



# Annual qualifications market report

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April 2009

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## 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 qualifications<sup>1</sup> 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.

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<sup>1</sup> 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 qualifications<sup>2</sup>; 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

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<sup>2</sup> 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 purposes<sup>3</sup>.

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 regulators<sup>4</sup>.

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<sup>3</sup> 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.

<sup>4</sup> 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](http://www.ofqual.gov.uk/files/pdf_05_2239full_report.pdf)

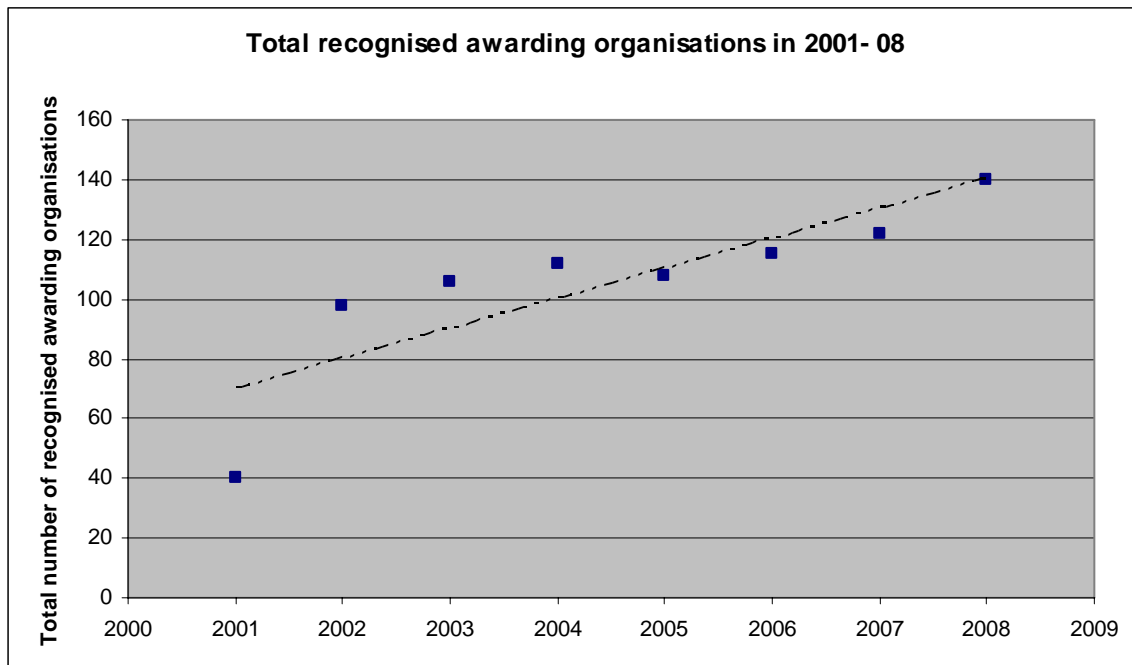
## Supply in the qualifications market

### 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**

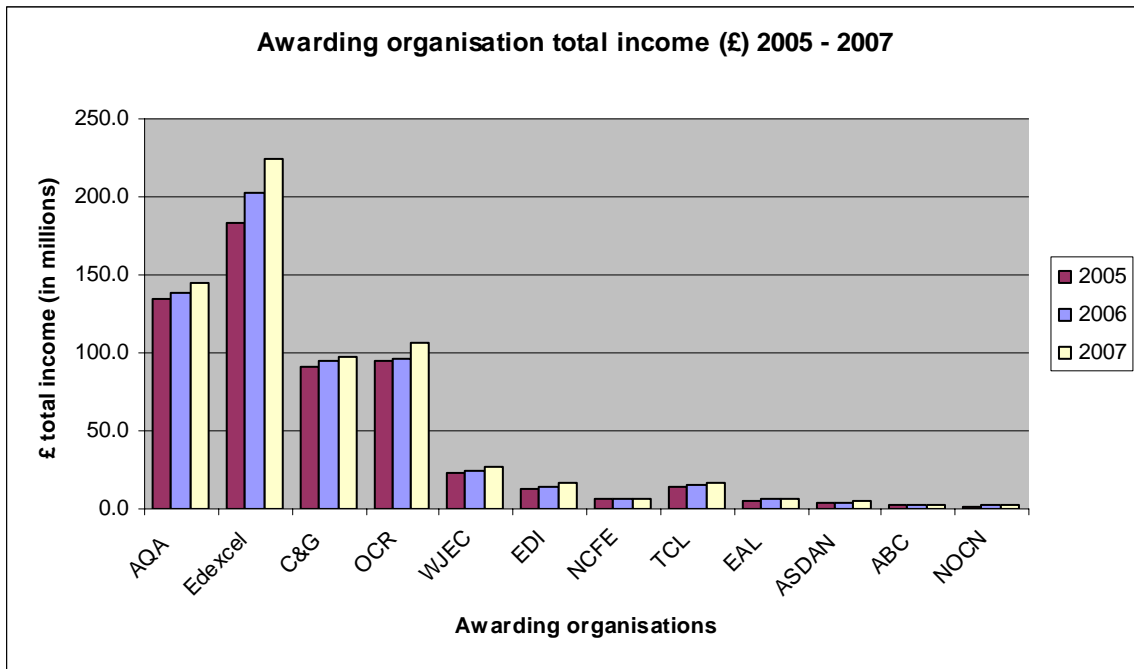
Total income<sup>5</sup> is not a pure measure of turnover from activity relating to qualifications, as it will include interest payments, investment yield and any business undertaken that does not limit itself to providing qualifications. Also, differing percentages of the total income could be gained 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.

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<sup>5</sup> 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.

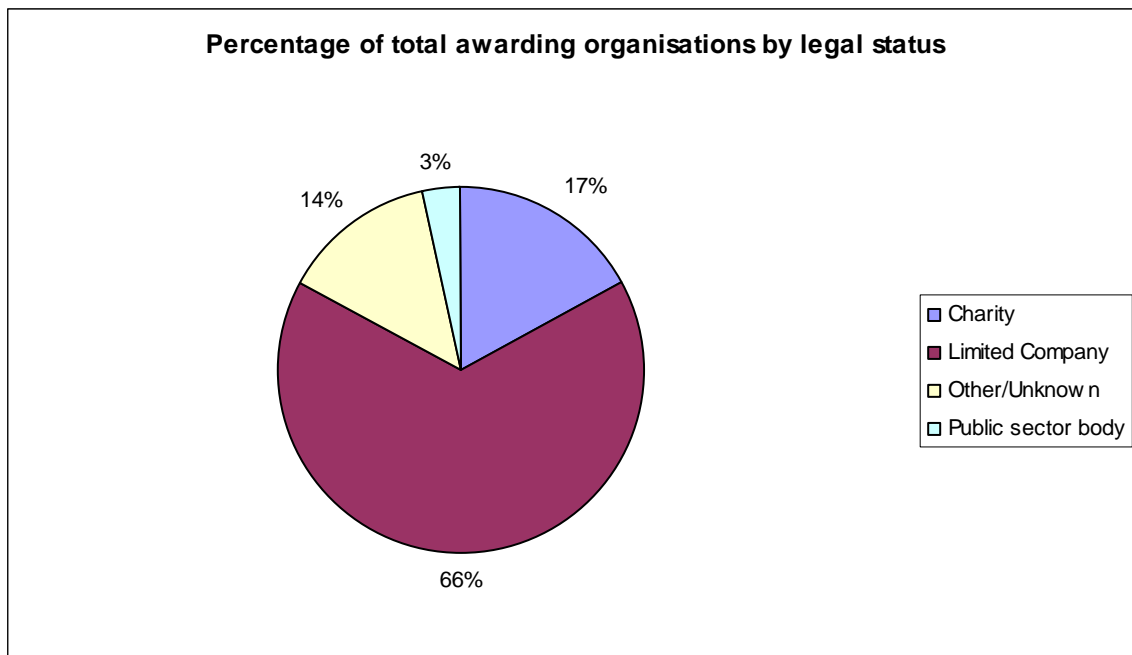
| Awarding organisation name                            | Total income (in millions £) |       |                    |
|---|------------------------------|-------|--------------------|
|   | 2005                         | 2006  | 2007               |
| ABC: ABC Awards                                       | 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 <sup>6</sup> |
| 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.

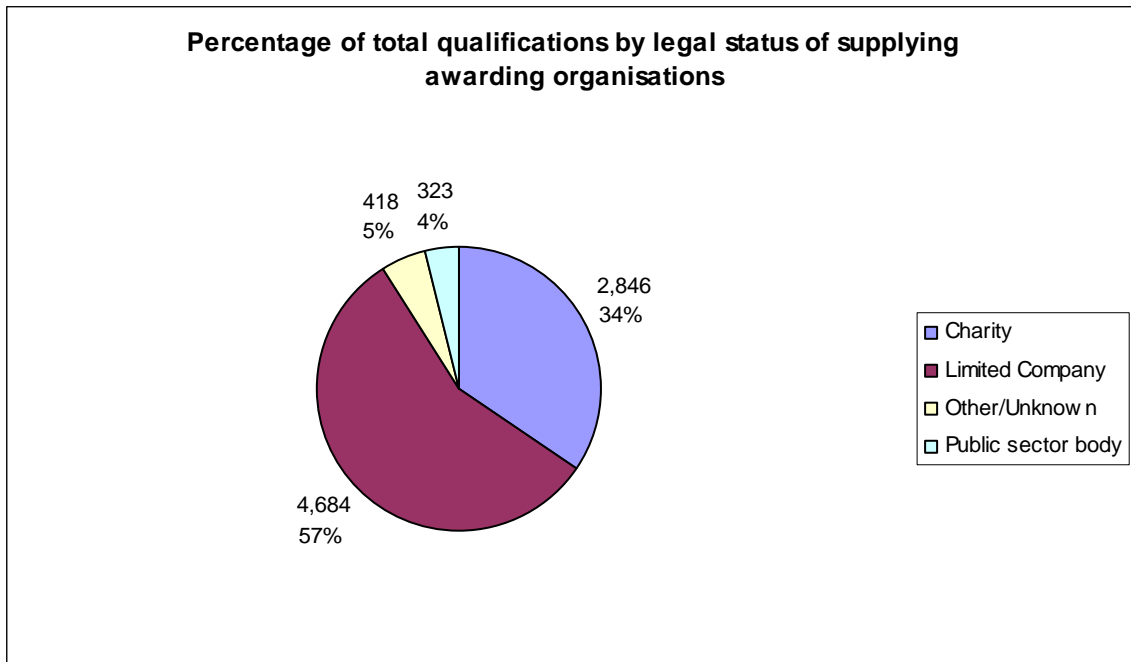
<sup>6</sup> OCR data for 2007 reports on 10 months, rather than the standard 12-month reporting period.

## 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.

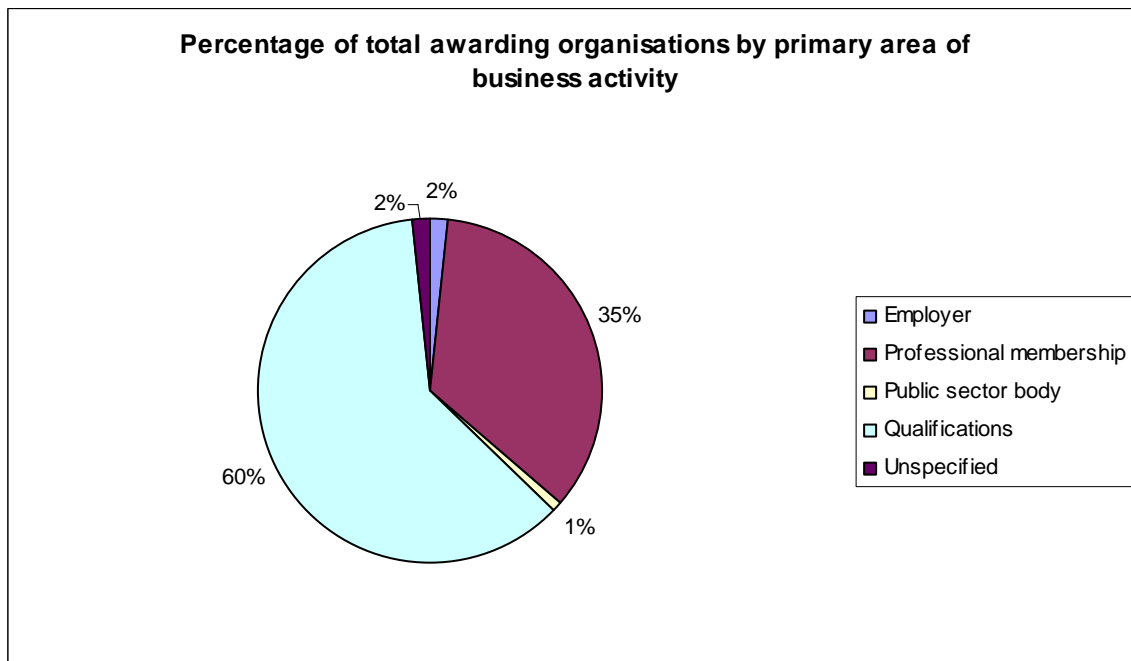


If, as below, the number of accredited qualifications is noted according to the legal status of the awarding organisations, the picture alters, particularly with regard to the charity sector. This is in part due to the size and contribution of The City & Guilds Group and AQA, which account for a sizeable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



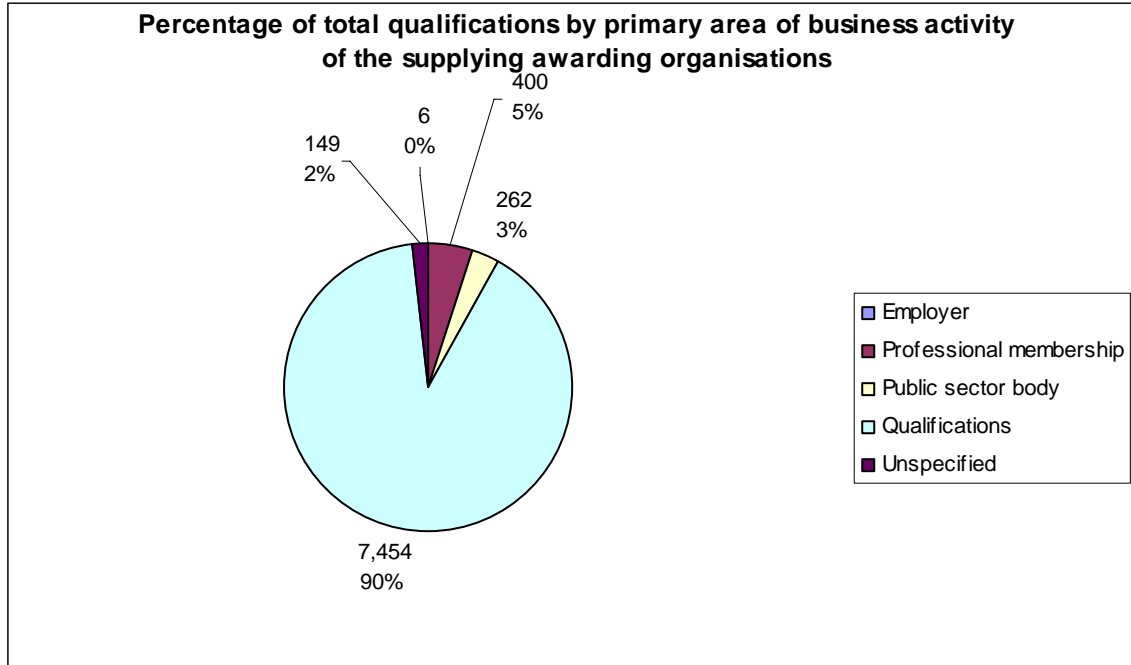
**Awarding organisations' primary area of business activity**

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

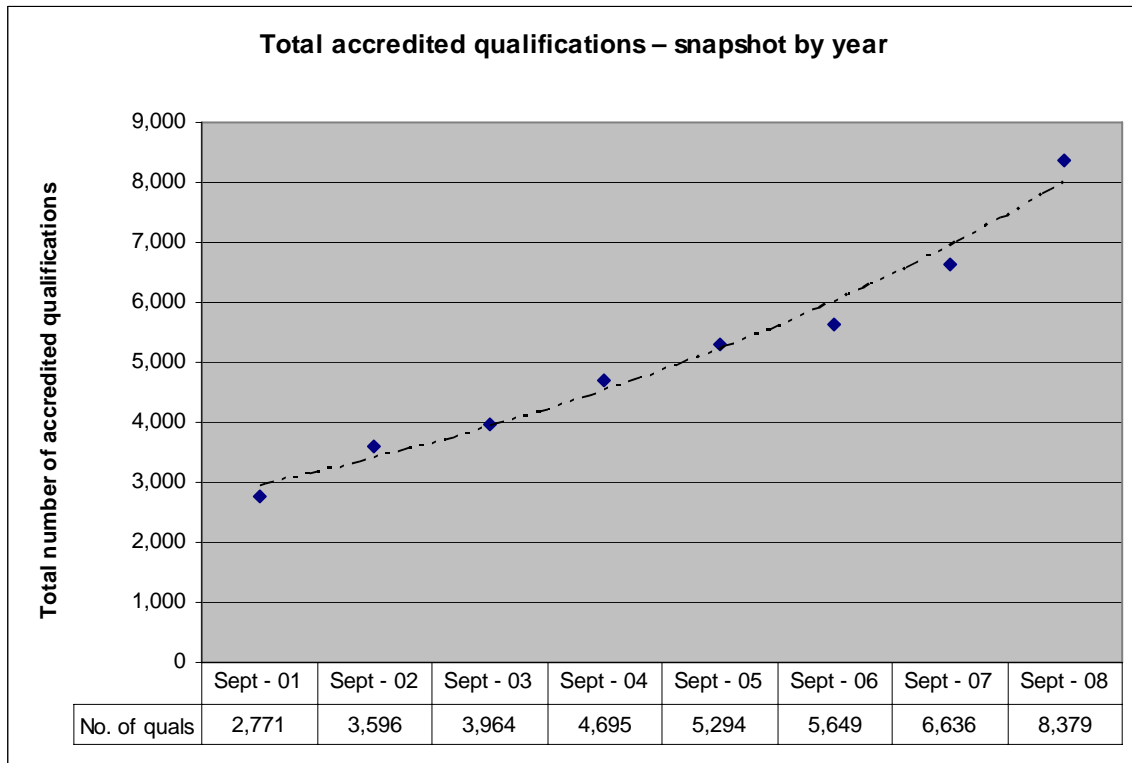
"added value" service to their members. A small percentage (2 per cent) of awarding organisations can be classed as employers, including McDonalds and Flybe.



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.

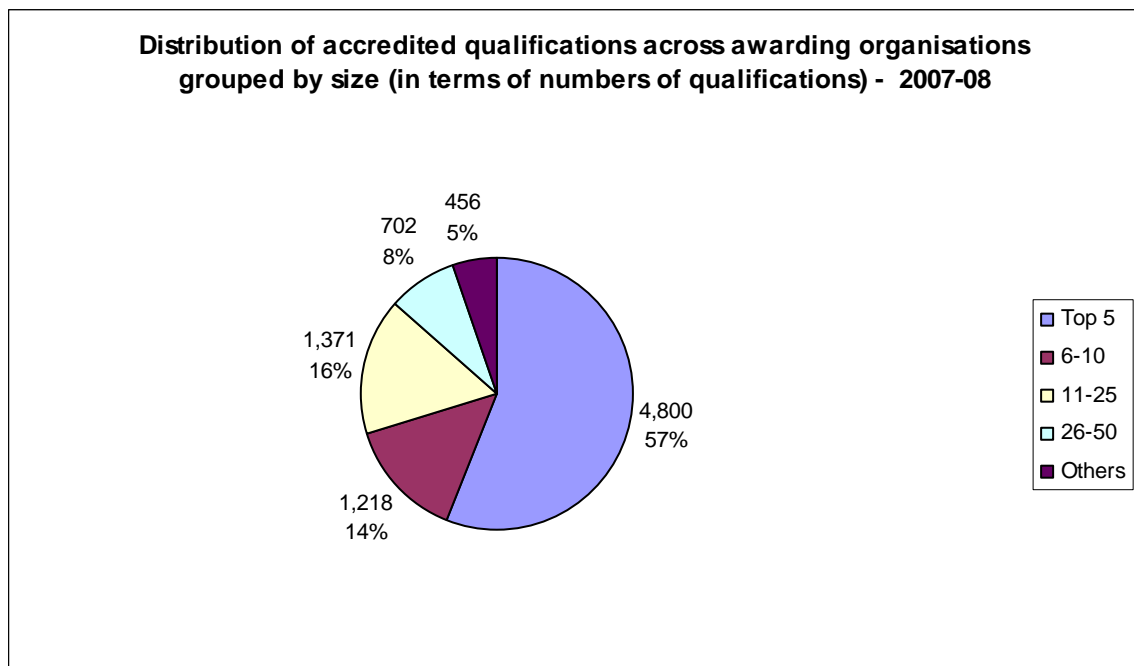
The significant 26 per cent increase in the number of accredited qualifications between 2007 and 2008 can be attributed to:

- 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 specifications<sup>7</sup> 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).

<sup>7</sup> 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

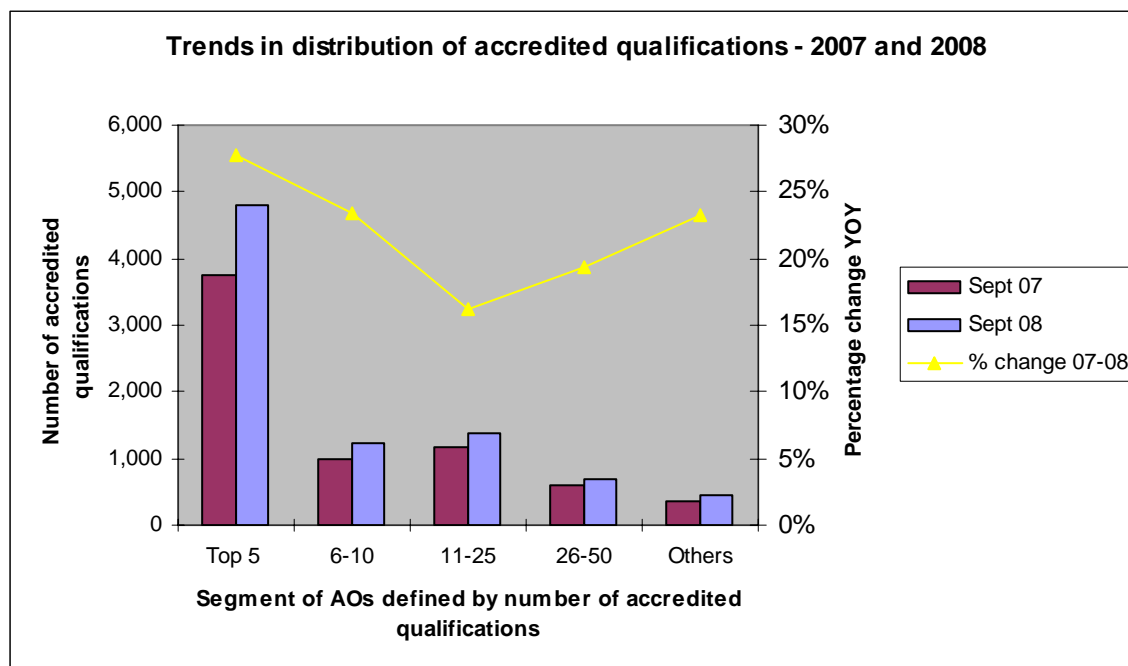
By ranking the awarding organisations by the number of accredited qualifications they have, it is clear that a small number of large awarding organisations continue to offer the majority of qualifications. The larger five (AQA, the City & Guilds Group, Edexcel, OCR and WJEC) continue to dominate the 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.



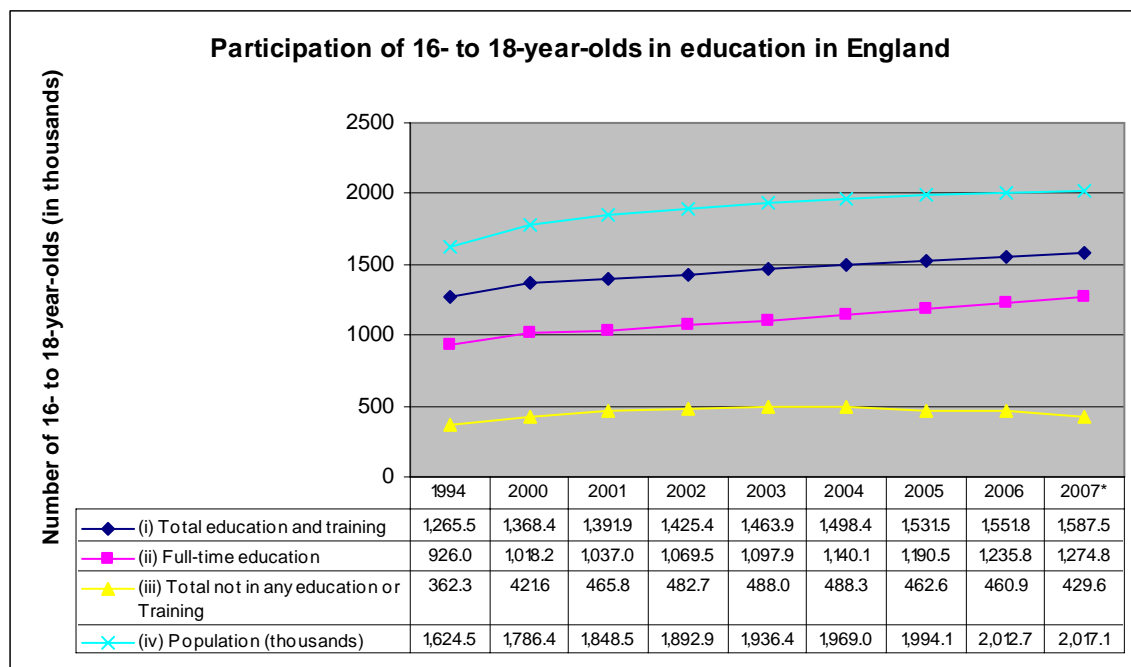
| Qualification Type                              | Sept 01      | Sept 02      | Sept 03      | Sept 04      | Sept 05      | Sept 06      | Sept 07      | Sept 08      |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| Advanced 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        |
| <b>Total</b>                                    | <b>2,771</b> | <b>3,592</b> | <b>3,964</b> | <b>4,695</b> | <b>5,294</b> | <b>5,649</b> | <b>6,636</b> | <b>8,379</b> |

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](http://www.dcsf.gov.uk)). Extracted in March 2009 when the figures stated for 2007 were still provisional.

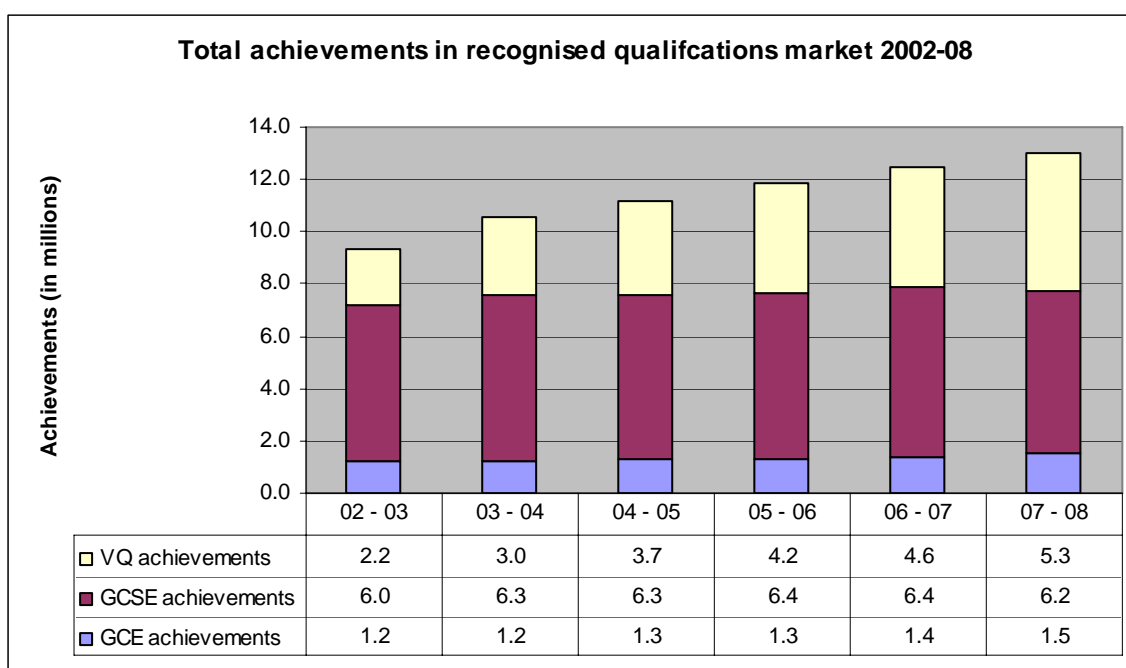
The proportion of 16- and 17-year-olds participating in education and training has increased steadily to reach 91 per cent for 16-year-olds and 82 per cent for 17-year-olds in 2007.

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 organisations<sup>8</sup>. 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.

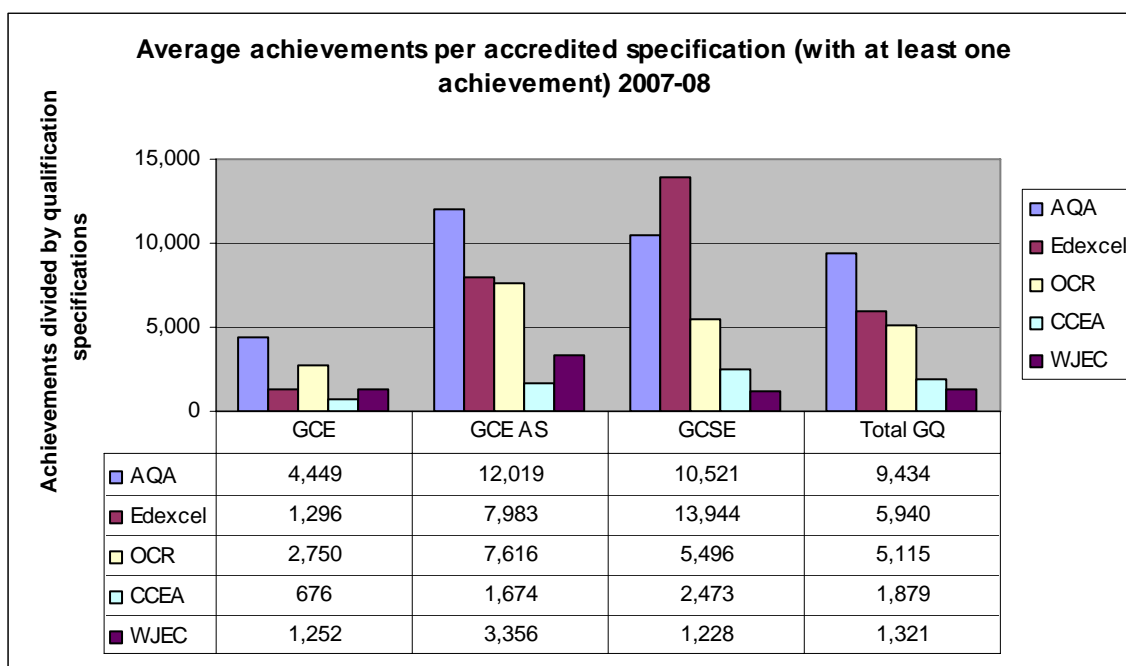
## General qualifications market

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

<sup>8</sup> 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.



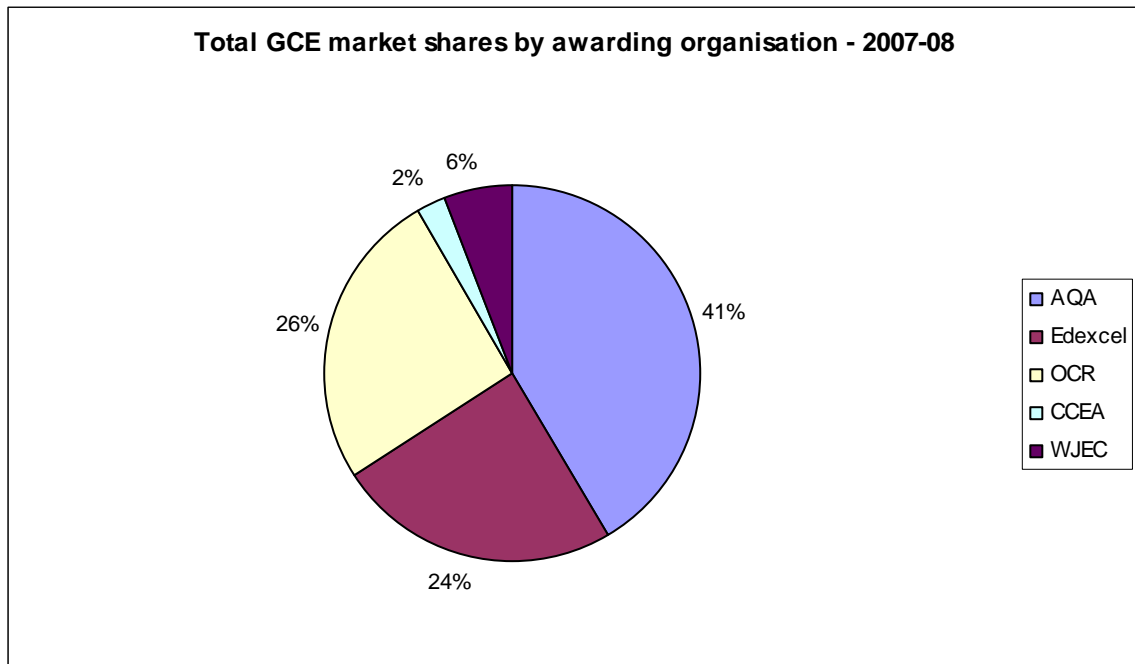
Source: JCQ summer results data 2007-08 (provisional) and NDAQ.

## 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.

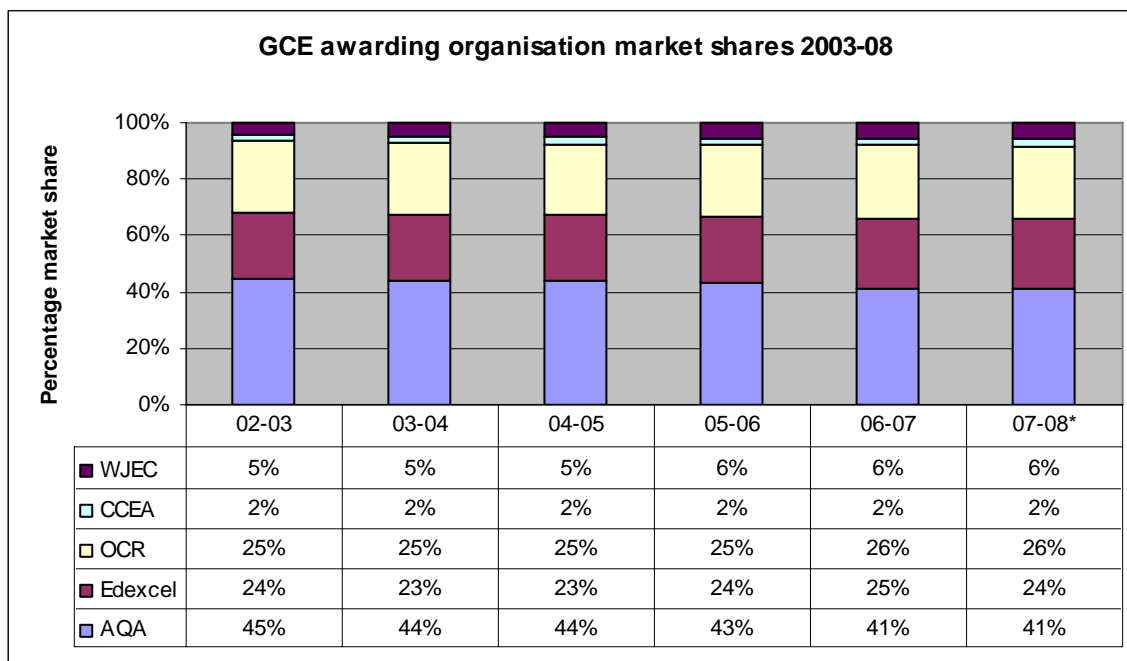
\*2007-08 data is provisional due to phasing of data collection.



*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.

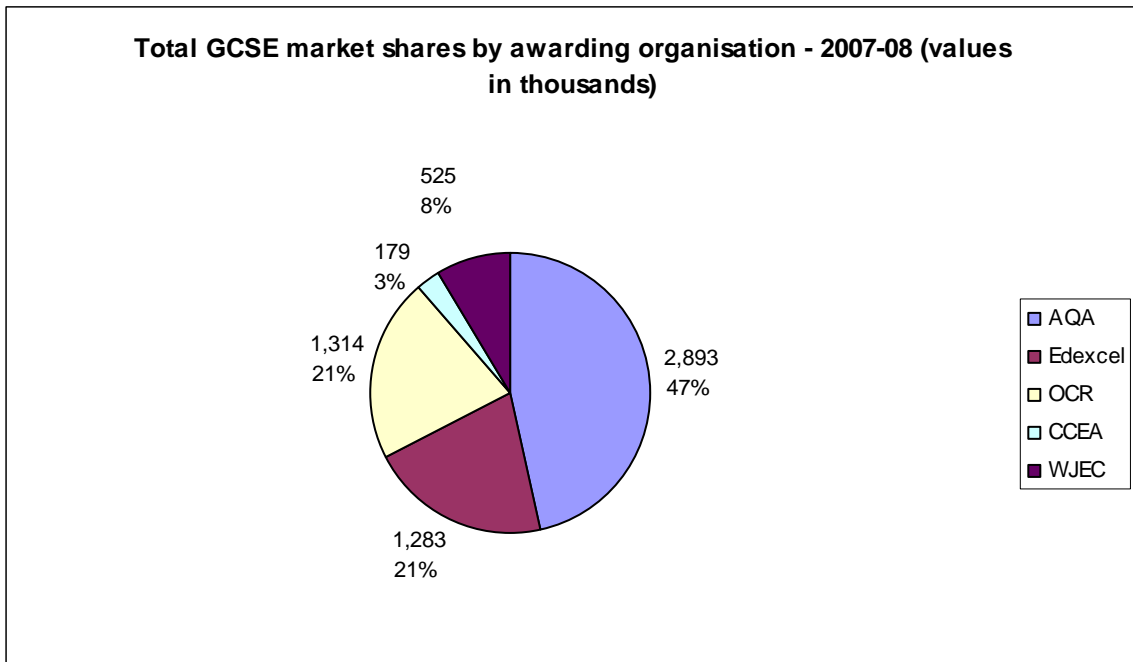
In 2007–08, there was a decrease of nearly 240,000 achievements, compared with 2006–07. JCQ's August 2008 news release for GCSE results<sup>9</sup>, that a smaller cohort of 16-year-olds (reduced by approximately 6,000), contributed to this decrease.

| 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.

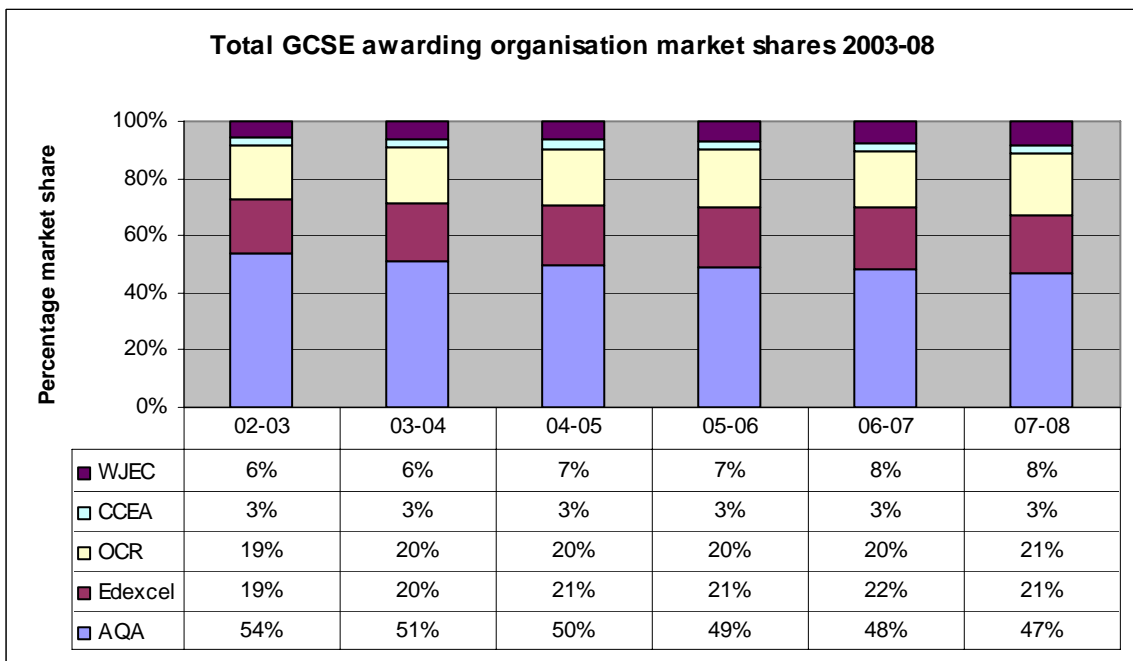
<sup>9</sup> JCQ New Release on GCSE Results – 21 August 2008, see following link:

[http://www.jcq.org.uk/attachments/published/1021/GCSE\\_per\\_cent20News\\_per\\_cent20release.pdf](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.*

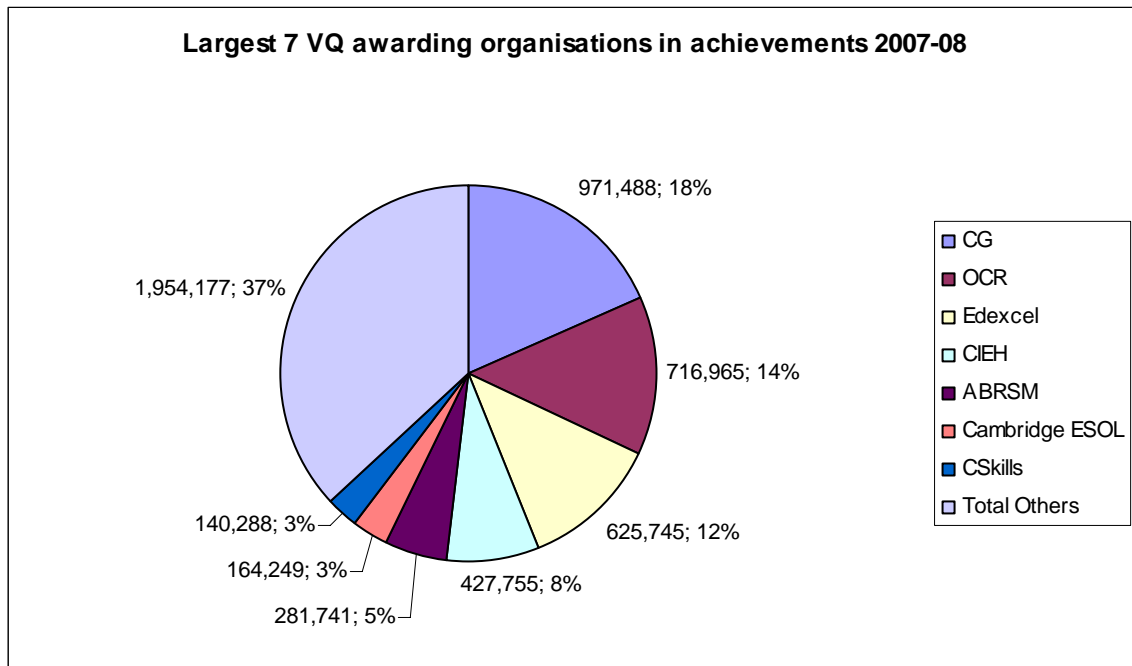
There has been a 15 per cent increase in VQ achievements in the last year, equivalent to an increase of nearly 700,000. The following sections of the report highlight what has driven this increase.

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.



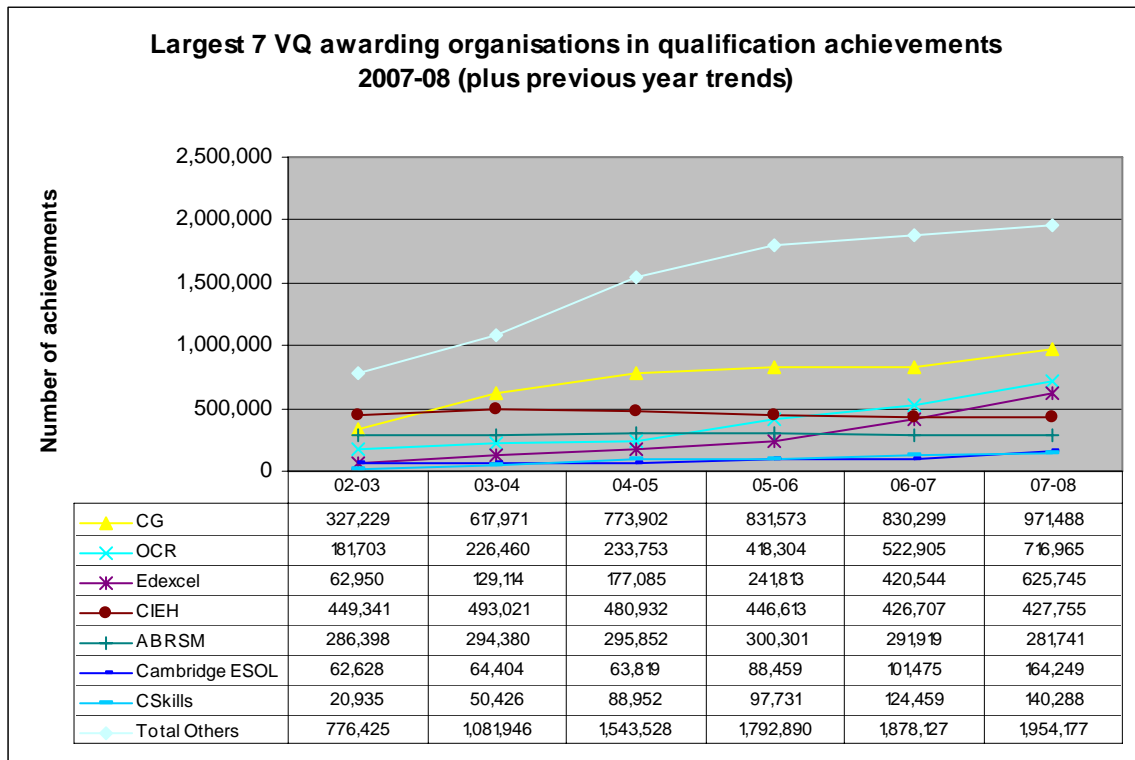
## Vocational achievements by awarding organisations



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

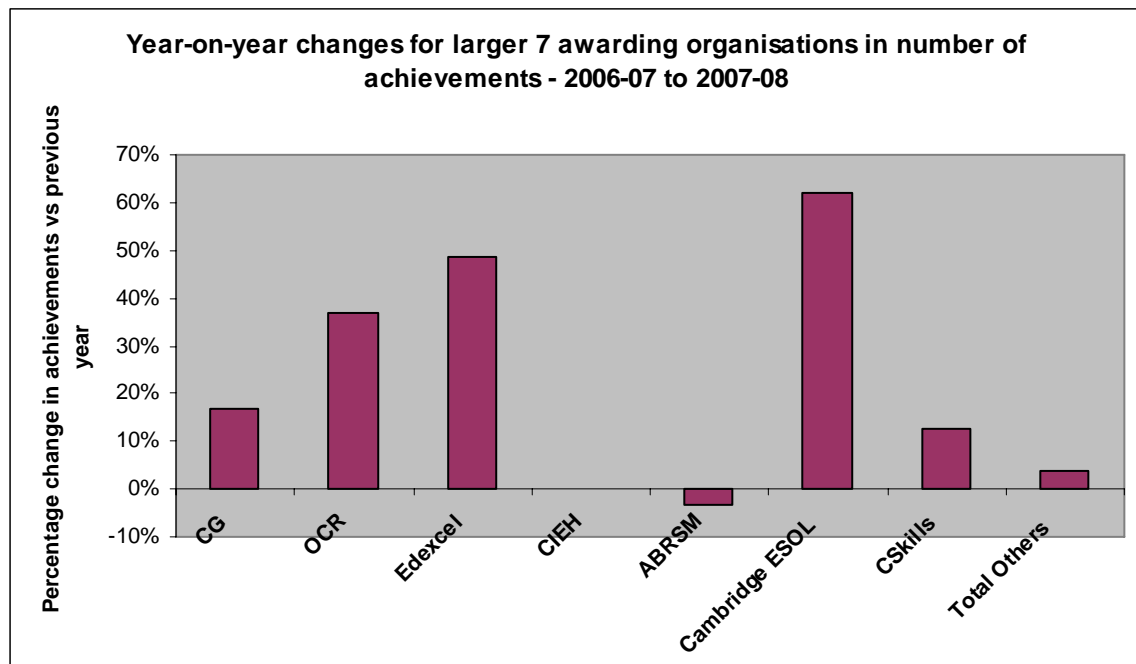
We focus on the seven largest awarding organisations, based on the number of achievements. The graph above shows that The City & Guilds Group (CG)<sup>10</sup> continues to hold the largest market share in the vocational sector with 18 per cent. OCR (14 per cent) and Edexcel (12 per cent) are the next 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.

<sup>10</sup> 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.



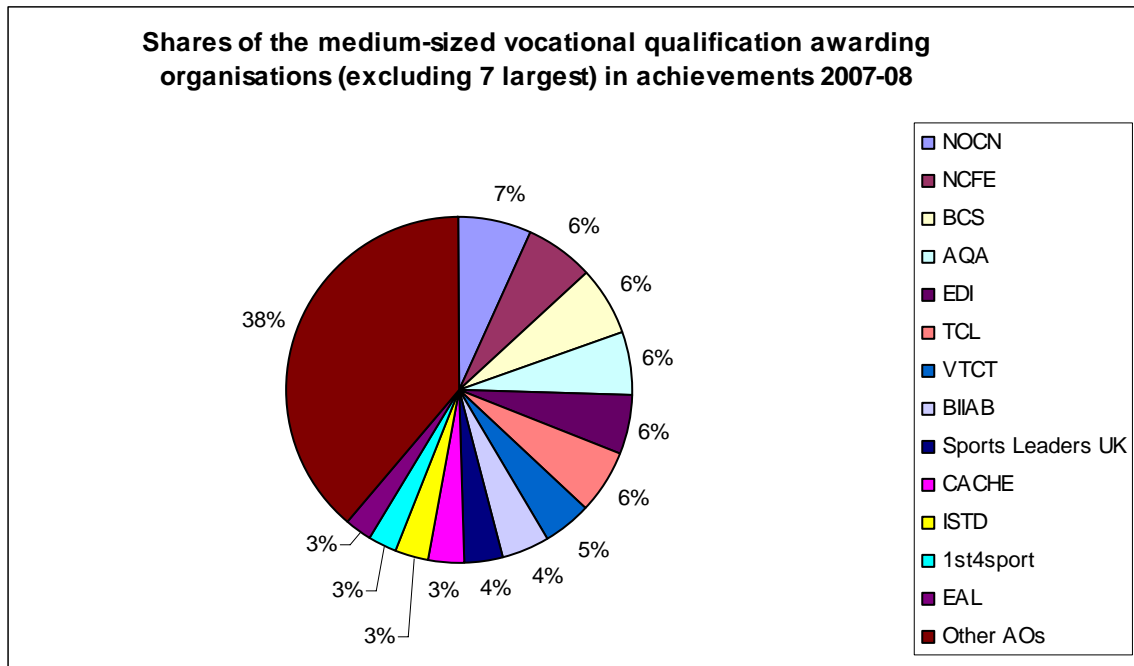
Source: Ofqual statistics database providing a snapshot for each year featured, extracted in January 2009.

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 cent<sup>11</sup>.

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.

<sup>11</sup> This is based on provisional data which is currently being verified by Cambridge ESOL.

## Market share and variances in share of the medium-sized<sup>12</sup> vocational awarding organisations



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

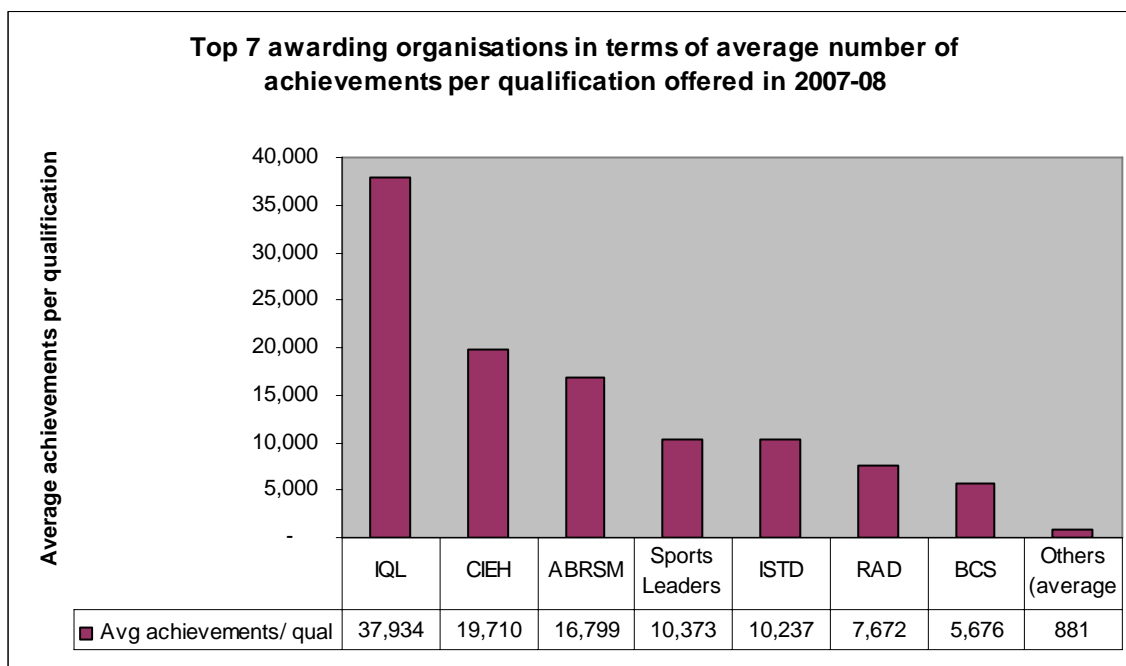
The above graph shows the significant contribution that the medium-sized awarding organisations make to the market, as measured by numbers of achievements awarded. We have excluded the larger seven awarding organisations (see previous graphs) which make up 63 per cent of the vocational market, to show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

<sup>12</sup> 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.

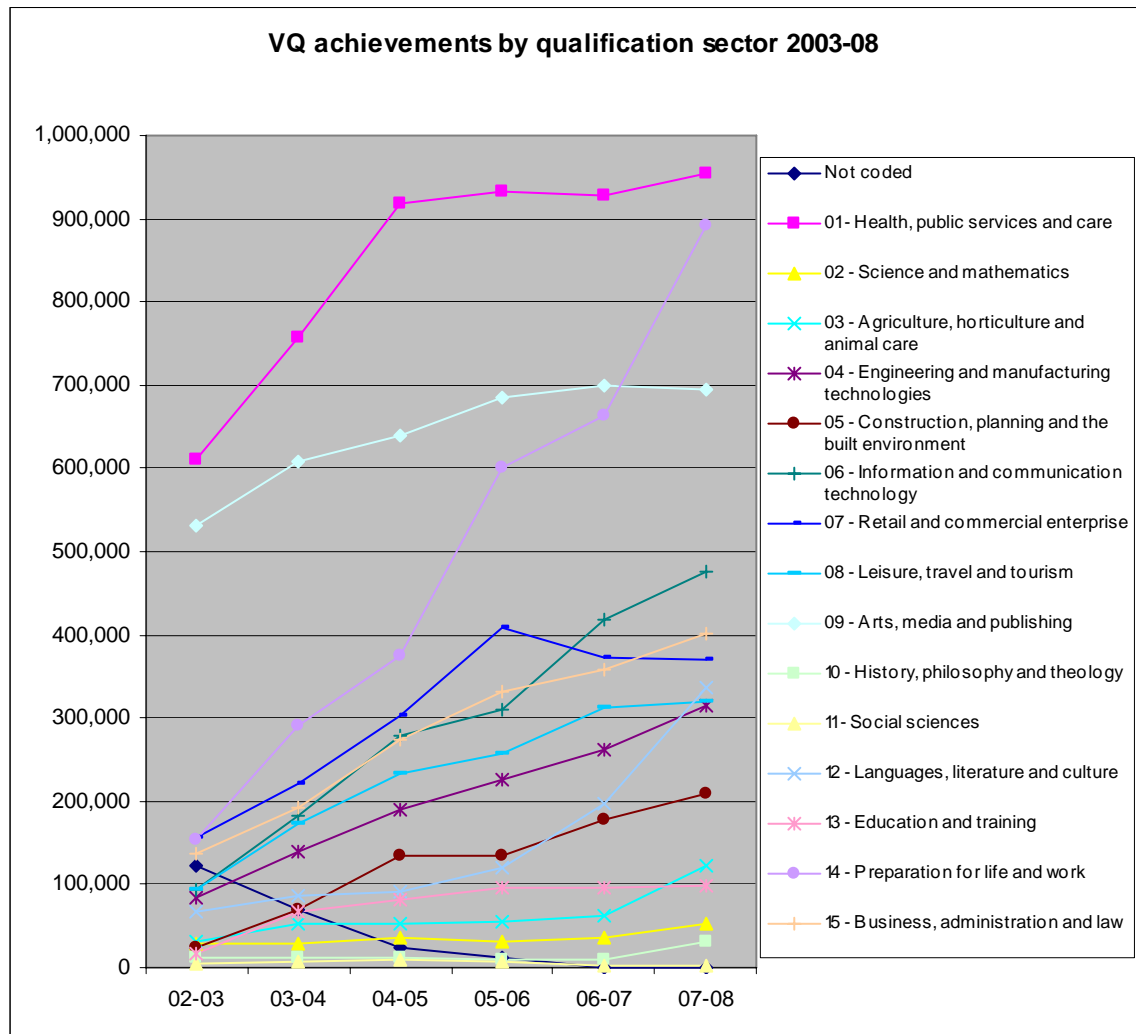
To provide context we could compare these numbers with the general qualifications sector, which has an average of 4,948 achievements per qualification; AQA has the highest performance in GCSEs, with an average of 12,019 achievements per qualification specification.



Source: Ofqual statistics database and NDAQ, providing snapshots for 2007–08, extracted in January 2009.<sup>13</sup>

<sup>13</sup> 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.

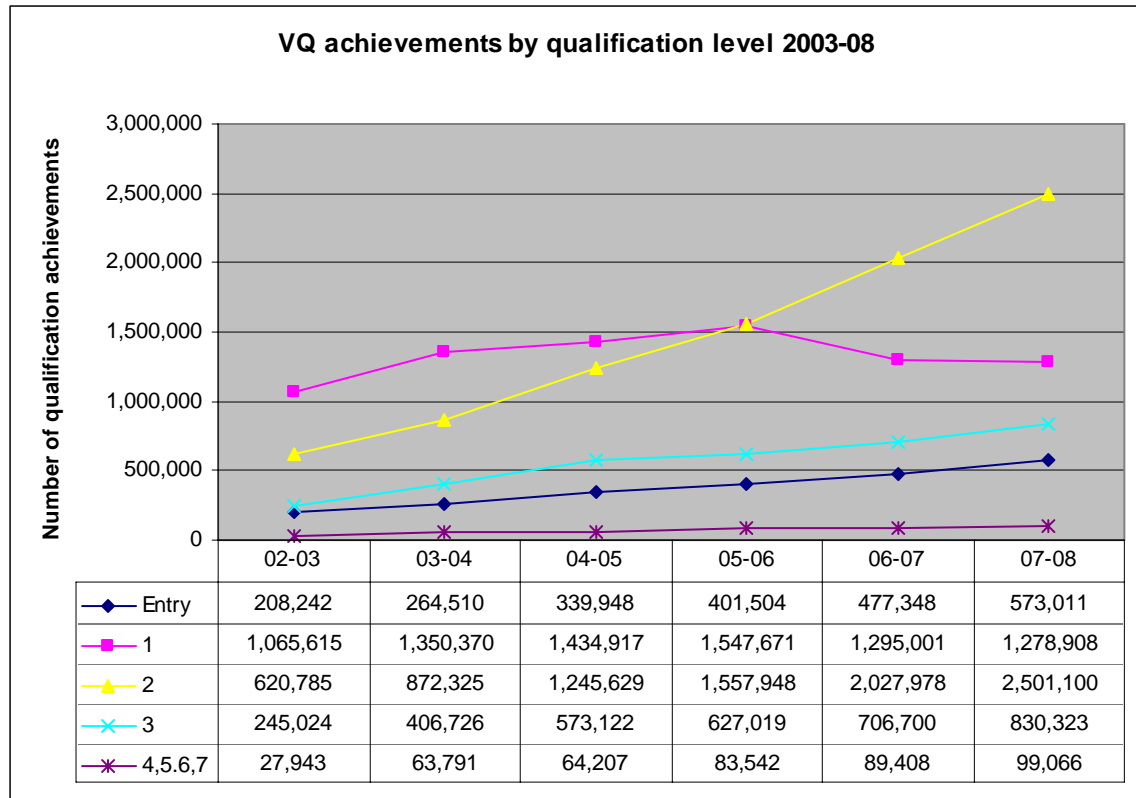
Further figures on the size of achievements (in thousands) and the achievement trends of the different vocational sectors are shown in the chart below.

| Sector size by number of achievements/ year<br>(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 <sup>14</sup>                                       | 122.6        | 68.8         | 24.9         | 12.2         | 0.2          | 0.004        |
| <b>Total</b>  | <b>2,168</b> | <b>2,958</b> | <b>3,658</b> | <b>4,218</b> | <b>4,596</b> | <b>5,282</b> |

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

<sup>14</sup> 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.

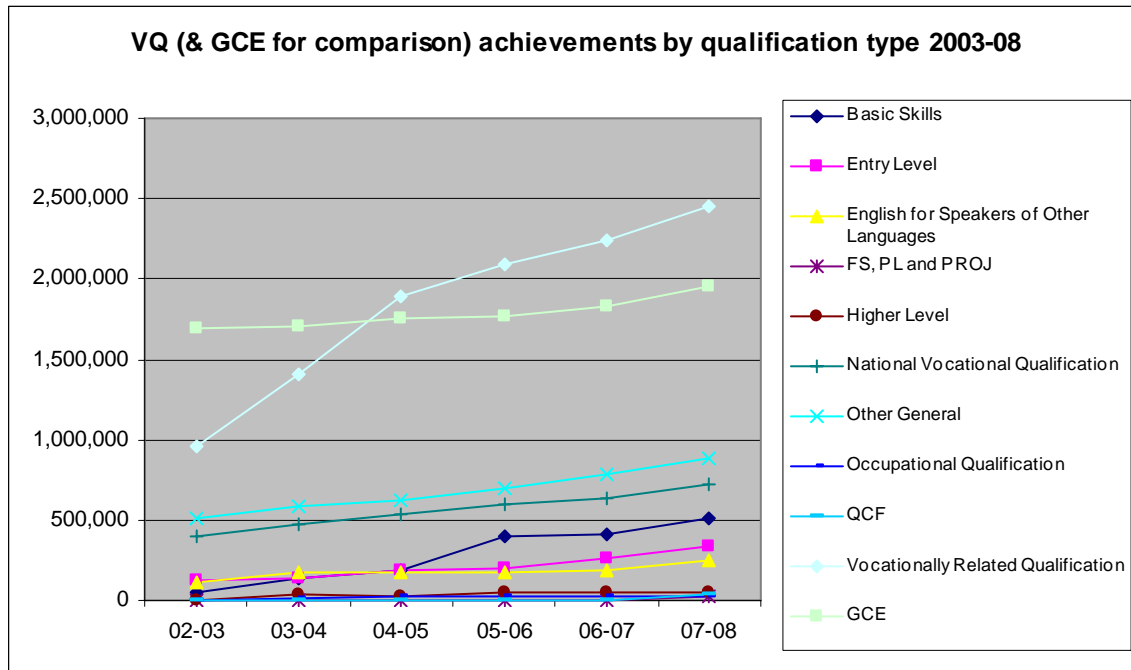
In the graph above, levels 4, 5, 6, and 7 have been grouped together, although it is possible to break down the vocational market by numbers of achievements at each qualification level.

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.<sup>15</sup>

<sup>15</sup> [http://www.dius.gov.uk/speeches/denham\\_cbiskills\\_120907.html](http://www.dius.gov.uk/speeches/denham_cbiskills_120907.html)



## Achievements by qualification type

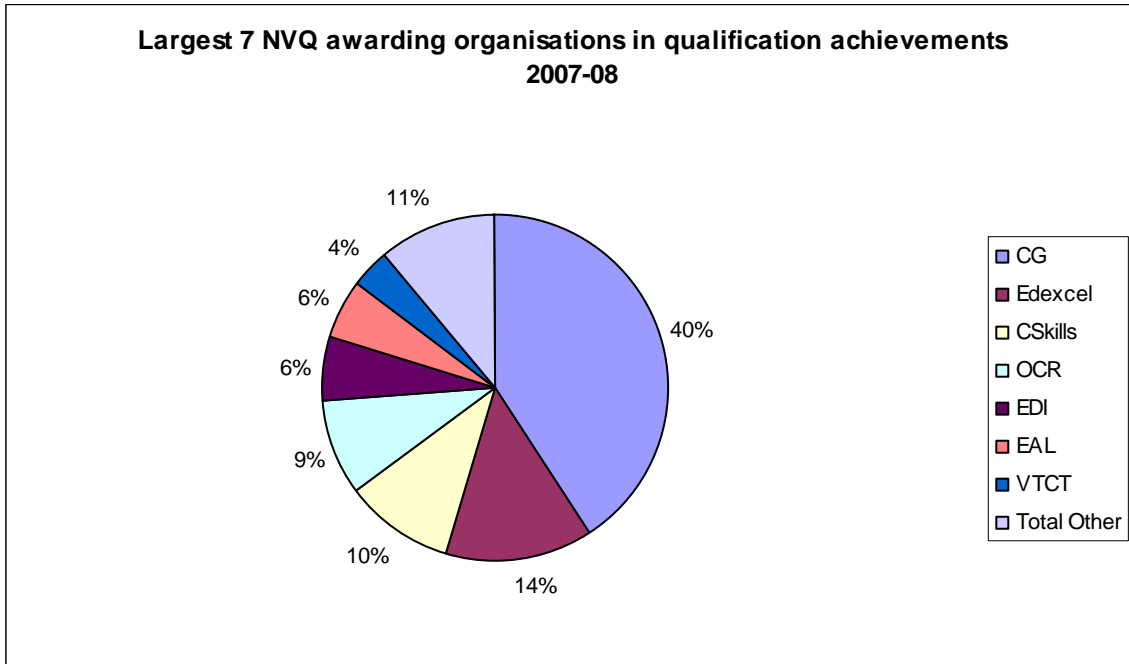


Source: Ofqual statistics database providing a snapshot for each year featured, extracted in December 2008. JCQ results data 2002–08.

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

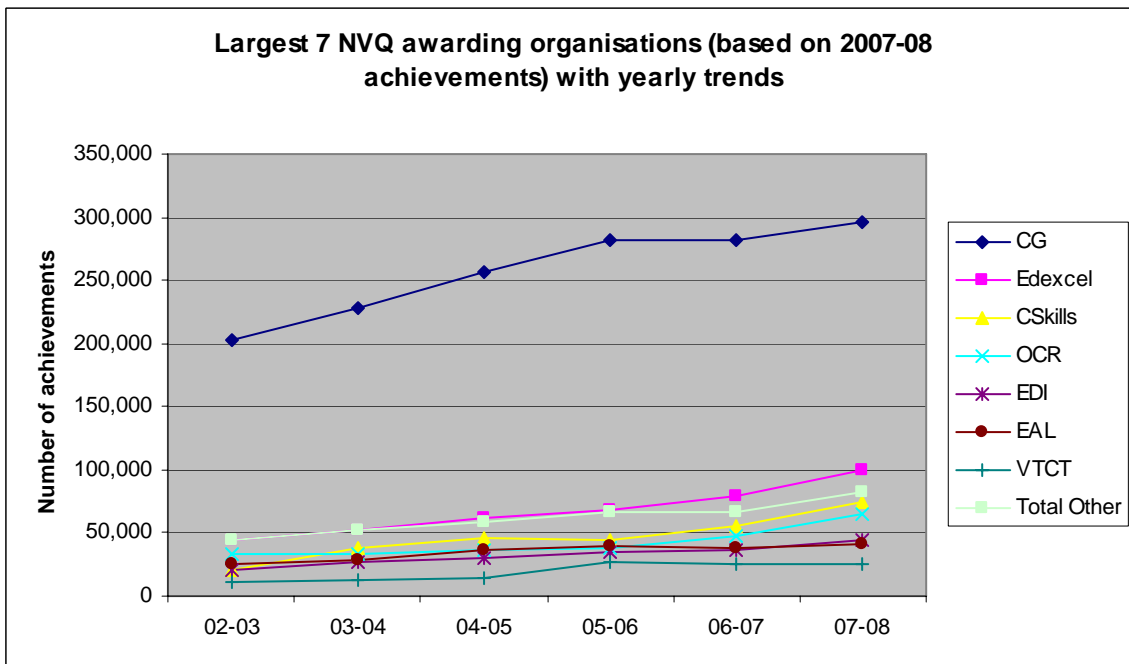
It reveals that achievements in all vocational qualification types, except occupational qualifications (OQ), have grown compared to last year. Vocationally related qualifications (VRQs) continue to have the largest number of achievements and drove the market growth last year. VRQs have increased in number 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)



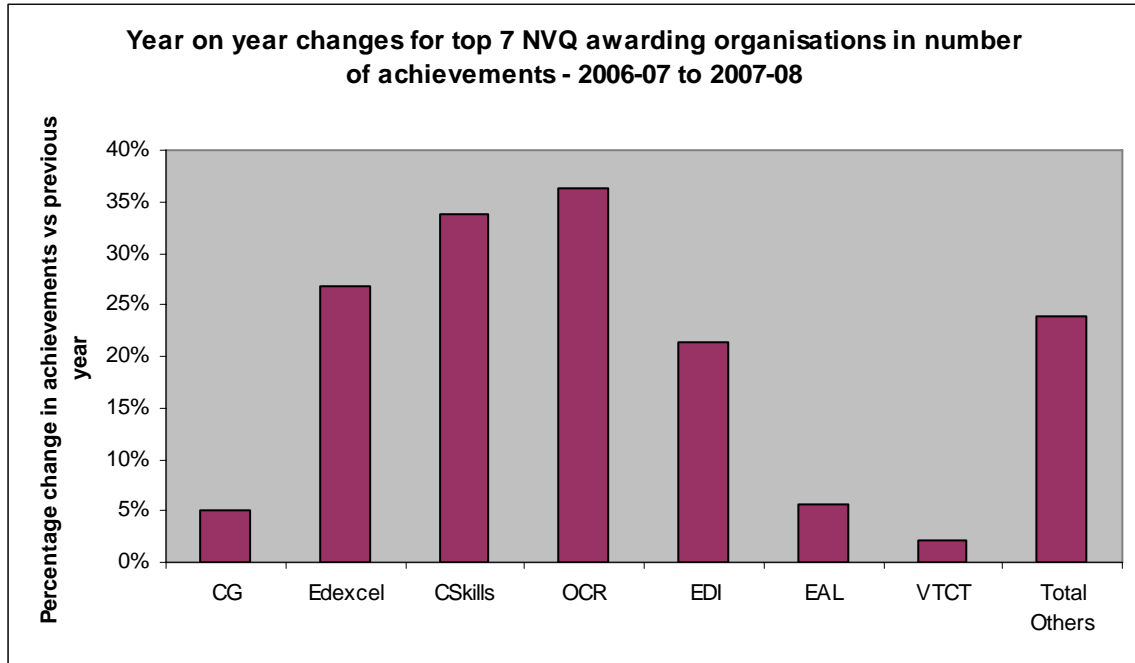
Source: Ofqual statistics database providing a snapshot for each year featured, extracted in December 2008.

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.

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