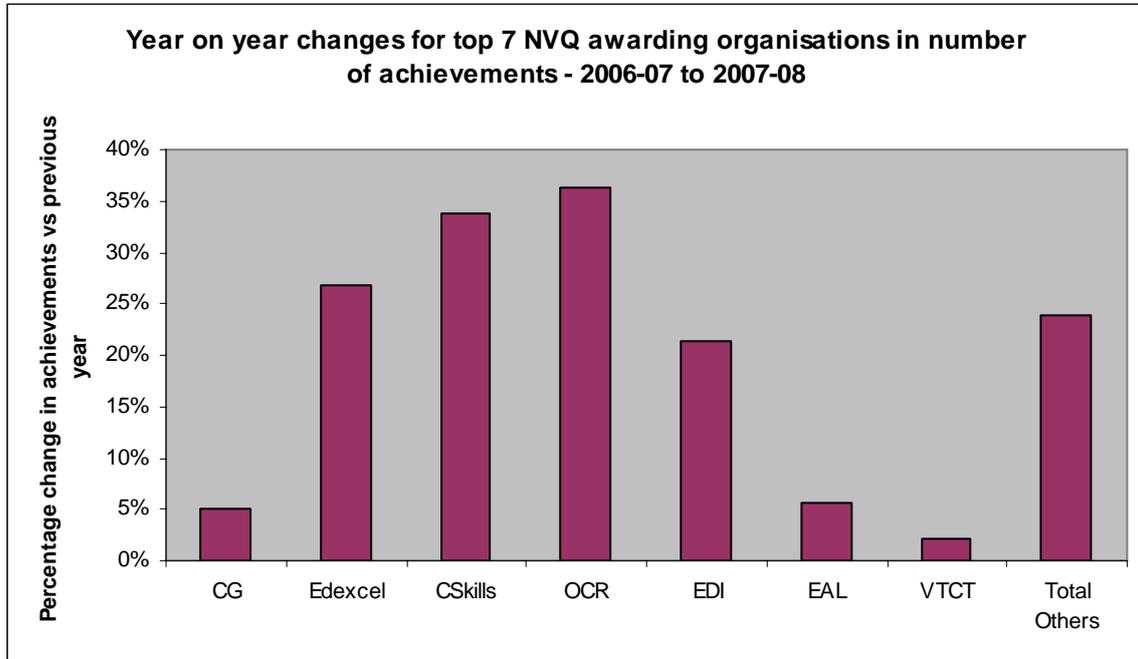
Source: Ofqual statistics database providing a snapshot for each year featured, extracted in December 2008.

Two awarding organisations make up over half of the market for NVQ achievements in 2007–08: The City & Guilds Group continues to have the greatest number, at 40 per cent, followed by Edexcel, at 14 per cent.



Source: Ofqual statistics database providing a snapshot for each year featured, extracted in Dec 2008.

The top seven awarding organisations (in NVQ achievements) have all shown an increase in achievements in 2008. The sum of the remaining NVQ awarding organisations has also shown an increase in achievements in 2007–08 compared to 2006–07.



Source: Ofqual statistics database providing a snapshot for each year featured, extracted in December 2008.

The graph above shows the increases in NVQ achievements on a percentage basis. OCR has had the greatest increase in achievements, rising 36 per cent from 2006–07 to 2007–08. The average increase across awarding organisations has been 16 per cent in NVQ achievements in 2007–08, compared to 2006–07.

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

Definitions of terms used in this report

Accredited qualification: an accredited qualification is one which 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 Bodies 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.

Glossary for awarding organisation name acronyms and abbreviations

Acronym	Awarding body name in full
1st4sport	1st4sport Qualifications
ABC	ABC Awards
ABRSM	Associated Board of the Royal Schools of Music
AQA	Assessment and Qualifications Alliance
ASDAN	Award Scheme Development Accreditation Network
ASET	ASET
BIIAB	BIIAB
BSC Awards	British Safety Council Awards
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
CG Group	The City & Guilds Group
CIEH	Chartered Institute of Environmental Health
CITB	CITB-Construction Skills
CSkills	Construction Skills
EAL	EMTA Awards Limited
Edexcel	Edexcel Limited
EDI	Education Development International plc
ILM	Institute of Leadership & Management
IQL	Institute of Qualified Lifeguards
ISTD	Imperial Society of Teachers of Dancing
NCFE	NCFE
NOCN	National Open College Network
NPTC	National Proficiency Tests Council
OCR	Oxford, Cambridge & RSA Examinations
RAD	Royal Academy of Dance
RIPH	Royal Institute of Public Health
RSPH	Royal Society for Public Health
Sports Leaders UK	Sports Leaders UK
TCL	Trinity College London
VTCT	VTCT
WJEC	WJEC CBAC Limited

Appendix A

Achievements for all vocational awarding organisations.

The data on vocational qualifications covers England, Wales and Northern Ireland.

Awarding organisation	Year	02–03	03–04	04–05	05–06	06–07	07–08*
	1st4sport Qualifications		15,132	32,509	40,109	41,737	48,640
ABC Awards		13,586	21,497	20,978	45,558	44,801	41,924
Active International Qualifications		-	0	2,672	3,965	9,498	8,744
Amateur Swimming Association		9,731	8,433	8,773	8,260	6,347	4,681
ASET		2	3,559	2,575	21,697	35,485	29,210
Assessment and Qualifications Alliance		65,387	69,903	97,831	74,932	97,156	109,479
Associated Board of the Royal Schools of Music		286,398	294,380	295,852	300,301	291,919	281,741
Association of Accounting Technicians		23,079	22,448	25,425	26,455	26,420	27,275
Association of Business Executives		-	-	-	-	0	13,208
Association of Chartered Certified Accountants		-	-	0	2,359	3,601	2,583
Association of Medical Secretaries, Practice Managers, Administrators & Receptionists		336	973	1,693	1,743	1,046	1,207
Award Scheme Development and Accreditation Network		645	2,267	4,101	8,015	15,592	24,944
Awarding Body for the Built Environment		19	4	105	248	3,374	3,455
British Ballet Organisation		4,495	4,931	4,674	5,433	4,638	2,276
British Computer Society, The		3	25,553	102,810	127,770	152,969	119,186
British Display Society		-	-	-	-	-	2,903
British Gas		3,789	3,758	4,005	3,815	4,275	4,291

Appendix A (continued) – Achievements for all vocational awarding organisations

Awarding organisation	Year					
	02–03	03–04	04–05	05–06	06–07	07–08*
British Horseracing Education and Standards Trust	525	648	701	855	1,048	3,257
British Horse Society, The	1,300	9,203	2,575	4,405	-	-
British Institute of Innkeeping	56,037	72,123	135,853	128,333	88,353	79,907
British Safety Council Awards	-	-	173	5,731	12,793	34,351
Cambridge ESOL Examinations	62,628	64,404	63,819	88,459	101,475	164,249
Central YMCA Qualifications	9,821	10,502	15,361	15,434	17,624	21,572
CFA Society of UK	252	1,519	1,548	1,385	1,375	2,196
Chartered Institute of Environmental Health	449,341	493,021	480,932	446,613	426,707	427,755
Chartered Institute of Housing	0	599	1,092	1,007	1,123	1,486
Chartered Institute of Marketing	563	1,673	2,779	3,236	3,179	2,986
Chartered Institute of Personnel and Development	4,814	6,602	7,770	7,709	9,324	5,620
Chartered Institute of Purchasing and Supply	581	1,674	2,370	4,621	3,727	2,914
Chartered Insurance Institute, The	7,522	9,082	11,388	11,976	11,498	9,520
Chartered Management Institute	4,461	7,971	9,122	10,181	12,856	13,956
Chartered Quality Institute	-	-	-	-	111	125
City & Guilds Group, The	327,229	617,971	773,902	831,573	830,299	947,488
Council for Advancement of Communication with Deaf People	88	16,968	20,764	20,008	13,856	11,098
Council for Awards in Children's Care and Education	22,563	36,394	40,865	53,131	56,468	63,602
Council for the Curriculum, Examinations and Assessment	6,394	6,446	7,416	15,270	12,807	19,521
Counselling and Psychotherapy Central Awarding Body	4,515	5,099	5,684	6,386	7,305	7,687
CSkills Awards -- Construction Skills	20,935	50,426	88,952	97,731	124,459	140,288

Appendix A (continued) – Achievements for all vocational awarding organisations

Awarding organisation	Year					
	02–03	03–04	04–05	05–06	06–07	07–08*
Edexcel	62,950	129,114	177,085	241,813	420,544	625,745
Education Development International plc	21,907	28,189	56,349	70,792	95,077	107,735
EMP Awarding Body Ltd	1,135	1,118	812	885	964	878
EMTA Awards Limited	24,716	28,365	40,994	46,134	46,402	50,228
Engineering Construction Industry Training Board	466	453	1,053	2,207	2,045	2,465
Engineering Training Council Awards Limited	1,468	1,224	1,673	1,584	849	945
English Speaking Board (International) Ltd	10,070	11,183	9,669	10,752	13,464	14,363
Equestrian Qualifications Limited	382	417	320	396	6,488	8,931
First Aid Qualifications	-	-	540	4,160	6,544	7,039
Food and Drink Qualifications	2,327	4,487	2,752	3,830	3,740	4,009
Glass Qualifications Authority	1,499	2,422	2,104	2,490	2,239	2,339
Graded Qualifications Alliance	7,768	8,907	9,480	12,537	11,289	14,955
Guildhall School of Music and Drama	26,359	30,347	29,521	25,443	6,322	0
Imperial Society of Teachers of Dancing	62,800	74,036	79,883	68,023	64,270	55,930
Institute of Administrative Management	-	-	-	0	1,424	2,714
Institute of Financial Services	16,850	10,060	9,800	8,803	11,851	11,286
Institute of Legal Executives		3,097	3,582	1,372	1,567	1,151
Institute of Motor Industry Awards Limited	3,060	5,856	10,172	15,729	22,843	24,660
Institute of Qualified Lifeguards	26,062	33,207	35,389	35,741	38,495	37,934
International Association of Book-Keepers	2,777	5,300	4,495	1,704	1,366	1,871
International Baccalaureate Organisation	-	-	-	-	5,171	17,815

Appendix A (continued) – Achievements for all vocational awarding organisations

Awarding organisation	Year					
	02–03	03–04	04–05	05–06	06–07	07–08*
International Curriculum & Assessment Agency (Examinations)	683	1,184	1,703	674	1,156	1,787
International Therapy Examination Council	5,674	8,647	10,571	9,723	8,102	6,814
ITC First Aid Ltd	-	-	-	-	1,650	3,768
Joint Examining Board	782	809	684	670	6	0
Lantra Awards	28	129	3,545	8,083	7,167	20,864
Learning Machine, The	-	-	-	-	-	4,063
London Academy of Music and Dramatic Art	47,231	50,025	33,417	35,204	40,028	42,737
Mountain Leader Training England	-	-	-	-	332	1,123
National Association of Estate Agents	34	453	737	1,095	2,856	-
National Exam Board in Occupational Safety and Health, The	3,472	6,088	8,016	11,869	9,419	11,280
National Federation of Property Professionals	-	-	-	-	-	1,845
National Open College Network	100	3,283	79,877	120,742	103,950	133,436
NCFE	7,195	36,703	70,303	108,690	124,514	122,313
Open College of the North West	289	389	7,127	20,036	20,404	17,528
Open University, The	177	166	1,207	1,687	756	1,566
Oxford, Cambridge and RSA Examinations	181,703	226,460	233,753	418,304	522,905	716,965
Process Awards Authority/Vocational Qualifications in Science, Engineering and Technology	917	1,020	1,199	1,614	1,666	1,878
Rock School Limited	4,779	6,248	8,905	12,532	14,131	12,779
Royal Academy of Dance	28,069	31,397	32,497	35,838	37,858	38,360
Royal College of Veterinary Surgeons, The	1,511	1,583	1,637	3,774	1,887	4,450
Royal Horticultural Society	-	0	0	324	3,571	1,682

Appendix A (continued) – Achievements for all vocational awarding organisations

Awarding organisation	Year					
	02–03	03–04	04–05	05–06	06–07	07–08*
Royal Institute of Public Health	33,200	33,477	34,010	31,178	16,612	15,014
Royal Society for Public Health	50,692	63,201	48,985	42,484	39,282	26,274
Securities & Investment Institute	-	3,955	39,191	34,279	29,030	28,858
Skills Assurance Services Limited	820	825	1,021	702	727	724
Sports Leaders UK	-	34,856	46,101	56,352	72,225	71,660
Swimming Teachers' Association	5,086	5,976	12,313	13,250	11,290	6,070
Thames Valley University	23,925	21,367	24,243	33,703	29,530	31,699
Trinity College London	33,997	34,609	69,658	92,019	99,216	107,372
University of the Arts, London	-	-	-	-	-	2,970
Vocational Training Charitable Trust	14,660	56,370	73,594	85,734	91,735	88,826
Waste Management Industry Training and Advisory Board	123	1,101	1,831	2,675	1,764	3,458
Wine and Spirit Education Trust	7,282	7,584	10,677	12,265	14,820	14,634
WJEC	37,137	36,197	37,107	38,132	38,716	39,830

For presentation purposes, we list the following recognised awarding organisations, which registered fewer than 1,000 qualification achievements in any given year since 2002 *:

Association of British Dispensing Opticians; AQA – City & Guilds; The Association of Sports Qualifications; Automotive Management and Development; CABWI Awarding Body; Chartered Institute of Building; Chartered Institute of Logistics and Transport in the UK; Chartered Institute of Public Relations; Fibreboard Awarding Body; The Gemmological Association; Hotel, Catering and International Management Association; Institute of Animal Technology; Institute of Credit Management; Institute of Hospitality; Institute of Materials; Institute of Quality Assurance; Institute

of Revenues Rating and Valuation; Institute of Sales and Marketing Management; IoL Educational Trust; Market Research Society; National Examining Board in Supervisory Management; NCC Education Services Ltd; NCTJ Training; Process Awards Authority; Packaging Industry Awarding Body Company; The Pensions Management Institute; Professional Association of Diving Instructors; Qualifications for Industry Ltd; Qualifications Network; Scottish Qualifications Authority; Worshipful Company of Farriers; and Worshipful Company of Spectacle Makers.

Full data listings for these are available from the Ofqual statistics database on request.

** 2007–08 data is provisional due to phasing of data collection.*

Appendix B

Rationalisation of awarding organisations

There has been some rationalisation of awarding organisations recently through mergers. The following market activity should be noted:

- The Association of Medical Secretaries, Practice Managers, Administrators and Receptionists (AMSPAR) has developed a relationship with The City & Guilds Group to offer a number of qualifications jointly.
- ASET's qualifications have now been subsumed into the EDI brand.
- The Royal Institute of Public Health (RIPH) and the Royal Society of Health (RSH) have merged and operate under the name of the Royal Society for Public Health (RSPH).
- The Institute of Operations Management (IOM) now operates as an institute within the Chartered Institute of Logistics and Transport in the UK (CILT(UK)).
- PAAVQ-SET took over the Skills Assurance Services Limited (SASL), whose qualifications have been incorporated into PAAVQ-SET's existing portfolio.

The regulatory authorities wish to make their publications widely accessible. Please contact us if you have any specific accessibility requirements.

First published in 2009.

© Crown copyright 2009

© Council for the Curriculum Examinations and Assessment 2009

© Qualifications and Curriculum Authority 2009

Reproduction, storage or translation, in any form or by any means, of this publication is prohibited without prior written permission of the publisher, unless within the terms of the Copyright Licensing Agency. Excerpts may be reproduced for the purpose of research, private study, criticism or review, or by educational institutions solely for education purposes, without permission, provided full acknowledgement is given.

Printed in Great Britain.

The Qualifications and Curriculum Authority is an exempt charity under Schedule 2 of the Charities Act 1993.

Qualifications and Curriculum Authority
83 Piccadilly
London
W1J 8QA
www.qca.org.uk