



How have apprenticeships changed in 2017/18?

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MAIN INSIGHTS

When recuperating from the loss in starts in the year after the introduction of the levy, the providers and employers of the North will have more work to do than the other regions of England to meet the local demand for skills.



1.4m job openings in the UK between 2014-18

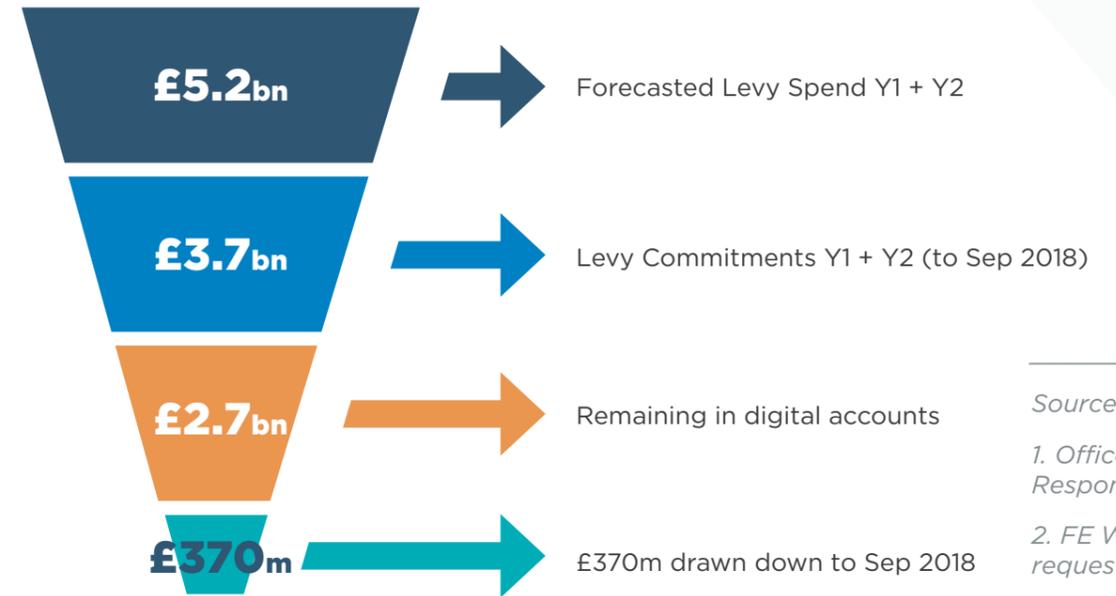
The **target** for apprenticeship starts set by the **Greater Manchester Combined Authority** for 2020



40,000 per annum

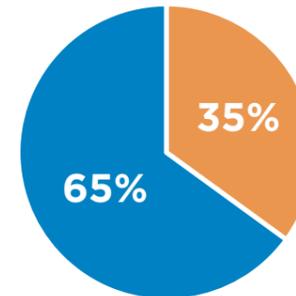


Forecasted Levy Payments 2017/18- 2018/19 [Y1+Y2]



Sources:
1. Office for Budget Responsibility
2. FE Week FOI request

% of Projected Levy Spend committed, approved, and started in 2017/18



Not all commitments have yet converted into starts, and as the cost of the start is not paid in advance, only a small amount of the money has gone out to providers.

We estimate that only 35% of this committed spending has begun to be paid out in instalments.

FE Week claims that at most 14% of commitments have been drawn down.

Financial year (original OBR forecast)	17/18	18/19	19/20	20/21
Apprenticeship levy (Billion £)	2.7	2.8	3	3.1
First 4 year total (Billion £)	11.6			

Financial year (original OBR forecast)	17/18	18/19	19/20	20/21
Apprenticeship levy (Billion £)	2.6	2.6	2.7	2.8
First 4 year total (Billion £)	10.7			

Downgrade over four years	-8%
	£-900,000,000

Analysis by FE Week

Source: Office for Budget Responsibility: Economic and fiscal outlook. November 2015 and March 2018

INTRODUCTION

In 2012, a set of reforms were applied to apprenticeships which initially caused a decline in starts and achievements, along with an increase in drop-out rates. However, two years later not only had apprenticeship starts started to rise again but “the...reform improved the job matching of young people to available employment opportunities, which was the reform’s ultimate purpose.” Over a year on from the introduction of the apprenticeship levy we are still unclear about what the future of apprenticeships in England will look like. There has been a 24% reduction in apprenticeship starts in 2017/18 compared to the year before². However, it is too early to make any definitive assessment on these reforms. Even at this alarmingly reduced rate in 2017/18, apprenticeship starts were still 57% higher than they were a decade earlier.³

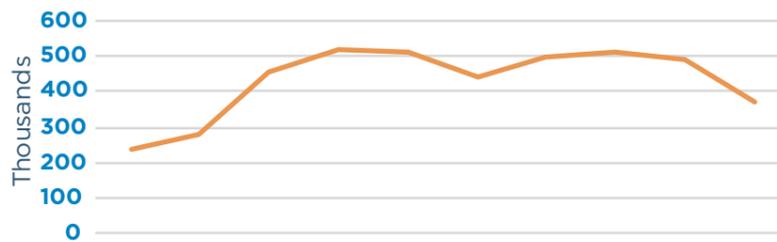
The policy changes have had varying impacts in different Sector Subject Areas (SSAs) and in the widespread adoption of new apprenticeship standards. As the final quarter of 2017/18 shows a resilience in apprenticeship take-up, it may be pertinent to focus on how the reforms can fulfil their functions; to provide the relevant skills to a large number of growing occupations and also to increase UK productivity to the level needed to be globally competitive. How can providers and employers use the circa £11 billion in levy funds that will be available in the next four years to those ends? How can employer-led demand best serve local labour market needs and how can providers best respond to a more dynamic landscape? Anticipated skills shortages post-Brexit make these questions all the more pressing.

Our aim, far from making forecasts given the current uncertainty in policy and the labour market after free movement, is to show the underlying trends in apprenticeships we observed in the year post-levy.

135,880

more starts in 2017/18

than those in 2008/9



Unspent levy commitments
to September 2018



The decrease in the number of staff being trained
to nationally recognized qualifications from 2015 to 2017



The decrease in the amount spent on training
per employee in companies employing 100+ workers from 2011-2017

NATIONAL AND REGIONAL PICTURES

In 2016/17, there were 491,300 apprenticeship starts in England, 18,100 fewer than the previous year. While the bulk of this decline may be directly attributable to the introduction of the levy at the end of that year, the apprenticeship market had already been facing signs of struggle prior to this. For example, there was a 63% increase in apprenticeship starts between 2009/10 and 2010/11. By 2014/15 there was a 12% increase on the previous year, and in 2015/16, the year before levy was introduced, there was less than a 2% increase (DFE and SFA, 2016). Review after review pointed out that the vocational training system was failing. It is probable that even without the reforms to both the funding and the content of training, the decline in apprenticeship starts was going to take place sooner rather than later.

The reforms that were needed were not merely ones that would increase numbers but improve the quality of vocational training and raise national productivity levels. Anne Milton, skills minister, has stressed that while the aspirational target of 3 million starts by 2020 is something to work for it is the quality of apprenticeships that really matters. Under the existing system “qualification [was] a poor proxy for skill – international evidence suggests this is a particular problem in the UK.”⁴ Britain’s productivity can be greatly improved not only by increasing the number of apprenticeships but also by making sure that the training is relevant to occupations that will experience future demand. Apprenticeships need to deliver the up-to-date skills that employers need. That is what the levy and trailblazer led standards have to offer.

Between 2014/15 and 2016/17, apprenticeships in Health, Public Services and Care saw the largest absolute increases (10%) in annual participation followed by Engineering and Manufacturing Technology (8%) and Construction, Planning and the Built Environment (28%). However, vital skills from apprenticeships in Business, Administration and Law were showing signs of starting to decline (0% growth) and Information and Communication Technology (ICT) actually fell by 2%. There had been larger declines in participation in Retail and Commercial Enterprise (11%) and Arts, Media and Publishing (24%).

In 2017/18, the market saw departures from these trends in each region and SSA. While the market shrank by 24% overall, ICT saw a staggering 19% increase in starts. Construction also increased by 7%. Importantly, however, this increase was not felt uniformly across regions. Starts in the North East in Construction decreased by 11% while those in the South East increased by 17%. In 2016/17, Health, Public Services and Care was the highest SSA in terms of apprenticeship participation nationally although in the NW, NE, Midlands and London it was Business, Administration and Law that ranked higher. In 2017/18, Business, Administration and Law ranked highest out of all the SSAs, overtaking Health, Public Services and Care in all regions except the South West.

These details indicate that the picture is more complex and any simplistic explanation of the impact of the reforms will undoubtedly miss some of the important trends in the making. It is evident that despite the overall decline in 2017/18 there have been very large gains in certain SSAs and qualification levels, indicating that the decline was largely caused by supply not being well placed to provide the right skills at the right level needed by the market.

DRIVERS OF DEMAND

There are signs that while the majority of the levy remains unspent, that levy payers are willing and committed to apprenticeships.⁵ 92% of all levy payers agree with the reform in principle, and between 93%-100% of employers in each of the Financial, Legal and Professional sectors intend to use all of their levy.⁶ Between August 2017 and July 2018, there were 202,260 fully agreed levy commitments, approximately 15,000 pending approval and 189,800 non-levy starts. Looking at the numbers in this light paints a clearer picture of the year that followed the levy.⁷ The positive view most levy payers have expressed in initial surveys about the reform is unsurprising given the sharp growth in labour market demand for numerous occupations and the existence of skills gaps across regions.⁸

Key aspects of some providers' offers aren't well promoted. Levy payers' lack of information [about offers, standards, frameworks] has also meant last minute changes and delays to apprenticeship starts.

Toni Monticelli

an upward trend in apprenticeship starts. As more employers and providers are clearer about the process and more standards get approved for delivery, there is cause for cautious optimism that demand for apprenticeships is on the rise. Experience on the ground supports this evidence. Helen Meakin, an apprenticeship Key Account Manager found that many levy payers were "not in a hurry" to make the correct decisions on how to spend their levy in 2017/18. Toni Monticelli thinks it is probable that the "first batch [of the levy] will be lost" while providers and employers try to implement a business model that works, and while the standards that employers really want get approved. However, these obstacles are temporary and suggest that we should see an increase in demand in the next couple of years.

While the first reported apprenticeship starts between August and April 2017/18 were lower than starts in the same months in 2016/17, starts in May, June and July 2017/18 were higher than in those months the year before [Figure 1]. Regular caveats when interpreting data in unusual circumstances apply; April 2017 deviated from previous years as abnormally high apprenticeships starts were recorded prior to the introduction of the levy. The increased number of starts later in 2017/18 possibly indicate the employers are recovering from the confusion that immediately followed the introduction of the levy and we are in the process of witnessing

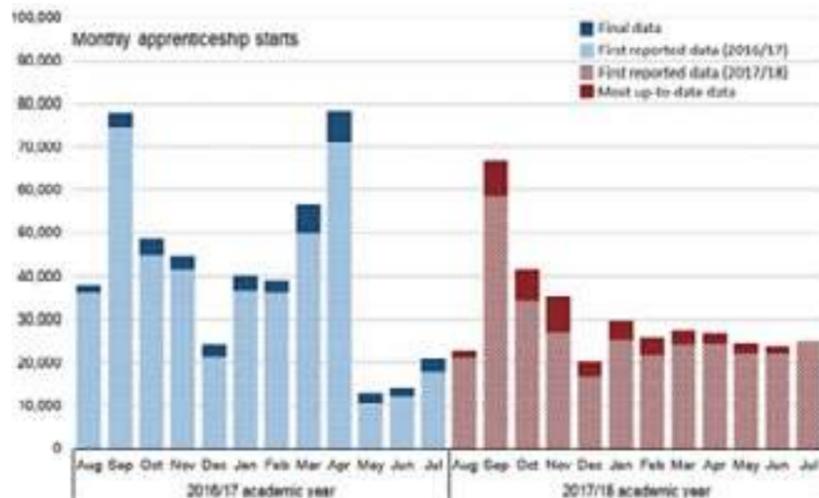


Figure 1: Apprenticeship starts by month between August 2016 and July 2018

Source: DFE, 2018

This recovery would be very well timed. The UK economy will have more than 1.4m job openings for all occupation groups between 2018-2024, and it is already operating at record high levels of employment (EMSI, 2018.1). The supply of labour will be affected by Brexit, at a time when 13% of employers report skills gaps in their workforce and approximately 1.27 million existing staff are deemed to be lacking full proficiency in their role. The skills gap density is highest in Hotels and Restaurants and increasing in the Primary sector. These are two sectors that are forecasted to be hit hard from the lack of access to the EU labour market (Employer Skills Survey, 2018).

There has been much speculation as to the ability of these sectors in particular to find the right skills in the local workforce post-Brexit. Even a look at the recent past shows that we have had an annual job growth in the Accommodation and Food sector of approximately 28k jobs nationally and the same size (27,960) of cohort of apprenticeships in Hospitality and Catering in 2016/17.⁹ This does not factor any job churn or lower than average achievement rate, suggesting that apprenticeships in these subjects at current levels are very far from sustaining the demands of the market in the coming years when the supply of foreign workers will be much lower. The picture is worse for SSAs such as ICT which tends to have lower uptakes among apprentices and yet are also forecasted to see substantial job growth. Employers' investment in the skills of their existing workforce and new recruits is becoming more and more a matter of necessity.

There is pronounced regional variation with regards to demand for apprenticeships. The region to lose the most in numbers was the NW, decreasing -21,610 or 27%. Yet the NW remains larger than all the other regions of England in apprenticeships. This region is forecasted to be driving 11% of the annual growth in jobs in England in the coming years. When recuperating from the loss in starts in the year after the introduction of the levy, the providers and employers of the North will have more work to do than the other regions of England to meet the local demand for skills.

Failure to do so will mean the Northern Powerhouse and other local strategies will be impacted negatively. The latest GMCA strategy, for example, aims to increase apprenticeship starts to 40,000 annually by 2020. This was already an ambitious goal compared to the 28,430 starts in 2016/17, so meeting that target from the current 22,740 will require all hands on deck.¹⁰

One obvious recommendation would be to encourage employers who are planning to use the levy for new recruits to better advertise the vacancies for apprenticeships. In 2016/17, the number of vacancies posted nationally on the apprenticeship vacancy online system amounted to only 34% of the number of apprenticeship starts. Among important SSAs such as Health, Public Services and Social Care that percentage was only 15%.¹¹ Providers would do well to help employers reach the right individuals to start on apprenticeships by getting more involved in the recruitment process. This could also contribute to more equality and diversity in the apprenticeship system post-levy.

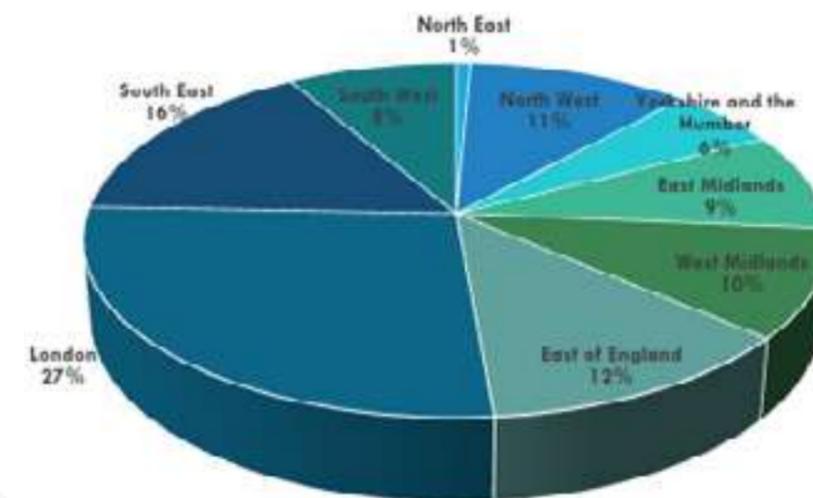


Figure 2: Job Growth in England regions, 2018-2019.

Source: EMSI 2018.1

SPOTLIGHT ON: GREATER MANCHESTER APPRENTICESHIP MARKET

Outside of London, Greater Manchester LEP has the largest concentration of financial and professional services jobs, with 130,223 jobs in 2018 and growing at a faster rate than London [EMSI 2018.1]. It is also the third largest LEP in Administrative and Support Service Activities after London and the South East. Greater Manchester experienced less of a reduction in apprenticeships starts (20% less than previous year) than the national average in 2017/18.

For the impact of a reduction in the rate of supply of skills to be fully understood, it is necessary to consider GM's contribution to the UK's growth. Of the ten major city regions (including the South East), GM LEP will have the third highest growth in jobs after London and the South East. GM LEP has the second highest GVA (after Leeds) of all the Northern city regions.¹² GM accomplishes this in spite of 9.6% of its residents having no qualifications, and a low skilled workforce with lower productivity than the UK average.

One of the complex set of reason for GM's low productivity has been the higher propensity of its employers to implement a 'low cost, low value, low skill' business model than the rest of the UK [New Economy, 2016]. Another well documented cause of low productivity is the low take up of qualifications at levels 4 and 5.¹³ With an increasing number of levy payers expressing interest in higher levels and the larger suite of degree apprenticeships being approved, the apprenticeship reforms might be that catalyst needed to increase qualified workers at these levels.

Our analysis has shown that Sales Accounts and Business Development managers, Buyers and Procurement Officers, Administrative occupations, Finance and Investment Analysts will be much needed in the LEP between 2018-2024. Yet apprentices in Business, Administration and Law experienced a 20% decline in numbers in 2017/18. We know that levy payers in those industries have been welcoming the chance to recruit more apprentices [BPP, 2018]. We see indications of this SSA showing the largest switch to the newly approved industry standards especially in the 25+ age cohort (57% of apprenticeship starts in this subject group nationally were on standards). And yet more needs to be done to raise employer's awareness of the 58 different standards between levels 2 and 7 that will be on offer in the coming years in order to rise to the challenge the growth in this sector presents.



Figure 3.
Job Growth in
England regions,
2018-2024.

Source:
EMSI 2018.1

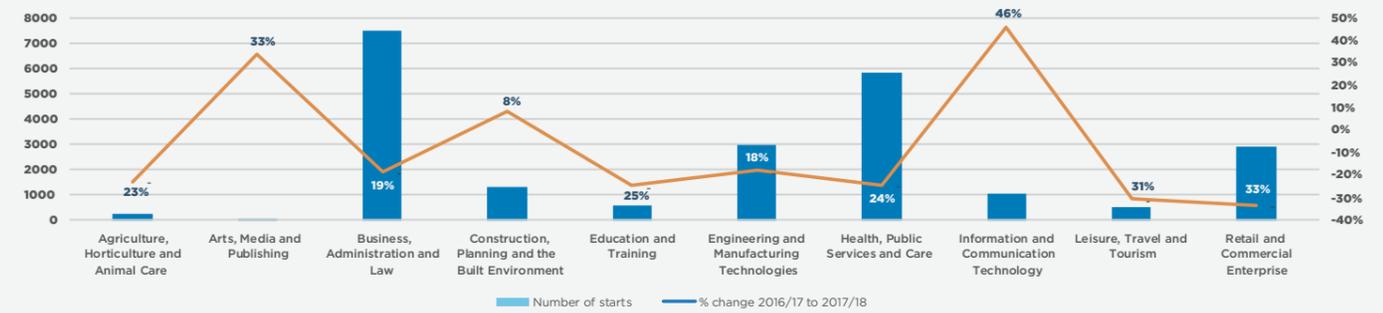


Figure 4. Trends in GM apprenticeships 2016/17- 2017/18

Source: DFE¹⁴

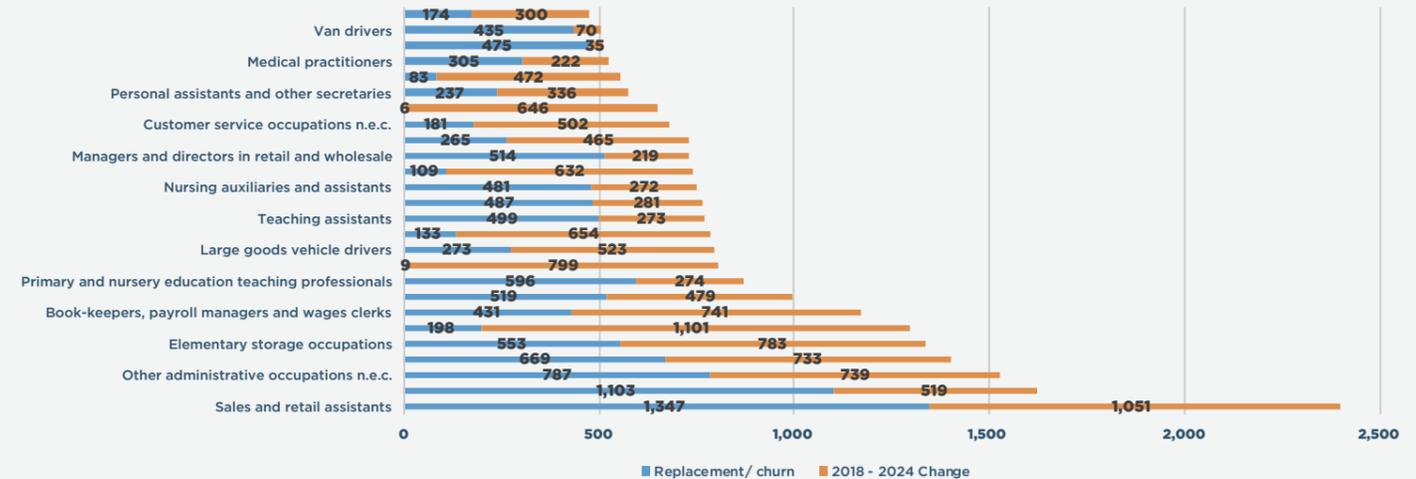


Figure 5. Job openings in GM 2018 - 2024

Source: EMSI 2018.1

This growing industry is just one instance where the future supply of skills needs to be bolstered to meet demand. Figure 5 above shows a range of occupations that will see large numbers of job openings in GM in the next period. Not only will skills be needed from large apprenticeships subject areas such as Business, Health and Social Care, Retail, Engineering and Construction but also in subjects that have traditionally seen less participation such as Information, Communication and Technology. ICT needs to be further endorsed to match the job openings for IT telecommunications professionals, technicians and specialists managers. That in GM this the highest growing SSA in 2017/18 (Figure 4) is a reassuring sign.

STANDARDS: A SUCCESS STORY

Recent apprenticeship reforms reaped the best rewards when it came to the introduction of occupation-focused standards developed by groups of employers. At the end of 2016/17 around 5% of starts were on standards, in 2017/18 that percentage skyrocketed to 44%. This lapping up of trailblazer-led programmes has led the government to confirm that the last date for new starts for all remaining live apprenticeship frameworks will be 31 July 2020. This certainty has been lacking in other elements of the reforms.

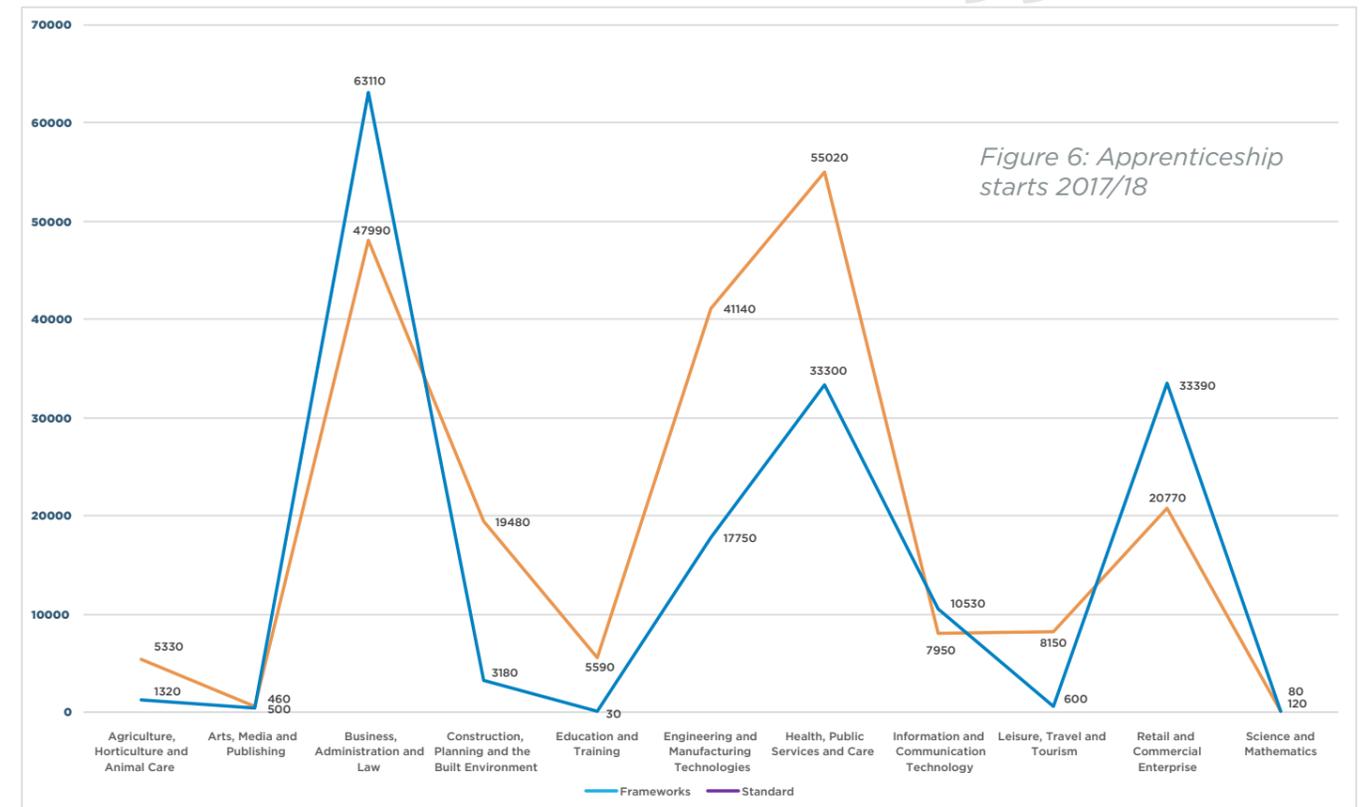
Some SSA's embraced this switch to standards faster than others. At the national level, the number of starts on standards exceeded those on frameworks in Retail and Commercial Enterprise (62% of starts on standards) Business, Administration and Law (57%), and Information and Communication Technology (57%)¹⁵. This shift in Retail and Commercial Enterprise may be surprising given that this sector has seen the largest proportional drop in apprenticeship numbers over the last four years. The most popular standards after Hair Professional were Hospitality Team Member and Hospitality Supervisor in response to clear labour market needs. The introduction of new standards designed by industry leaders may be making apprenticeships in these industries more relevant again.

The presence of new industry standards have also had a positive impact on apprenticeships in Information and Communication. ICT saw 19% increase in starts in 2017/18. Standards such as Infrastructure Technician, Digital Marketer, Digital and Technology Solutions Professional, Data Analyst, Software Development Technician, Software Developer, Network Engineer, and others (in order of popularity) had significant numbers on Levels 3, 4 and 6. 46% of levy payers said they would be investing their levy in digital skills [The Open University, 2018]. These are promising signs for apprenticeships in this agile industry that features high on national and local agendas.

The apprenticeship reforms reaped the best rewards when it came to the introduction of occupation-focused standards developed by groups of employers. At the end of 2016/17 around 5% of starts were on standards, in 2017/18 that percentage skyrocketed to 44%.



The Sector Subject Area of Information and Communication, and Technology saw a 4% increase in Greater Manchester LEP... and saw a small reduction of only 1% [nationally] post-reform compared to the national average decline of 17%. Standards such as Infrastructure Technician, Digital Marketer, Digital and Technology Solutions Professional, Data Analyst, Software Development Technician, Software Developer, Network Engineer, and others (in order of popularity) had significant numbers on Levels 3, 4 and 6.



Similarly, starts on Team Leader/Supervisor, Customer Service Practitioner, Operations/ Departmental Manager, Business Administrator, HR Consultant/Partner and several Accounting related standards were in the thousands, reflecting the indications of primary research that employers across all sectors would be using their levy to invest in management and leadership skills [BPP 2017, The Open University, 2018]. An interesting one to watch will be Construction. In spite of many industry voices objecting to the levy, Construction fared relatively better than other subjects in 2017/18, and with Brexit predicted to have a large impact on firms in this sector it is reasonable to expect the solid demand for apprenticeships to be maintained.

There are indications that there is an aversion to relying on apprenticeships to provide purely clinical or hard skills. While those hard skills are often the cause of skills gaps, Helen Meakin found that "providers don't always have the expertise to provide standards with hard skills and levy payers don't have the administrative capacity to run them internally. Hard skills are too hands on, too prohibitive." Because of administrative hurdles she has seen an example where trailblazers are not using the standards for hard skills they have developed themselves. The Health industry, along with other sectors in need of a variety of hard skills, will instead likely use a lot of the funds to upskill in administrative, leadership and IT functions in the short run [(BPP, 2017, 2018) and The Open University, 2018]. Again, as the levy pot is used at a faster rate, the groups of standards invested in might change. However, a real discussion about how to maximize gains from the standards that are more industry specific is in order.

LEVY SUPPORTED APPRENTICESHIPS

In 2015, George Osborne announced the government’s “radical” plans to force the hands of large business by imposing a levy that the government believed would deliver 3 million apprenticeship starts by 2020.¹⁶ There is little disagreement about the reasons why these plans were needed: Britain has a real problem with literacy, numeracy, and vocational training relative to OECD countries. The OECD’s report on UK skills shows that the “share of young adults enrolled in vocational education and training has risen to 43% but remains lower than in many other European countries. Apprenticeships are also less popular, pursued by around 24% of upper secondary students, compared to 59% in Switzerland or 41% in Germany.”¹⁷ The government was right to be concerned about large companies’ contribution to training of the UK workforce (Figure 7), especially given the nation’s very low productivity, which was below that of the rest of the G7 by 15.4%.¹⁸

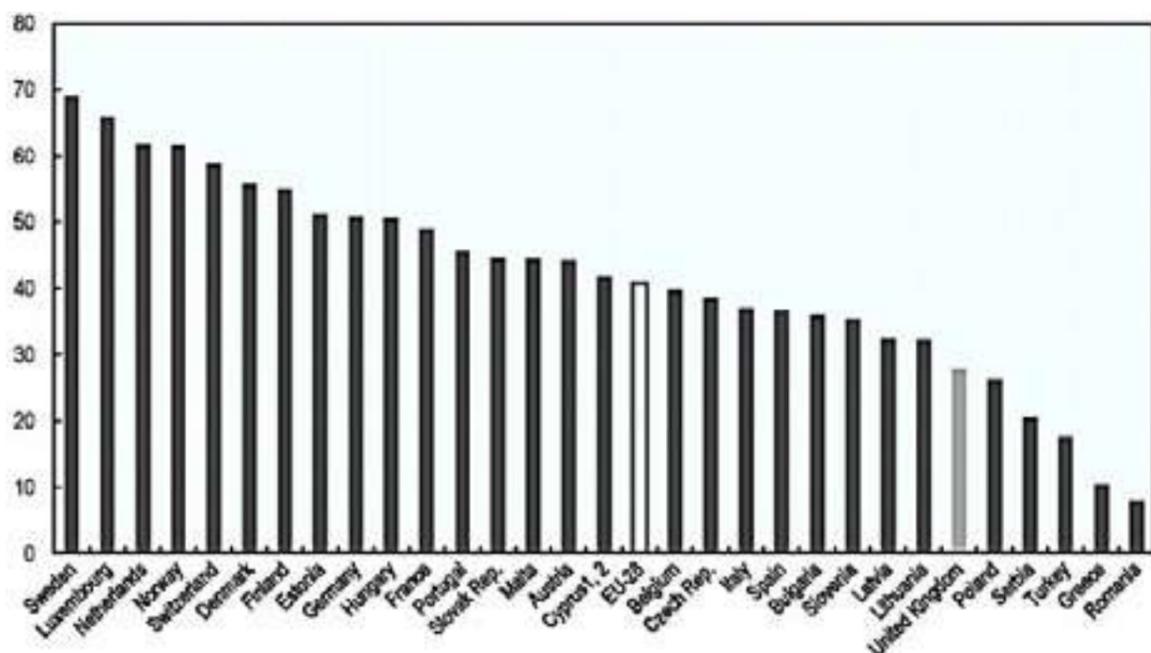


Figure 7: Participation rate in employer-sponsored non-formal education and training, employed persons, 2011.

In the year following the levy’s introduction, the post-16 education and training sector has mostly been preoccupied with the implementation of the regulation and the falling number of apprenticeship starts or levy underspend, rather than how the more long-standing issues of productivity and investment in employee training can be remedied by the changes. Some legitimate concerns about diversity and inclusion of apprenticeships being negatively impacted by levy funds going to higher-level, higher-skill, older workers already in employment have been raised, but it is still too early to draw definitive conclusions on any of the above.

What we do know, rather, is that certain structural shifts in apprenticeship provision have begun. 49.5% of starts in the year 2017/18 were levy-supported. Out of the 186,040 levy-supported apprenticeship starts, 107,540 (or 58%) were on apprenticeship standards. This shows a clear preference among levy-payers for the newly developed curricula, and we can expect this trend to become even more pronounced as more standards are approved for delivery. 68% of all higher level apprenticeships were levy funded. The levy also supported 49% of advanced apprenticeships and 44% of intermediate apprenticeships.

The reforms have also changed long standing trends in take up of popular SSAs and levels. In 2017/18, the entire market shrank by 24%, however intermediate apprenticeships fell disproportionately by 38%, while advanced apprenticeships only by 16%. Higher apprenticeships increased nationally by 32%. The reforms have had this impact, arguably, by design. The levy has favoured a higher level of apprenticeships than was previously the case

“Every levy payer wants a different model of engagement with the provider. Some want to partly administer the apprenticeships and others want the provider to fix the whole process from A to Z. We need to look at relationships differently and deliver partnerships.”
Helen Meakin



OUT OF THE 179,900 LEVY-SUPPORTED APPRENTICESHIP STARTS, 104,100 (58%) WERE ON APPRENTICESHIP STANDARDS.

In spite of initial concerns over the levy payers favouring older workers, it seems that so far the reforms have resulted in a more even age distribution in apprenticeships than was previously the case. In 2016/17, those aged 25 and over accounted for 46% of apprenticeship starts. People aged 19-24 accounted for 29% and those aged under 19 accounted for 25%. In 2017/18, the two younger aged groups increased slightly at the expense of the older apprentices (see above). It is wise to wait to draw conclusions from this at the moment though, as the amounts locked up in unspent levy and the higher level standards and degree apprenticeships still awaiting approval may well change this picture significantly.

Other details that require attention relate to the emerging trends in different SSAs. Figure 9. shows the composition of the apprenticeship market by SSA compared that landscape in 2016/17. The reforms appear to be changing the relative importance of some SSAs. The take up of Business, Administration and Law compared to the whole is growing, so is Construction, Engineering and Manufacturing and ICT.

Apprenticeships in Health, Public Services and Care, however, which slipped from the highest number of starts in 2016/17 to the second highest in 2017/18 have fallen as a percentage of all starts. Insights into the behaviour of levy payers indicate that while Human Health and Social Work activities will be the second highest industry in terms of levy spend and the fifth highest in number of large employers per industry (Figure 8), that employers in this sector will be among the least eager to use their levy. Evidence supports this: the sector comprises 13% of projected levy spend, yet, to March 2018 had only 5% of apprenticeship starts. The industry has had the lion's share of apprenticeship starts since 2012/13, and any reticence to embrace new reforms may temporarily result in a sharp reduction in overall apprenticeship starts.¹⁹ Anna Harvey, an apprenticeship Key Account Manager feels that in her experience in 2017/18 "private sector levy payers want their money back, have more control and respond quicker" to the reforms than their public sector counterparts.

Employers are confused over whether to use new standards or old frameworks. There should have been a shorter and clearer transition period.

Anna Harvey

A lot of the slow down can be explained by the negotiations happening between employers and providers over new business models that can work for them. Each side faces a new set of challenges. Harvey explains that providers that were used to dealing with one lead in an organization are now having to engage with directors, HR, administrative staff and other employees. Employers are deciding on what level of involvement they want to have in managing their apprentices. This is a process that takes place over a period of time.

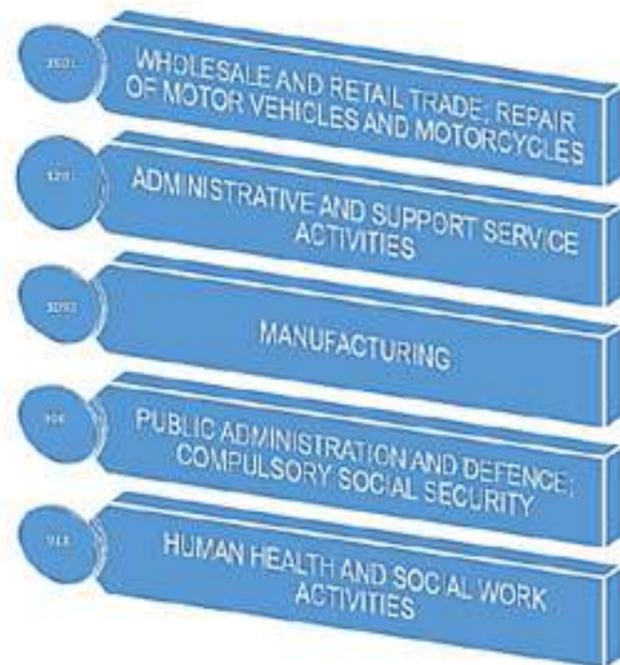


Figure 8: The Five Sectors with the greatest number of large employers in England.

Source: EMSI 2018.1

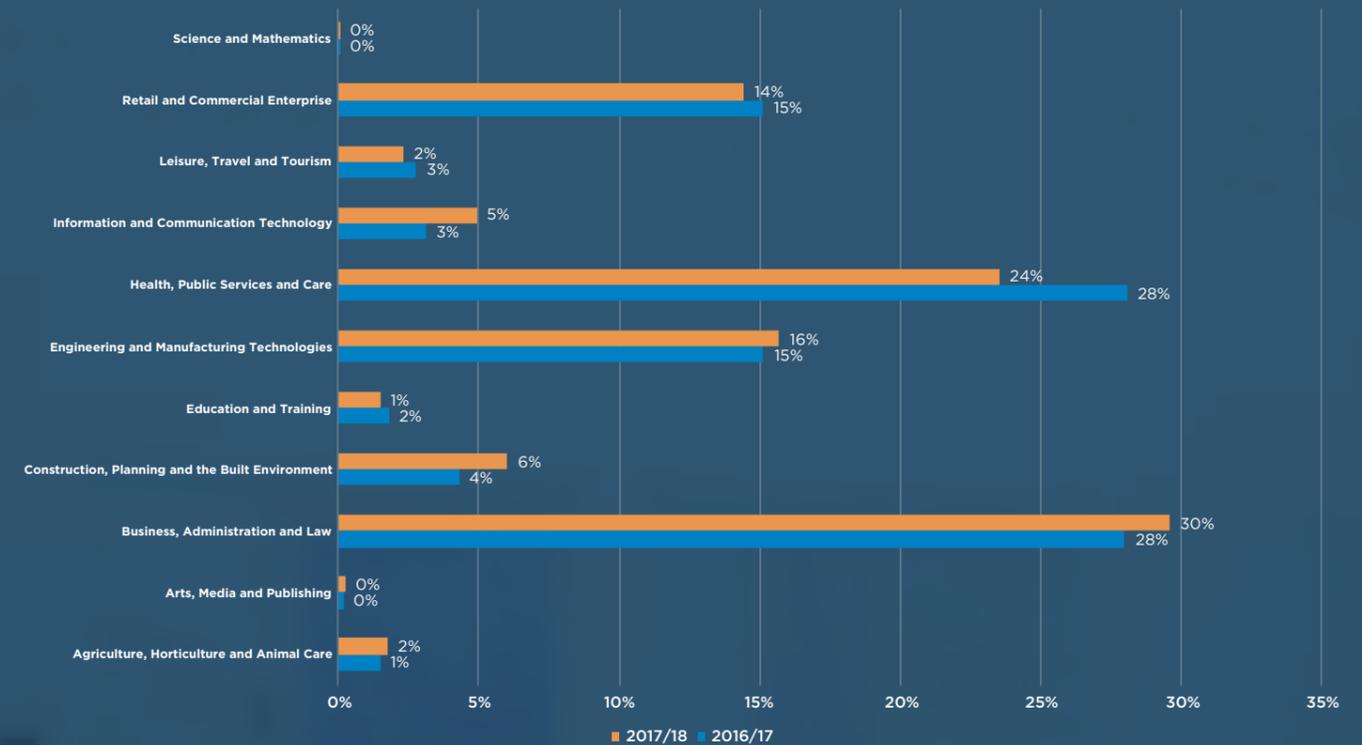


Figure 9: SSA start rates as a percentage of all starts.

Source: DFE 2017 & 2018

SUMMARY



2017/18 was a year of overall decline in numbers of apprenticeship starts, however a closer inspection of sector trends and month on month comparisons shows a mixed picture.



Business, Administration and Law, ICT, Construction and Engineering and Manufacturing Technologies gained proportionally more of a shrinking market. Health, Public Services and Care lost more than the other SSAs.



The reforms are needed to bring apprenticeships closer to the labour market than they have historically been. Apprenticeships need to be linked to occupational growth, skills gaps and post-Brexit employment needs.



Out of all the changes, the switch from frameworks to standards has taken off most smoothly. Retail and Commercial Enterprise, Business, Administration and Law and ICT are experiencing more starts on standards than the other SSAs.



The reforms have resulted in a more even age distribution of apprentices.

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