

## Contents

The **Skills Research Digest** monitors recently published skills and labour market research relevant to the work of the Department for the Economy and to the strategic and policy issues that we face in Northern Ireland.

In each case, we provide a short summary of the key points and web links to the full article or report\*. A full list of sources can be found at the end of the publication.

This quarter has inevitably seen many reports focusing on the impact of COVID-19. We have mainly included those that suggest a longer-term trend or a shift in behaviour.

For ease, COVID-related items are listed first within each section, are dated and are in chronological order. Where there are a number of items of each type, we have used the headings 'COVID-related' and 'Other research' to sub-divide a section.

We have also introduced two sections specific to COVID-19, both relating to higher education: International Students and Guidance.

Much of the non-COVID-specific research has taken on new relevance in the light of the virus. Many challenging issues will be exacerbated, but we also sensed a greater urgency to find solutions and to pursue new opportunities.

*\* Links are correct at the time of publication, however it is likely that some will break over time. The list of sources has more general links, which should help the reader to track down the original report.*

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*The research summarised here presents the views of various researchers and organisations and does not represent the views or policy of the Northern Ireland Executive or those of the authors.*

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## 16–19 EDUCATION

[24 June] **The Edge Foundation** published [\*The impact of Covid-19 on education: A summary of evidence on the early impacts of lockdown.\*](#)

- It covers the youth labour market, disadvantage, schools, further education (FE) and higher education (HE), and includes data from: the Learning & Work Institute, the Institute for Fiscal Studies (IFS), the Office for Budget Responsibility (OBR), the Sutton Trust, the Association of Colleges, Policy Exchange, the Higher Education Policy Institute (HEPI) and others.

**The Edge Foundation** published **Volume 3** of [\*Debating the first principles of English vocational education\*](#), bringing together short contributions covering:

- Conceptualising vocational education & training (VET) – Prof Chris Winch, King’s College London
- Defining technical education – Prof Martin Doel, UCL Institute of Education
- The vocabulary of vocational education – Nuzha Nuseibeh, Oxford University
- Trade unions, expertise and aspiration – Norman Crowther, TUC
- Collective action in a free market economy – Carmen Nicoara, King’s College London
- The relationship between content, learner and educator – Jim Hordern, University of Bath
- The importance of professional judgement – Geoff Hinchliffe, University of East Anglia
- The future of vocational assessment – Siân Owen, Pearson UK.

## SCIENCE, TECHNOLOGY, ENGINEERING & MATHS (STEM)

**The All-Party Parliamentary Group on Diversity & Inclusion in STEM**, hosted by the **British Science Association**, published [\*Inquiry on equity in STEM education \[in England\]: Final report.\*](#)

- Six recommendations:
  - Make a minister responsible for addressing inequity and widening participation in HE and FE.
  - Make STEM education more relevant to the lives of all young people and appealing to a wider cross section, and do more to enable students to experience STEM as inclusive and ‘for me’.
  - Take more action to address teacher shortages in STEM subjects and provide more support for teachers to develop specialist skills and knowledge linked to improving equity.
  - Fully implement the 2017 Careers Strategy for England to ensure consistency and reach.
  - Address the existing inequalities in provision of Double Award and Triple Science at GCSE.
  - Undertake a review of STEM GCSEs that considers equity issues to inform the next round of reforms.

**Equate Scotland** published [\*Women in STEM: An intersectional analysis of multiple discriminations\*](#), examining the experiences of **461** women who work or have worked in STEM in Scotland.

- 60% had experienced sexism in the workplace or in their place of education.
  - 34% did not feel confident in reporting experiences of exclusion or discrimination to their employers – 58% of disabled, 51% of black & minority ethnic (BME) and 50% of LGBT women.
  - 64% did not feel enough was being done to create inclusive workplaces or education institutions – 96% of disabled, 83% of LGBT, 81% of BME, 74% of those with caring responsibilities and 70% of women aged over 35.
  - Over 50% said that efforts to support women in STEM were not fully inclusive for women who experience multiple discriminations.
- Recommendations include: investment in better data collection across the STEM labour market; rolling out more flexible working opportunities; radical change to workplace culture; and more accessible STEM outreach.

## EMPLOYABILITY & CAREERS

### COVID-related

[May] **The Resolution Foundation published [Class of 2020 education leavers in the current crisis funded by the Nuffield Foundation](#).**

- Following the 2008 financial crisis, unemployment rose from 5.2% to 8.5% by 2011; among new education leavers with GCSE-equivalent qualifications, unemployment rose from 22% to 32%.
  - The 'scarring' continued for several years, with non-graduates experiencing the largest and longest effects; graduates were hit too, but more in terms of being stuck in lower skilled jobs.
  - Both groups had lower hourly pay than their younger counterparts.
- The 6.1ppt rise in unemployment between Q2 2019 and Q2 2020 forecast by the OBR could cause a:
  - 13% lower likelihood of a graduate being in employment three years after leaving education
  - 27% lower likelihood of employment for those with some higher or A level-equivalent education
  - 37% lower likelihood for those with GCSE-equivalent qualifications or below.
- Two years after leaving education, real hourly pay is forecast to be, on average: 7% lower for graduates; 9% lower for those with mid-level qualifications; 19% lower for those with low-level qualifications.
- Policymakers must focus on the 800,000 young adults who would have entered the labour market this year; among the recommendations:
  - For the 4–7% who might stay on in education to 'ride out' the storm, the Government should: work with higher education institutions (HEIs) to fill places 'left empty by foreign students'; create an 'innovation fund' through which schools, colleges and universities can develop additional teaching, advice and work experience services.
  - For those who prefer to enter the labour market, the Government should: develop a guarantee of a temporary job, with wages covered by the state; prioritise apprenticeships for under-25s.
- Any response will be costly, but the demographic dip will make it possible to help a larger proportion of young people.

*Prior to the Chancellor publishing his Plan for Jobs, a number of reports appeared, similarly calling for a guarantee of education and training and/or employment. See, for example, [Securing a place for young people in the nation's economic recovery: A rapid response to COVID-19](#), published by the Institute for Employment Studies (IES) with Youth Employment UK, Impetus, Youth Futures Foundations and the Prince's Trust.*

[May] **The Centre for Economic Performance (CEP) published [Covid-19 and social mobility, looking at the potential impact on young people's lives](#).**

- Before the crisis, younger generations were already facing declining 'absolute mobility': falling real wages, fewer opportunities and stagnant or declining living standards.
  - As the crisis has drastically worsened economic and education inequality, the 'COVID generation' – those currently under the age of 25 – is even less likely to fare better than past generations.
- The pandemic also offers an opportunity to give serious consideration to radical policies that will create a more mobile society and a better functioning economy; actions called for include:
  - a dual approach to upper secondary, with a credible vocational stream alongside current academic routes
  - random allocation for school and university admissions, where candidates have met a threshold of selection criteria
  - living wages for key workers.

[18 May] **The Prince's Trust published [Young People in Lockdown](#), findings from a survey of 1,022 16–25 year-olds in the UK, supported by L'Oréal Paris.**

- 29% felt their future career prospects had already been damaged by the pandemic; 46% said that finding a job now felt 'impossible'.
- 47% said they didn't feel in control of their lives (up from 38% five months earlier); 69% felt their life was on hold; 33% felt that everything they had worked for was now 'going to waste'.

## Other research

**Youth Employment UK published the [Youth Voice Census Report 2020](#), its third annual 'temperature check' of how 14–24 year-olds in the UK feel about education, training, work experience, work and prospects.**

- 66% had been offered work experience during secondary school, up 14ppt from 2019.
  - Satisfaction was high, although they would have liked more choice.
- In college or sixth form, work experience was down 6ppt to 50%, and in university it was down 29ppt.
  - 45% cited lack of work experience as their biggest barrier to getting a job.
- Careers information can be skewed by age, race, gender and eligibility for free school meals.
  - Males were more likely to be told about vocational routes and starting a business, females about academic routes.
  - Black respondents were less likely to be told about apprenticeships or university.
  - Those who had received free school meals were 20% more likely to be told about Jobcentres.
- Overall, traditional academic routes were more likely to be discussed with (year) Y9/10 students; 57% had discussed BTECs, but only 22% other vocational choices.
- Personalised one-to-one support was the key improvement requested by young people.

*83% of the 1,390 responses were received before COVID-19 took hold. The report was sponsored by BP, Pearson, the Careers & Enterprise Company and the Skills Builder Partnership.*

**The IES published [Supporting disadvantaged young people into meaningful work: An initial evidence review to identify what works and inform good practice among practitioners and employers](#), commissioned by the Youth Futures Foundation.**

- The report aims to identify the main existing evidence on interventions targeting 16–24 year-olds, including on: identification and engagement of young people; advisory support; increasing capability and reducing barriers; employer focused strategies; and retention and progression strategies.
- The evidence base is not strong enough to draw robust conclusions on what works specifically for those young people furthest from the labour market; however, general messages about effective practice include:
  - Accurate identification – trying to identify at risk young people as early as possible, possibly through tracking systems.
  - Effective engagement – using 'magnets', including cultural magnets (e.g. music, sports or arts) and financial magnets (e.g. cash vouchers), to ensure that provision looks different to compulsory education and encourages take up.
  - Effective assessment and profiling – accurately understanding an individual's needs in order to personalise support packages.
  - A trusted, consistent advisor – young people need to believe support could make a difference to them achieving their personal goals and overcoming their contextual, personal and situational barriers.
  - Delivery of personalised support packages, including options for: employability & job search skills; work experience; capabilities (agency, self-efficacy, a goal and resilience); vocational and basic skills; and addressing barriers including health & wellbeing and developing life skills.
  - Strategies focusing on employers – less common, but there is some evidence that targeted use of wage subsidies and intermediate labour markets can be effective.
  - In-work support – evidence is weaker on this, but suggests a stronger case for those with more significant labour market disadvantages.

**Nesta published [What makes for effective youth mentoring programmes: A rapid evidence summary](#), focusing on empirical studies of programmes involving older mentors working with 14–25 year-olds in all contexts.**

- Despite a large body of research, policy and comment, there is very little evidence on whether youth mentoring schemes work and, if they do, what makes them effective.
- However, the evidence shows that youth mentoring can have a small but significant impact on academic, behavioural, emotional and social outcomes for young people.

- The following appear to improve effectiveness:
  - Longer mentoring relationships – at least 12 months, but particularly 21 months
  - Goal-oriented programmes – mentees having specific goals and commitment
  - The matching process – shared values, beliefs and interests (but not gender and ethnic similarities); giving mentees the opportunity to choose their mentor
  - Careful recruitment (e.g. relevant professional background), training and support for mentors
  - High motivation levels in mentees.

**Education & Employers published [Working well: How volunteering to help young people also boosts volunteers' wellbeing](#), drawing on a survey of 1,026 employees who volunteer in schools and colleges.**

- Education volunteering supports wellbeing: 62% reported improvements to their 'sense of mission'; 77% reported increased motivation at work; 49% reported improved satisfaction with their employer or line of work.
- 55% of those volunteering the equivalent of ten or more days a year reported a strong/very strong impact on work motivation, compared to 32% of those doing fewer than four hours a year.
  - More varied types of volunteering also had a small, positive association with more benefits.
- The more supported volunteers felt by their employer, the greater the benefits they reported in all areas; the same applied when volunteers did more volunteering during paid working hours.
  - When employers actively sought out volunteering opportunities for staff, 62% said volunteering enhanced their work satisfaction, compared to 40% when their employer only supported them passively.

**The European Commission published [Lifelong guidance policy and practice in the EU: trends, challenges and opportunities](#), written by a consortium led by Warwick University's Institute for Employment Research.**

- Terms like 'work' and 'career' have undergone significant changes in meaning, reflecting a more dynamic and complex labour market; career pathways have become more diverse.
- Career guidance often takes place at transition points for an individual and can be seen as reactive.
  - Lifelong guidance (LLG), however, takes a more proactive, lifelong perspective towards careers, and encompasses the strategies, competences and skills to manage transitions; a strong social justice element is implicit.
  - EU states aspire but also struggle to develop more comprehensive LLG systems.
- A framework of 11 key features of LLG systems in the EU provides a structure to improve understanding of how it is variously organised, coordinated, funded, implemented and structured.
- The trend towards a more integrated LLG service includes an emphasis on user centrality, increased tailoring of provision and greater networking possibilities provided by digital technologies.
- New and innovative guidance practice and tools are emerging, and evidence suggests that some services are becoming more coherent and coordinated, with services offered through a range of institutions, employment and specialist providers and social partners.
- Two new key actors have been identified: health and wellbeing professionals, and data providers.
- Overall, as guidance and learning take place in more diverse settings with ICT becoming more embedded, a single practitioner, group or organisation will no longer be able to respond to the increasing need for support among more diverse user groups.
  - This implies the need to create multi-professional and cross-sectoral networks.
  - At the same time, LLG is an area where policy and administrative responsibility should be shared among several ministries at national and regional levels.

*The report makes a number of recommendations for how LLG policies and practices might be promoted by the Commission, and for potential EU interventions in the area.*

**CESifo published [The Effects of graduating from high school in a recession: College investments, skill formation, and labor-market outcomes](#).**

- Business cycle fluctuations after completing formal education have been shown to affect career paths; graduating from college during a recession has persistent negative wage effects.

- In contrast, bad economic conditions prior to completing formal education may have very different effects.
  - A lack of suitable jobs decreases the opportunity cost of continuing in the education system, thus potentially increasing educational investment.
  - However, individuals who obtain more education because of bad economic conditions (i.e. 'marginal' students) are potentially less academically prepared than those who invest in education independent of economic conditions, and may not successfully complete FE or have only minor learning gains.
- Based on data from the OECD Programme for the International Assessment of Adult Competencies (PIAAC), a 1ppt increase in unemployment results in a 0.8ppt increase in college enrolments, a 1% increase in literacy and numeracy skills and a 1% increase in wages.
  - It also increases the probability of participating in further training activities by 0.7%.
- The positive effects on college investment appear to be greater for individuals with a higher socioeconomic background, thereby increasing educational inequality.
  - The effects are also stronger for women than for men, narrowing the gender gaps in numeracy skills, full-time employment and monthly wages.
- The outcomes are most affected by the economic conditions at high school graduation – economic conditions in earlier or later years have no impact whatsoever.

**The Institute of Labor Economics (IZA) published [The effect of labor market conditions at entry on workers' long-term skills](#).**

- The report uses international data from the PIAAC Survey of Adult Skills on measures of work-relevant cognitive skills for adults from 19 countries.
- Cohorts of workers who faced higher unemployment rates at ages 18–25 have lower skills at ages 36–59.
  - Unemployment rates faced at ages 26–35 do not have such an effect.
  - These findings hold true even though, on average, people obtain more formal education as a response to higher unemployment in their late teens and early 20s.
- Skill inequality is affected: workers whose parents were less educated bear most of the negative effects.
- On-the-job learning for those in their early 20s is an important factor in skill development, and it can be negatively impacted by bad macroeconomic conditions.
- Young workers at large firms experience higher skill growth than those at small firms; this suggests consistent provision in skills development for young workers is needed because in tough economic times, young workers disproportionately work for small firms.
- These findings could inform policies intended to support young people exposed to negative shocks in their entry years.
  - Policies should be designed to acknowledge and try to remedy losses in the accumulation of skills by young people entering the workplace.

*The last two papers were not a direct product of COVID-19, but are both highly relevant as we contemplate the economic fallout from the pandemic.*

## The Institutional Landscape

### THE FURTHER EDUCATION & SKILLS SECTOR

#### COVID-related

[15 May] **The Educational Institute of Scotland (EIS) Further Education Lecturers' Association (FELA) published [EIS FELA student survey: Impact of COVID-19 and online learning](#), supported by the National Union of Students, conducted from March to May 2020.**

- 1,831 responses were received from students at 15 colleges, with around 50% on Higher National and 50% on non-advanced programmes.

- The main issues affecting their ability to engage with education included caring responsibilities, lack of access to equipment, health and changes to their paid employment.
- 90% of students had broadband access.
  - Almost 100% had access to at least one internet-ready device at home, but only 58% had exclusive use (excluding mobiles).
  - Learners from the most deprived areas were less likely to have broadband, exclusive use or access to any device (excluding mobiles) and were significantly more likely to have caring responsibilities.

## Other research

The Edge Foundation published [Our Plan for FE: Defined, career and skills focused, collaborative](#), calling for the critical role played by the UK's FE sector to be properly defined, recognised and supported.

- Against a backdrop of a changing economy, growing skills shortages, Brexit and COVID-19, the sector urgently needs to define a clear and positive way forward.
  - A new deal is needed based on a fresh vision for FE that has a clear and renewed purpose; it should be at the centre of the UK's economic plan, providing the high-quality technicians who will power future economic growth.
- The report covers: the breadth of FE provision; the purpose of FE colleges; recent funding and policy reforms; the challenges facing the sector, such as marketisation, mergers, attainment and staff recruitment and retention.
  - The term 'professional and vocational education' is used to encompass the majority of provision within FE.
- The report includes contributions from academics and stakeholders across the sector and the four nations, and case studies from UK colleges that are successfully delivering innovative practice.
- Key points:
  - A continuous decline in funding for both 16–18 and post-18 education and training has caused significant challenges for the sector – colleges are facing a staff recruitment and retention crisis reinforced by increased marketisation.
  - There are no prescribed levels of education qualification or professional status required to teach in FE in England, creating uncertainty about appropriate and sufficient staff requirements.
  - The breadth of provision offered alongside a stretched workforce often means FE providers take on more than they have the capacity to handle.
  - Class sizes have increased and learning hours per student decreased to compensate for cuts in funding.
  - Mergers have attempted to respond to funding and governance challenges, but the emerging evidence to date suggests this has had limited success.
- Key recommendations:
  - The FE sector should establish a clear definition for itself, with a focus on what it is as opposed to what it is not; individual FE providers should continue to define their own identity and missions within this.
  - An independent panel for FE pay should be formed to help establish transparency, fairness and impartiality; it would consider pay and conditions in other sectors from which FE staff may be drawn to ensure parity and fairness across the country.
  - Colleges should focus on forming collaborative groupings across geographical regions, specialisms and local education groups, bringing together schools, independent providers and HEIs.

The recommendations will feed into the work of the [Independent Commission on the College of the Future](#), chaired by Sir Ian Diamond, which is due to report this year.

England's Department for Education published an updated [Further Education Skills Index: England](#), showing how the aggregate value of skills supplied by the FE system has changed over time.

- The index estimates the 'value-added' for adult learners and apprentices who have completed their training, using the increase in earnings due to achieving a qualification as a measure of impact on productivity.

- Changes occur due to changes in: the number of people achieving qualifications in a year; the average value of the qualifications obtained; employment rates associated with the qualifications.
- The average value of qualifications can increase because: learners switch to training that offers more valuable skills; qualifications become more valuable as the quality of the training improves; employment rates for learners achieving the qualifications increase.
- The overall Skills Index has decreased each year from 2012/13 to 2016/17, with a slight rise in 2017/18 followed by a steeper fall of 17% in 2018/19.
  - The latest fall was mainly driven by a decline in apprenticeship achievements, down by 33%; achievements in classroom-based learning were down but only by 2%.
- Apprenticeship achievements generally increased up to 2017/18, particularly advanced and higher apprenticeships; there was also a small shift towards sectors with higher wage returns.
  - The recent fall in apprenticeship achievements takes place in the context of a decrease in the number of starts and increases in course length.
- The value-added for apprenticeships also increased year-on-year from 2012/13 to 2017/18, followed by a large drop of 26% in 2018/19.
- The employment rates, earnings outcomes and returns estimates are based on frameworks as it is still too early to have outcomes data for apprentices who train on new apprenticeship standards.
  - Standards are of higher quality and have additional training hours compared to frameworks; this may lead to changes in value-added as data on standards come through.
- The value-added for classroom-based training also decreased due to a combination of generally falling achievements overall, and generally decreasing achievements at full Level 2 and full Level 3.
  - This decline was steeper from 2012/13 to 2015/16, and in 2018/19 the value-added for classroom-based training decreased by 5% from 2017/18.

**The Centre for Vocational Education Research (CVER) published [\*Where versus What: College value-added and returns to field of study in further education.\*](#)**

- Using data from over 1m students over 13 years it investigates how much value attending an FE college adds in terms of academic achievement, earnings and employment, taking into account learners' prior achievements and their socioeconomic background.
  - The study considers both young learners, who generally go straight to college from school, and adult learners, who have often worked before attending FE college.
- Moving a young student from a college ranked in the bottom 15% of the value-added distribution to one ranked in the top 15% only results in 3% higher earnings on average seven years after leaving.
  - The difference for adult learners is just 1.5%.
- In contrast, the same move results, on average, in a young learner: achieving 6.5% more of their enrolled learning hours; being 11% more likely to achieve a Level 3 qualification; being 10% more likely to go on to HE.
  - Colleges with high added value seem to do more classroom-based teaching and offer more exam-assessed – rather than competency-based – qualifications.
- In terms of subject studied, engineering & manufacturing technology and business administration & law show large levels of enrolment among males and lead to large positive returns.
  - A typical young man who has worked for a couple of years before studying engineering & manufacturing technology will earn, on average, almost 7% more five years after graduating.
  - In contrast, a young man specialising in retail & commercial enterprise will not see any increase.
- Business administration & law, and health, public services & care are the two fields that show high levels of enrolment and consistent positive returns for women across age groups.
  - Women's earnings benefit more from college than men's, although women still earn less than men.
- Many specialisations show negative returns immediately after leaving college but positive returns five years after graduation, indicating that it takes time for the benefits to be reflected in wages.

*This summary was taken from an [article](#) by the researchers, as the paper is rather less easy to follow.*



## HIGHER EDUCATION (HE): APPLICANTS & STUDENTS

### COVID-related

[May] **Prospects Luminate published [findings](#) from a survey of 4,260 UK students and graduates, carried out in the first three weeks of April, exploring the effects of the pandemic.**

- 26% were planning to defer entry to university until 2021, while 31% were planning to look for online courses instead; 25–34 year-olds were more likely to defer (38%) than 18–24 year-olds (21%).
- 30% had either lost their jobs or had their job offer cancelled or deferred because of COVID-19.
- 53% felt negative towards their career prospects as a result of COVID-19, rising to 60.0% for 18–24 year-olds; women (56%) were more negative than men (47%).
  - 38% felt the pandemic would have no effect on their career prospects.

[9 June] **Unite Students published the [results](#) of a May survey of 500 UK students and 500 parents, investigating their thoughts on COVID-19, student safety and returning to university.**

- 89% of students were keen to get on campus once it was safe to do so – 79% said living away from home was as important a part of their university experience as lectures and tutorials.
- 94% had been asked to do remote learning, but only 14% preferred this way of studying.
- 76% were worried about the impact on their future career/work prospects.
- 65% were worried about their mental health and 55% their physical health.
  - 73% of parents were worried about their children's mental health and 68% their physical health.
- 86% trusted universities to provide necessary measures to keep them safe.

[30 June] **HEPI published [Students' views on the impact of Coronavirus on their higher education experience](#), based on a poll of 1,000 full-time undergraduate students, conducted 12–16 June.**

- 19% felt that communications from their institution had been 'very clear', down from 31% in a [similar poll](#) in March; 47% said the communications had been quite clear; 21% quite/very unclear.
  - 43% had received very/quite clear communications about the next year; 39% quite/very unclear.
- 63% were very/quite satisfied with the way their institution had handled remaining assessments.
- 42% were very/quite satisfied with the new online learning, down from 49% in the March poll.
- 44% were very/quite satisfied with support services, such as careers and mental health support.
- Looking ahead to the next academic year, 71% expected some learning to be online, while 18% expected it all to be online.

### Other research

**HEPI and Advance HE published the annual [Student Academic Experience Survey 2020](#), the results of responses from more than 10,000 UK undergraduates.**

- Overall, 39% reported good/very good value for money, down from 41% in 2019, reversing a two-year recovery following a steady fall from 53% in 2012 when England introduced £9,000 tuition fees.
  - The drivers of good value are teaching quality, course content, the campus buildings and student support.
  - Disruption caused by industrial action and COVID-19 – which occurred during the period that the survey was being completed – appear to have had a significant influence on value scores.
- Wellbeing remains a concern, as the gap between students and the rest of the younger population continues to widen for three out of the four indicators (life satisfaction – 11% vs 27%; life worthwhile – 15% vs 31%; happiness – 14% vs 32%).
  - The gap for low anxiety narrowed slightly, but it remains worryingly large (18% vs 36%).
- Despite the above, 26% reported that their experience had been 'better than expected' (+4ppt).
  - 37% said this was down to quality of feedback (+8ppt); however, fewer students than in 2019 felt that their course had the right level of challenge (51%, -8ppt).

- Students are working harder, with 14.6 hours of weekly contact (up from 13.9) and 14.1 hours of independent study (13.8).
  - Class sizes are reducing and more time is being spent in the smallest classes.
- The main reasons young people go to university are 'to get on the career ladder' (53%) and to follow interest in a subject (47%).
  - Interestingly, both of these are stronger among state school students (55% and 50%) than they are among private school students (46% and 39%).
- 64% were happy with their choice of university and course (unchanged since 2018).

**HEPI also published [\*One for all or all four one? Does the UK still have a single higher education sector?\*](#), using five years of results from the Student Academic Experience Survey.**

- It compares the experience of locally-domiciled students in each nation under seven headings: value, finance, wellbeing, accommodation, pedagogy, workload and regrets.
  - Students from England studying in England seem to work a little less hard than those elsewhere in the UK and would be less likely to make the same choices about HE if choosing again.
  - Students from Scotland studying in Scotland have notably different opinions on funding (noting that Scottish first-degree students are not charged tuition fees in Scotland) with a higher proportion (but still under 50%) thinking HE should be free and a greater proportion believing they are receiving 'very good' value for money.
  - Welsh students studying in Wales are more positive about the staff who teach them.
  - Students from Northern Ireland studying in Northern Ireland give more positive responses across the four wellbeing questions.
- There are some important differences in the academic experience of students across the UK, but some of the differences are relatively slim and are non-existent in other areas.
  - It is therefore fair to conclude that more continues to unite than to divide HE across the UK, despite increasing devolution and increasingly divergent national policies.
- The UK's withdrawal from the EU might speed up the growth in differences, but it is equally possible that the changing nature of the UK's relationship with the rest of the world might engender closer internal working relationships.

**HEPI published [\*Postgraduate Education in the UK\*](#), using previously unpublished data to assess how the landscape has changed since a similar report a decade ago.**

- There were 566,555 postgraduate students in 2017/18, of which 63% were in their first year – up 16% since 2008/09.
  - 65% of new postgraduates were studying for master's degrees, 10% for doctorates or other research degrees, 7% teacher training and 18% a range of diplomas, certificates, professional qualifications and modules.
  - The most popular discipline was business & administrative studies (20%), followed by education (14%) and subjects allied to medicine (12%).
  - 64% of research postgraduates were studying STEM subjects, compared to 32% of taught postgraduates.
  - 53% of new UK-domiciled postgraduates were studying full-time; in 2008/09 59% were part-time.
- 60% of new postgraduates at UK institutions came from the UK; 32% from outside the EU; 8% from EU countries; 53% of master's students came from outside the UK.
  - Chinese students formed 38% of the non-EU postgraduate cohort by 2017/18.
- With the introduction in England of £10,000 master's loans for home/EU students in 2016, numbers grew by 29% in one year and by 59% among those from the most disadvantaged areas.
- The 2008 recession saw a marked rise in the take up of master's degrees, as employment opportunities were restricted and people brought forward their plans to study.
  - Postgraduate employment was slower to fall and faster to recover than for those with only a first degree.
- The female to male ratio among new postgraduates was 60:40, compared with 55:45 in 2008/09; the gender ratio varied considerably – and predictably – by discipline.
  - White men, particularly disadvantaged, were less likely to undertake postgraduate study.

- The proportion of those aged under 30 had grown by 5ppt to 57% since 2008/09.
- Women postgraduates earned 28% more than women with only first degrees; for men it was 12% more; however, postgraduate-qualified women still earned 14% less on average than men.
- Transnational postgraduate education – people taking UK qualifications abroad – had more than doubled since 2007/08 and overtaken the number of overseas postgraduate students in the UK.
- Demand for postgraduate education is likely to grow over the long term – there could be an additional 22,750 undergraduates moving directly to postgraduate study by 2030 in England alone.

**HEPI published [PhD Life: The UK student experience](#), drawing on data from the Nature PhD Students Survey 2019 and the Wellcome Trust's 2020 report on research culture.**

- The average PhD student works 47 hours per week; for those on the basic Research Council stipend, this equates to earning less than the minimum wage.
- 78% are satisfied/highly satisfied with their degree of independence.
- 63% see their supervisor for less than one hour per week; 23% would change their supervisor if they were starting their PhD again.
- 80% believe a career in research can be lonely and isolating; 37% have sought help for anxiety or depression caused by PhD study.
- 25% feel they have been bullied and 47% believe they have witnessed bullying; 20% feel they have been discriminated against and 34% believe they have witnessed discrimination.

**IZA published [Are universities important for explaining unequal participation in student mobility? A comparison between Germany, Hungary, Italy and the UK](#), an investigation of factors affecting international mobility among disadvantaged students.**

- Disadvantaged students have lower participation rates in international mobility schemes, and therefore miss out on their positive impacts on career progression.
- Results show consistently across all four countries that they lose out on mobility experience due both to their background and to being clustered in universities with lower mobility opportunities.
- In the UK about 60%, in Hungary 30%, Italy 20% and Germany only 10% of the socioeconomic gap is accounted for by individual and university characteristics.
  - The differences could be caused by varying levels of upper secondary school graduates' selection into HE and of segregation of universities.
  - University support and excellence, while important for explaining mobility uptake, do not appear to mitigate unequal uptake in any of the countries examined.
- If mobility opportunities and grants were distributed equally across universities, independent of their intake of disadvantaged and low ability students, the socioeconomic gap in mobility uptake would likely be smaller.

**The Higher Education Authority, Republic of Ireland (RoI), published [The impact and experience of foreign languages in the context of Erasmus+ in all education sectors in Ireland](#).**

- The study explored participants' awareness and attitudes towards foreign languages, the extent to which Erasmus+ increases foreign language competence, and how to maximise its impact.
- The main findings highlight the importance of: encouragement and positive role models; the agency of the learner; the consistent provision and quality of language education; speaking opportunities; and the perceived accessibility of the language.
- Erasmus+ learners are more likely to:
  - perceive themselves as part of a continuously evolving language community
  - show greater linguistic flexibility and openness to new languages
  - employ their whole linguistic repertoire in formal and informal learning settings, irrespective of proficiency.

*The Irish Government's languages strategy aims to address deficiencies in foreign language education, recognising that effective communication in first and other languages is a key competence for personal development, active citizenship, social inclusion and employment.*

## HE: INTERNATIONAL STUDENTS POST-COVID

[7 May] **MillionPlus, the Association for Modern Universities, published the policy briefing, [International student recruitment in the age of Covid-19](#).**

- There were already some significant changes due to affect students from overseas; specifically, the introduction of the new immigration system and the ending of the transitional phase of the UK withdrawal from the EU.
  - However, there are now more immediate concerns, and the enormous value of these students to society and the economy has been put into even sharper focus.
- In partnership with universities, the Government must:
  - use the expertise and capabilities of UK universities, and build on the trust between government and institutions with Tier 4 student immigration licenses
  - provide clear and timely guidance, with established deadlines and lead-in times
  - enable greater flexibility in the system, building on proven institutional judgement
  - ensure no students or universities are negatively impacted retrospectively through having taken decisions where no clear guidance was available
  - provide clarity and assurances for EU/European Economic Area (EEA) students as the immigration system changes, and work to keep the UK competitive and attractive to this market in the years ahead
  - make changes to the Tier 4 system to improve its effectiveness and to release capacity
  - publish a new International Education Strategy designed to combat the impacts of COVID-19.

[May] **The Russell Group of 24 UK universities published [Giving the UK a competitive edge in the international student market 2020/21](#), a three-part plan to be implemented with the Government.**

- A targeted international marketing campaign involving universities, the British Council, England's Department for Education and the Department for International Trade to show that the UK and its universities are open, safe and welcoming.
- Continuing visa reforms to streamline the immigration process – the Government should consider a range of measures to give the UK a competitive edge, including:
  - increasing the visa to 30 months
  - allowing students to apply for a visa six (rather than three) months before their physical course start date
  - reviewing compliance policies to ensure international students feel welcome
  - extending concessions for disruption caused by COVID-19.
- Seeking global consensus on recognition of online courses – some countries do not recognise international degrees with significant elements of online learning.

[8 June] **The British Council published [How has Covid-19 influenced overseas study plans in East Asia?](#), findings from a survey of 15,536 students with 'outbound' study plans, conducted 19 April to 15 May.**

- The students were from China, Hong Kong, Malaysia, Thailand, Indonesia, Singapore, Taiwan and Vietnam.
  - These eight markets represented 52% of new non-EU international students at UK HEIs in 2018/19.
  - Numbers choosing to study in the UK in 2020/21 were likely to be 12% down, leading to a drop of £463m in spending, including on tuition and living costs.
  - 29% of respondents indicated that they were at least somewhat likely to delay or cancel their overseas study plans this year.

*The British Council is also monitoring plans of those in other parts of the world, including [South Asia](#).*

[June] **King's College London Policy Institute and the Mossavar-Rahmani Centre for Business & Government at the Harvard Kennedy School published [Universities open to the world: How to put the bounce back in Global Britain](#), written by England's former universities minister Jo Johnson.**

- Even the oldest, most deep-rooted universities are finding that the combination of Brexit and COVID-19 is stretching their resilience and endurance to the limit.
- Post-crisis, the market for international students will be even more competitive, with reluctance to travel combined with fewer students having the means to do so.
  - The sector is preparing for a potential drop of 50–75%, exposing real vulnerabilities in finances.
- For much of the last decade, the UK Government has aimed to increase education exports while managing down international student numbers to help reduce overall net migration.
  - This has created a volatile policy environment which helps explain why the UK has gradually seen its share of the international education market slip over the past ten years.
- If the UK is to protect one of the few industries in which it still leads the world, it must take a number of steps to be first out of the blocks, including:
  - mitigating the effect of COVID-related international travel restrictions for international students
  - doubling post-study work visas (Graduate Immigration Route) from two to four years
  - launching a new marketing drive in India to rebalance the mix of students coming to the UK
  - refocusing the British Council on education promotion, including by establishing and operating a global student mobility network to replace the UK's participation in Erasmus, and by creating a worldwide StudyUK alumni network.

## HE: WIDENING PARTICIPATION

England's Office for Students (OfS) published [\*Differences in student outcomes: Further characteristics\*](#), experimental statistics measuring the impact on HE outcomes of a number of student characteristics.

- **Care experience:** the 2017/18 continuation rate was 5.6ppt lower than for non-care students; the 2018/19 attainment rate was 12.1ppt lower; however, the 2016/17 progression rate was 0.4ppt higher.
- **Free school meals:** the continuation rate for those on free school meals was 5.4ppt lower; the attainment rate was 13.0ppt lower; the progression rate was 4.8ppt lower.
- **Parental higher education:** the continuation rate for those whose parents didn't have a HE qualification was 3.1ppt lower; attainment was 5.7ppt lower; progression was 2.6ppt lower.
- **Sexual orientation:** the continuation rate of lesbian, gay and bisexual (LGB) entrants was 1.1ppt lower, while for those who were neither LGB nor heterosexual it was 5.6ppt lower; attainment was 2.4ppt higher and 6.9ppt lower respectively.
- **Socioeconomic background:** the continuation rate for those whose parents worked in intermediate occupations was 2.0ppt lower than for those with parents were in higher managerial, administrative and professional occupations; attainment was 5.2ppt lower.
  - The differences were even larger for students with parents in routine and manual occupations, who had never worked or who were long-term unemployed.

*The statistics are a mixture of UK-wide and England only.*

The Scottish Government published [\*Fair access to higher education: Progress and challenges – Annual report 2020\*](#), the third annual report by the Commissioner for Fair Access.

- The target is that by 2030, 20% of new entrants to HE will come from the 20% most deprived areas (SIMD20); interim targets are 16% by 2021 and 18% by 2026.
  - The 2021 interim target has 'effectively' been met early (15.9% in 2018/19), however the rate of progress has slowed, reducing optimism of reaching the 2026 and 2030 targets.
- 16 recommendations include:
  - Universities should consider adopting a common format for presenting their minimum entry requirements.
  - Universities should increase the proportion of SIMD20 entrants to undergraduate and postgraduate law courses to create a more socially representative legal profession and maintain clear focus on the recruitment of SIMD20 students to medical schools.
  - Coordinate action to address other disadvantage (age, care experience, ethnicity, disability and gender) with the wider fair access drive rather than as standalone agendas.

**The Russell Group published [Pathways for Potential: How universities, regulators and Government can tackle educational inequality](#), an action plan to transform opportunities for disadvantaged and under-represented students.**

- New analysis shows that, unless concerted action is taken to address social, cultural and economic barriers, OfS targets to eliminate gaps in access to selective universities will not be met.
  - Even if student numbers from the most highly represented backgrounds are capped, universities will be required to admit large numbers of students with low grades and some with no academic qualifications at all to meet the targets.
- Russell Group universities have taken steps to provide targeted financial support and equipment to those in need, as well as to maintain widening access programmes, including schools outreach, mentoring, parental engagement and teacher conferences.
- In the longer term, a three-pronged, system-wide approach is proposed:
  - The OfS and its devolved administration equivalents should introduce the right regulatory incentives to ensure universities can pursue collaborative and long-term work to widen the pool of applicants from disadvantaged and under-represented backgrounds.
  - Russell Group universities will apply five principles of good practice – evaluation, collaboration, leadership, transparency and co-development with users – to maximise the impact of their efforts.
  - In order to tackle inequality from the early years, the Government should introduce a new ten-year national strategy to join up efforts across departments and all relevant stakeholders to boost social mobility, and establish a new Office for Tackling Inequality.

**EDSK, an education and skills think tank, published [Admitting mistakes: Creating a new model for university admissions](#).**

- Politicians from both major UK parties have serious concerns about admissions practices, which have remained almost unchanged for three decades.
  - The OfS, in its capacity as regulator of the HE sector in England, has launched a review of the entire admissions process.
- The report analyses three issues that have attracted the most attention for their negative impact on fairness, transparency and equity in admissions:
  - The use of predicted grades for applications
  - The growth of unconditional offers
  - The barriers facing disadvantaged applicants.
- Fundamental change is needed to ensure the system prioritises the interests of students, not universities – to this end, universities must give up some of their autonomy over admissions.
- Recommendations include:
  - Require universities to publish a compulsory 'standard qualification requirement' (SQR) for each undergraduate degree, which can't be altered, at the beginning of the application cycle.
  - Alongside the SQR, require universities to state the maximum number of students they can accept onto each degree course without compromising the quality of education they provide.
  - Following the publication of the SQR for every degree, apply a new national contextual offer to the SQRs, automatically reducing the grades required by those facing the greatest level of disadvantage, thereby creating an 'adjusted qualification requirement' (AQR).
  - Remove personal statements, references and entrance tests from the process because they bias the whole admissions system against the most disadvantaged applicants.
  - Remove predicted grades from the process; instead, applicants should select any ten university degrees and rank them in order of preference.
  - On results day, automatically allocate university places based on each applicant's preference list; if courses are oversubscribed, places should be allocated by lottery among all applicants who attain the SQR/AQR; if courses are undersubscribed, all eligible students should be admitted.

**The Economic & Social Research Institute (ESRI), RoI, published [How gender and prior disadvantage predict performance in college](#).**

- Post-primary school achievement is an important predictor – its relationship with college performance is concave for college completion, approximately linear for the probability of attaining at least a 2.1, and convex for the probability of attaining a first-class honours degree.

- Females perform better in college than males, in both non-STEM and STEM fields, even after accounting for their greater prior achievement.
- Disabled students, students from disadvantaged schools and those who qualify for means-tested financial aid are less likely to complete and less likely to obtain first-class honours or a 2.1 degree.
  - However, accounting for post-primary school achievement, they perform better in college than others.
- Conditional on prior achievement, students from private exam-oriented schools and from Irish-medium schools are less likely to finish a degree and to perform well in college, possibly because their school exam results are high relative to their abilities.
- Current college policies that lower entry requirements for disabled students and students from disadvantaged backgrounds may be justified on efficiency as well as equity grounds.
- College performance might be improved by increasing entry requirements for students who come from schools that convey advantages in the post-primary exams that determine college entry.

**The ESRI published [Choosing differently? College application behaviour and the persistence of educational advantage.](#)**

- Conditional on achievement and college opportunities, students from advantaged high schools are more likely to apply to universities and to more selective college programmes.
- Students from advantaged schools are more likely to list programmes with similar median entry points (similar levels of selectivity), regardless of the field of study.
- Students from disadvantaged schools are more likely to list multiple programmes in the same field of study.
- Enrolment gaps for equally qualified applicants are smaller than differences in application behaviour; the relatively meritocratic centralised admissions system based on achievement undoes much of the effect of the differences in application behaviour.

## **GRADUATES & GRADUATE EMPLOYMENT**

**[28 April] HEPI published [Open for business? Students' views on entering the labour market, based on a survey of over 1,000 full-time undergraduates undertaken at the end of March.](#)**

- 79% felt confident of getting a graduate level job once they graduated.
  - However, 28% felt mainly anxious about entering the labour market, 23% confident, 16% uncertain and 16% overwhelmed; only 14% were mainly excited.
  - 71% said their feelings had not changed since the coronavirus crisis.
- Students defined employability as being related either to role-specific skills (68%) or to more general skills for future employment (67%).
- There were four main factors in a successful career: doing something they were interested in (49%); being happy and fulfilled (48%); having stability (47%); and having a high salary (41%).
- 64% had a specific career in mind for when they graduated, with 75% intending to go into a career directly related to their degree subject.
  - 35% intended to spend one to two years in their first role and 24% more than three years.

**[7 May] High Fliers Research published [The Graduate Market in 2020: Coronavirus update, based on a study with 87 UK graduate recruiters at the end of April and in early May.](#)**

- 49% were making changes to summer work placements:
  - 34% were moving them online, 20% delaying the start and 19% shortening them.
  - 16% had cancelled summer placements; 6% were continuing as planned.
- 40% had already completed their recruitment for graduate vacancies for autumn 2020.
  - 35% still had applications open; 10% had closed them early.
  - 40% were continuing with assessment and selection; 20% had suspended the process.
  - 39% were continuing to offer jobs; 21% were currently making no new job offers.
- 52% of those graduates who had been offered jobs will start work as planned.

- 30% of employers were reviewing the start date; 17% were postponing the start for some/all jobs.
- 34% expected to recruit fewer graduates.

Graduate Market 2020 was published in January – see Skills Research Digest Q1 2020, page 16.

## HE: TEACHING, RESEARCH & INSTITUTIONS

### COVID-related

[May] **Jisc and EmERGE Education published [Assessment rebooted: From 2020's quick fixes to future transformation](#), their second report exploring the role of edtech start-ups in helping UK universities to address their biggest challenges.**

- In early February 2020, a [Jisc report](#) (see Skills Research Digest Q1 2020, page 19) suggested that, by 2025, digital technology would make possible assessment that is more authentic, accessible, appropriately automated, continuous and secure.
- The predominant mode of summative assessment continued to be pen and paper – until March 2020, when universities had to scramble to maintain the viability of this year's assessments.
- Five distinct types of response can be identified:
  - **Trailblazing**, e.g. the University of London took 40,000 students sitting 500 exams in 160 countries from face-to-face written papers, to digital testing in one move.
  - **Innovative**, e.g. Brunel University, which was already using bring-your-own-device digital exams and moved to open-book, take-home exams, without locked-down devices or remote proctoring.
  - **Radical**, e.g. the Open University (OU), which was already using continuous, tutor-marked assessment (TMA) alongside final exams, and which cancelled most exams and assigned grades based on the TMA results, with the option to postpone for students that wanted to.
  - **Innovative flexible**, e.g. Arts University Bournemouth, which provided support for students to upload their work as digital submissions, with students given the opportunity to return and finish any uncompleted work after graduation and lockdown.
  - **Incremental**, e.g. Coventry University, which reworked scheduled face-to-face written exams as replacement assessments, preferably coursework but, if not possible, then an open-book timed assessment.
- Challenges with these approaches included: scale, pace, student access to technology, student expectations, staff skills, professional body requirements and some subject-specific issues.

*The report looks ahead to a future that offers not a quick fix but a managed transformation to a well-designed system fit for the world towards which today's school students are heading.*

[17 June] **Universities UK (UUK) published [findings](#) from a survey of 92 universities, asking about their teaching plans for the autumn.**

- 97% said they would provide some in-person teaching at the start of term; 87% were also planning to provide in-person sporting, fitness and wellbeing activities.
- The full range of student support would be on offer, including mental health support, careers advice and study skills support.
  - 95% said they would use a mixture of online and in-person services and 5% would provide them online only.
- Universities were consulting with staff and students and 90% had communicated their plans to prospective and current students, while the rest would be 'doing so imminently'.
  - 82% of universities were working with bars and cafes in their local community as they developed their plans.

### Other research

**The National Forum for the Enhancement of Teaching & Learning in Higher Education, RoI, published [INDEX: Irish National Digital Experience survey, findings from students and staff who teach in higher education](#), the first national picture of the digital lives of almost 30k students and staff across 32 HEIs undertaken in autumn 2019.**

- The aim of the survey was to highlight what makes a difference to students and staff and provide an evidence base to inform decision-making and future enhancement of digital teaching and learning.



- A majority of students agreed that when digital technologies were used on their course, they understood things better, enjoyed learning more, were more independent in their learning and could fit learning into their life more easily.
  - 48% of students and 68% of staff would like digital technologies to be used more than at present.
  - 80% of students and 64% of teaching staff rated the overall quality of their institution's digital provision as above average.
- The top suggestions for what their institution could do, or do better, to improve their experience of digital teaching and learning:
  - for students were: provide access to better, faster, more stable wifi; effective and consistent use of the virtual learning environment by staff; availability of lecture recordings; and access to reliable, up-to-date hardware and software
  - for staff were: more and dedicated time to develop digital teaching and learning; improved digital infrastructure; and more support and professional development re digital skills, digital literacies and the use of educational technologies.
- The main sources of support to use digital technology:
  - for students were lecturers
  - for staff were: online videos and resources; teaching colleagues; and support staff.
- 70% of teaching staff had never taught in a live online environment (*the report notes this will have changed dramatically since March 2020*).

According to the authors, the RoI is 'the only country with national data representative of all students and staff who subsequently experienced the sudden shift to online teaching and learning' due to COVID-19.

**[Online education platforms scale college STEM instruction with equivalent learning outcomes at lower cost](#) was published in *Science Advances*, describing a study by US and Russian academics.**

- They compared the academic outcomes and satisfaction of 325 students who were either taught fully online, through blended learning\* or fully in-person on two STEM courses at three HEIs in Russia.
  - Course content, required reading and assessment were identical for all students.
- Three separate student outcomes were compared: average assessment score; final exam grade; the results of a student satisfaction questionnaire.
  - Those taught fully online scored 7.2ppt higher on average than the other two forms of learning.
  - The final exam results were similar across the three teaching types.
  - Those taught fully online reported lower levels of satisfaction from their courses, while students on the other two methods reported similar, higher levels of satisfaction.
- Blended teaching lowered the cost per student by 15–19%, depending on the course; online instruction lowered the per student cost by 79–81%.
  - STEM courses are traditionally much more expensive to teach.

\*Blended learning combines online and in-person learning.

**King's College London Policy Institute published [Universities: perceptions, impacts and benefits – Higher education around the world](#), findings from a survey of 10,500 people in 11 countries, including Great Britain.**

- 80% in GB said research universities had an important role to play in addressing the key challenges the world faces (all countries: 77%); 64% said universities had a positive impact on the country (65%).
- 44% thought the benefits of HE outweighed the expense (56%), while 28% disagreed (19%); only 25% thought a degree led to a higher salary (22%), while 52% did not (57%).
  - 65% thought the value of a degree had declined in the past ten years (61%); 17% did not (18%).
  - 60% said access to universities should be expanded (72%); 17% disagreed (10%).
- 25% thought universities equipped students with the skills for a successful career (22%); 51% thought they did not (57%).
- 38% said universities had a positive impact on them personally (54%), 47% on their family and friends (58%) and 44% on their local communities (57%).

- China had the most positive views, scoring 88%, 86% and 87% respectively.
- 25% in GB said universities had a negative impact on them personally (19%), and Britons were among the least positive about universities' impact on local communities.
- 39% said universities generally helped to reduce problems of inequality (50%); 31% said they do not (24%).

## HE: COVID-RELATED GUIDANCE

The Quality Assurance Agency for Higher Education (QAA) published [a range of documents](#) to support the changes to learning, teaching and assessment needed in light of COVID-19, including on how to mitigate the impact on assessment, progression and graduation.

- [24 April] ['No detriment' policies: An overview](#), describing how institutions were using these to ensure students were not unfairly disadvantaged by the crisis, what they aimed to achieve, and giving examples of some of the measures providers can put in place to maintain the academic standards of awards.
- [1 May] [Should providers include a COVID-19 statement on degree transcripts: Arguments for and against](#), highlighting the dilemma facing institutions and considering the implications for how degrees would be valued under these circumstances.
- [7 May] [Assessing with integrity in digital delivery](#), aiming to ensure that awards made in 2020 would have the same value as every other year.
- [28 May] [The impact of COVID-19 on admissions and transitions into higher education](#), formed by discussions with directors of admissions and the views of a panel of HE and school experts.
  - It includes consideration of how the pandemic has affected transition to HE, how entrants can be best supported, what providers might consider when planning, and how to protect quality and standards.
- [29 May] [The impact of COVID-19 on higher education in apprenticeships: An overview of the challenges facing higher education providers](#).
  - Considerations for providers involve: their ability to adapt their teaching/training; the capacity of the employer to continue to provide an appropriate setting for work-based learning; and the extent to which the requirements of the apprenticeship can continue to be delivered.
  - The main challenges are: compliance with funding, regulatory and reporting requirements; disruption to employment; impact on work-based learning; disruption to learning, teaching and assessment; digital technology and communication strategies; access to additional support; and forward planning.
- [2 June] [Preserving quality and standards through a time of rapid change: UK higher education in 2020-21](#), guidance on planning teaching and assessment.
- [4 June] [Supporting the assessment of postgraduate research students](#), an overview of action being taken, including to enable a supportive and inclusive research environment.
- [26 June] [Building a taxonomy for digital learning](#) to help providers explain what students can expect and to help students understand the differences between learning experiences.
  - It describes the differences between the terms: online, virtual and digital learning; blended and hybrid learning; distance and remote learning; face-to-face, in-person, on campus and onsite delivery; and social and physical distancing.

QAA also produced two publications on [transnational education \(TNE\) and international practice](#) in light of COVID-19.

- [20 May] [Effective practice in UK transnational education during the COVID-19 pandemic](#).
  - Key issues for UK TNE providers include: the implications of digital delivery; student expectations; staff development; and in-country recognition of online learning.
- [21 May] [International examples of practice in response to the COVID-19 pandemic: An overview](#), on learning and teaching, assessment and feedback, and student support.
  - Common features of success include: students receiving clear and easily accessible information; institutions recognising the specific needs of international students; and universities offering financial or technical support to students who need it to continue their studies from home.

- [Examples by country](#) include China, Canada, Finland, Australia, Germany, Hong Kong, Singapore and the USA.

**Between 1 April and 30 June, the OfS published eight [briefing notes](#) on how universities and colleges were supporting students during the COVID-19 pandemic.**

- [22 April] [Student accommodation](#) covered an emerging topic of pressing concern for large numbers of students, in terms of tenancy agreements, rent arrears, getting help if they were ill, retrieving belongings, and whether they would need to continue paying rent.
  - There had been extensive government guidance on isolation, evictions and finding alternative accommodation where necessary.
  - Many institutions had contacted vulnerable students in particular, to reassure them that they would not be evicted and their needs would be met.
  - Social media was being used to help students keep in touch and socialise safely, and some institutions were housing students in self-contained units to minimise risk.
  - Many institutions were cancelling rent for the third term, including sometimes for students still occupying accommodation; they were also liaising with private landlords, while recognising that they too might be facing financial pressures.
  - UUK had estimated that the UK sector was facing losses of around £790m from accommodation, catering and conference income in the final 2019/20 term, and for the 2020 Easter and summer vacations.
- [30 April] [Supporting student mental health](#) outlined ideas and practices being implemented by institutions as well as student unions and students themselves, including:
  - Ensuring clear, accessible and timely communications
  - Adapting support services, including moving to online or phone services, and procuring new services
  - Adapting early intervention systems, including by monitoring virtual attendance and offering alternatives to exercise or socialising
  - Offering support for bereaved students, particularly international students
  - Considering the needs of those most vulnerable to the pandemic, such as black, Asian and minority ethnic (BAME) students
  - Supporting healthcare students moving into clinical practice
  - Thinking ahead to the needs of new students who might have experienced bereavement, illness or other traumatic events.
- [14 May] [Students without family support](#) outlined practical steps taken, including:
  - Offering personalised financial support in the form of hardship funds and graduate bursaries
  - Tailoring mental health and wellbeing support and providing a buddy system to mitigate isolation
  - Prioritising the provision of internet access, laptops and any other necessary course equipment for care-experienced and estranged students.
- [21 May] [Supporting international students](#) included:
  - Providing tailored information, advice and guidance
  - Organising online events to maintain a sense of student community
  - Offering grants for laptops to ensure access to online resources
  - Supporting students to report incidents of racial harassment or hate crime.
- [10 June] [Information, advice and guidance for prospective students](#) featured case studies including:
  - Collating resources such as FAQs, virtual tours and videos of information talks into a central hub
  - Providing individualised support through online chat functions, email, telephone and Unibuddy
  - Running live open days for applicants and offer-holders through video conferencing
  - Using social media channels to engage with prospective students.
- [11 June] [Postgraduate research students](#) highlighted how access to research infrastructure, supervision and exams had all been severely impacted; approaches included:
  - Adapting training to online, including virtual writing courses and retreats

- Offering and publishing guidance on remote PhD viva exams
- Publishing new digital wellbeing resources and running online workshops focused on navigating change and uncertainty, dealing with stress, building resilience and managing workloads
- Ensuring that international researchers remained connected and were developing skills to help promote themselves and their research.

*QAA published a document covering similar ground – see page 17.*

- [18 June] [Graduate students: Getting into employment](#) highlighted students' perceptions of the impact of COVID-19 on their prospects and on the wider economic climate, and featured approaches including:
  - Adapting careers services to provide tailored support for final-year students via one-to-one online appointments and resources such as careers packs
  - Launching digital platforms to allow students to exhibit their work
  - Running internships and work placement programmes online
  - Modifying courses and assessment methods to enable flexible learning for apprentices.
- [25 June] [Disabled students](#) described steps taken to adapt services, including:
  - Holding online events and Q&A sessions
  - Providing regular British Sign Language (BSL) interpreter support and transcribing lectures
  - Supplying equipment and software to ensure inclusive assessment methods
  - Encouraging employers to offer a guaranteed interview to those who meet the essential criteria.

*It also discusses the potential benefits of incorporating more remote learning and inclusive assessment into longer-term approaches.*

[3 June] **UUK published [Principles and considerations: Emerging from lockdown](#), a framework of priority issues for universities to adapt to their own settings and contexts.**

- The principles highlight health, safety and wellbeing of students, staff, visitors and the wider community as the priority in decisions relating to easing of restrictions.
  - They cover: university layout and infrastructure; teaching, learning and assessment; welfare and mental health needs of students and staff; international students; hygiene and cleaning protocols; measures to enable research to continue; student and staff engagement; and civic and local partners.

## HE: UNIVERSITY FINANCE

### COVID-related

[April] **London Economics published [Impact of the Covid-19 pandemic on university finances](#), a report for the University & College Union.**

- At that stage, universities had already suffered significant revenue losses in respect of accommodation, conferences and events activity.
  - Taking a selection of UK universities, the researchers combined recent growth forecasts with research on determinants of student demand and the most recent evidence on deferral decisions.
- Compared to baseline first-year enrolments (2018/19), it was estimated that 231,900 students would no longer enrol in 2020/21 – 24% of the baseline cohort.
  - This involved an estimated 11,000 fewer UK-domiciled students (-16%), 28,400 fewer EU students (-47%) and 92,300 fewer non-EU students (-47%).
  - This averages 1,800 fewer students per institution, although it would vary significantly by university cluster.
- This would result in a £2.5b fall in tuition fee and teaching grant income: £612m from UK-domiciled students; £350m from EU students; and £1.51b from non-EU students.
- In the absence of 'substantial underwriting... by the UK Government', the reduction in income could result in over 30,000 job losses – an average of 240 per institution, again with substantial variation.
- The estimated combined direct, indirect and induced local economic impacts of HEI activity would decline from £101.9b to approximately £95.8b, resulting in a further 32,000 job losses in local, regional and national supply chains.

The survey that underpinned this report can be found [here](#). However, [acceptance/deferral data](#) for 2020/21 published by UCAS in June showed that deferrals were actually down compared to the equivalent point last year. The number of applicants holding a firm offer was: +1% among UK-domiciled applicants; +12% among non-EU applicants; and -6% among EU applicants (reflecting a decline in applicant numbers).

[9 April] **Universities Scotland published [An existential challenge: the financial threat facing Scotland's universities as a result of COVID-19](#), outlining the short-, medium- and long-term support likely to be needed.**

- Phase one: financial support is needed to address immediate and known impacts, including from loss of income from student accommodation, conferencing, industry research and consultancy; and from additional expenditure in adapting to online teaching and assessment.
- Phase two: resilience and early recovery to cope with e.g. a multi-year collapse in the international student market, both students in Scotland and delivery of courses abroad.
  - COVID-19 has exposed how dependent the Scottish HE sector is on international student fee income to subsidise publicly funded teaching of Scottish and EU undergraduates and to underpin publicly funded research.
- Phase 3: rebuilding and adapting, including:
  - Protecting high-value employment areas threatened by the economic shock
  - Providing people of all ages with the resilient high-level skills levels needed
  - Creating broad research capacity to anticipate and respond to the big challenges beyond the current crisis, e.g. the climate emergency
  - Being a key part of the cultural wellbeing in a time of intense stress and readjustment
  - Rebuilding Scotland's deep connectedness to other nations.

[22 May] **The National Institute of Economic & Social Research published [The economics of the UK university system in the time of COVID-19](#), examining potential consequences for the sector plus mitigations, opportunities and solutions.**

- The most immediate questions facing UK universities include:
  - Will overseas students come to the UK to study in 2020/21?
  - What are the consequences of universities terminating the temporary contracts of thousands of part-time and fixed term employees?
  - How do universities ensure the safety of students and staff if/when they re-open?
- The main strategic questions for the whole HE sector include:
  - Should the government bail-out universities, should some be allowed to go bust and should there be mergers of neighbouring institutions?
  - How will the new re-introduced cap on student numbers in England operate?
  - What should happen with tuition fees – should the structure be revised?
  - Should teaching revenues continue to subsidise research?
  - Is it time to re-evaluate the marketisation of HE?
- A seven-point action plan for universities and UK HE includes:
  - Seriously consider mergers.
  - Carefully consider the rationale for moving courses online.
  - Postpone or restructure courses, particularly postgraduate courses usually filled by overseas students.
  - Reassess fee structures, community provision – including re-developing adult education departments to meet local community demand – and overseas satellite campuses which may not be needed with the growth in online learning.
  - Reassess administrative structures.
- A seven-point action plan for the UK Government includes:
  - End cross subsidisation of research by teaching.
  - Encourage, or insist that, universities charge differential fees by subjects.

- Reform the loans system.
- Rationalise the sector, executive pay and administrative costs.

## Other research

The OECD published [\*Resourcing Higher Education: Challenges, choices and consequences\*](#).

- Investment in HE has increased substantially over the last 20 years, largely because of higher enrolment, increasing costs, government priorities related to skills, and research and innovation.
- Public authorities regularly need to make and justify decisions about how to mobilise, allocate and manage financial and human resources in HE.
  - This can be challenging, as not only are the effects of individual policy choices difficult to predict and prove, but the core objectives of HE – notably the quality of student learning – are hard to measure.
- Key messages from the evidence include:
  - When designing and implementing resourcing policies, policymakers must recognise how complex interactions between various actors and market forces influence the behaviour of HEIs, staff and students.
  - Irrespective of the context and policy environment, the cost of providing HE has increased considerably, and productivity gains have proved hard to achieve.
  - Although many governments establish ambitious HE strategies, it is rare for these to be closely tied to financial resources, and examples of significant policy-led shifts in the level or sources of HE funding are rare in the OECD.
  - The fiscal impact of COVID-19 will mean policymakers having to find ways of supporting HE objectives with fewer resources; widening the scope of digitalisation in teaching and learning is a possible way to maintain access and quality at a lower cost, and raise efficiency.
  - Widely identified as an efficient and effective policy instrument, income-contingent lending has proven more difficult to adopt and more costly to implement than anticipated; means-tested grant assistance can be highly effective in promoting access and study completion, though less so in shaping study and career choices.
  - Although funding allocation based on precedent and negotiation prevails, many HE systems have adopted formulae to distribute operating funds; these are mostly input based (e.g. student numbers), although the use of outputs (e.g. graduation rates) is increasing.
  - Evidence suggests output- or performance-linked funding can have positive effects on HEI behaviour, but adequate differentiation between institutional missions and goals is required; institutional responses appear to improve if performance indicators are stable and if the funding consequences of performance-linked funding are clearly and transparently specified in advance.
  - Human resources account for about 66% of current HEI expenditure; key trends have been an increase in non-permanent employment of academic staff – potentially negatively impacting the student experience – and the expansion of non-academic management roles.
  - Governments have often sought to reshape HE systems by promoting expansion and diversification of provision or by concentrating activities in a smaller number of institutions.
  - The development of new types of institution and programme, and the expansion of private sector provision and online learning have facilitated large-scale widening of access; in contrast, concentration policies have often been pursued with the aim of increasing quality and lowering costs – the success of these policies is challenging to measure.

*The second phase of the Higher Education Resources Project will analyse HE resourcing in a number of OECD member countries, resulting in a series of country reviews and thematic policy briefs. In a third phase, this knowledge will be shared through peer-learning events and thematic publications on resourcing topics of wide interest to member countries.*

## WORKFORCE ISSUES

HEPI published [\*Pressure Vessels II: An update on mental health among higher education staff in the UK\*](#), showing a continued rise in staff access to counselling and occupational health referrals since the previous note in 2019.

- At all 17 universities studied there has been a rise in staff access to counselling of 155% in recent years.

- From 2016 to 2018 there was an increase of 16% in counselling at the 14 universities for which comparable time series data were obtained.
- From 2009/10 to the end of 2017/18, at those five universities reporting complete data, there was a rise of 172% in staff access to counselling.
- At the ten universities with data for 2009–18, occupational health referrals rose by 170%.
  - From 2016 to 2018 there was a rise of 19% in occupational health referrals at the 16 universities for which comparable time series data were obtained.
- For both counselling and occupational health, women were more highly represented.
- There is also a pattern corresponding to contract type – for occupational health data, the largest proportion of individuals being referred are professional services staff.

**UUK published a refreshed version of its strategic framework, [Stepchange: mentally healthy universities](#).**

- It calls on universities to prioritise the mental health of their staff and students by taking a whole university approach, ensuring that it is considered across every aspect of the university and is part of all practices, policies, courses and cultures.
- Recommended actions within the new framework include:
  - Demonstrate visible leadership and senior ownership of mental health as a priority to promote open conversations and sustain change.
  - Work closely with staff and students to develop mental health strategies and services.
  - Ensure accessible and appropriately resourced support for mental health and wellbeing for all staff and students.
  - Focus on staff mental health; include mental health in staff performance discussions and provide appropriate training for line managers and supervisors.
  - Clarify the key role of academic staff in supporting the mental health of students through appropriate training and development.
  - Commit to assessments and course work that stretch and test learning without imposing unnecessary stress.
- The Stepchange approach and shared set of principles inform the Student Minds [University Mental Health Charter](#), which will provide a voluntary accreditation scheme for universities.

UUK also published an open access [self-assessment tool](#), developed with the Child Outcomes Research Consortium.

**Advance HE published [Mentoring for Senior Executive Leadership in Higher Education: Potential and possibilities](#), research findings highlighting key themes to address in the design of such a scheme. [The report is available to members only.]**

**Advance HE published [Governance in Higher Education: Understanding governance performance and future challenges](#), the first of a new series of reports on the effectiveness of governance based on insights from 20 institutions. [The report is available to members only.]**

## The Workplace

### RECRUITMENT

**IZA published [Improving job search skills: A field experiment on online employment assistance](#), based on use of a website by 2,700 job seekers in Australia.**

- Unemployed workers may struggle to secure a job not only due to the lack of information but also because of poor job search skills leading to low-quality applications.
- A randomised controlled trial was used to test the effectiveness of supplementing the assistance provided by job centres with low-cost online resources designed to provide self-help to job seekers.
  - The website supplements search skills by providing editable resume and cover letter templates plus tips on how to look for and apply for jobs.

- The intervention improved the quality of job matches and increased job-finding rates, particularly among 35–50 year-olds (by up to 8ppt), with larger effects for women in this age group (up to 10ppt).
- This reinforces the case for online government assistance services that provide user-friendly, easy-to-access tools for job search and submitting job applications.

## APPRENTICESHIPS & TRAINEESHIPS

### COVID-related

[April] **The Federation for Industry Sector Skills & Standards (FISSS) published [Briefing note: The apprenticeship sector's resilience to COVID-19](#).**

- The findings are based on a FISSS survey of its members and customers (including employer-representative skills bodies, training providers and assessors), the Labour Force Survey and data on apprenticeship starts in England.
- FISSS estimates the loss of 119,077 apprenticeship starts from March 2020 to February 2021 due to the pandemic.
  - Although 43.5% of UK jobs could reportedly be done from home, the youngest and least qualified workers are least likely to work from home, making apprenticeships more exposed – 16–24 year-olds comprise 12% of employment but 54.3% of apprentice starts.
  - 8.3% of apprentices occasionally work from home compared to 25.3% of non-apprentice workers.
  - Problems with apprenticeships include difficulty engaging furloughed apprentices and a lack of tech at home.

*FISSS is the certification body for Apprenticeship Frameworks in England, Scotland and Wales and provider of commercial software to support Apprenticeship Standards.*

[May] **The Sutton Trust published [COVID-19 and Social Mobility Impact Brief #3: Apprenticeships](#), using data from England, Scotland and Wales.**

- Young people from disadvantaged backgrounds are more likely to be concentrated in apprenticeships at lower levels, to be paid lower salaries and to be vulnerable to furloughing and crisis-related redundancy.
- 156 apprentice employers surveyed in early April reported that on average just 39% of apprentices were continuing training as normal, with 36% furloughed and 8% made redundant; 17% had seen their off-the-job learning suspended.
- On average, the employers felt that 81% of their apprentices would return once economic restrictions were relaxed; 58% were confident all their apprentices would return, while 17% reported that fewer than 50% of their apprentices would resume.
- 31% said that they were likely to hire fewer or no apprentices over the coming year; this picture is likely to have worsened since April.

[June] **Cedefop published [Apprenticeships for adults: Helping secure good jobs for people and skills for businesses and labour markets](#).**

- As European countries are gradually resuming business, many are warning that some effects of the COVID-19 crisis will be sustained.
  - In some countries, concerns have been raised about the slump in numbers of apprenticeship places, partly due to provisional or permanent company closures.
- The crisis has exacerbated an existing situation – EU-wide, there are around 128m adults with potential for upskilling or reskilling.
  - At the same time, in countries with long apprenticeship traditions (e.g. Germany), the numbers of companies offering apprenticeships and of young people looking for them have been falling.
- All EU member states are seeing adult participation in apprenticeships as one possible policy solution to the need to support adults willing to train while broadening the skills base of the working population.
- This does not imply new types of apprenticeship or radically new concepts, but policies and initiatives facilitating adult participation, including more flexible learning options considering their life situations and learning needs.



- Adult participation can be supported by: removing age limits; building flexibility into apprenticeships while promoting their distinct value; offering incentives to individuals and employers, encouraging employers to use apprenticeships as a way of upskilling their workers and offering them career advancement opportunities.

*The note sees adult apprenticeships as a welcome trend, particularly as adults may make more attractive employees than young people.*

## Other research

### **The Sutton Trust published [Degree Apprenticeships: Levelling Up? Making degree apprenticeships work for social mobility](#).**

- Degree apprenticeships were established in 2015 as a potentially powerful combination of academic and on-the-job learning; numbers grew from 756 in 2015/16 to 13,587 in 2018/19.
  - Since 2017, there has also been an explosion in degree-level apprenticeships, awarding professional qualifications equivalent to a degree; there were just 19 four years ago – last year there were 8,892.
  - However, Level 6/7 apprenticeships still only made up 6% of all apprenticeships in 2018/19.
- Among the findings:
  - 68% of the growth in degree apprenticeships since the introduction of the apprenticeship levy has been among over-25s, with just 18% going to those aged 20 or under.
  - 75% of all Level 6/7 apprenticeships are clustered over six standards, with business management seeing the largest increase but having the lowest proportion of young apprentices and of those from disadvantaged areas.
  - Just 13% of degree apprentices come from neighbourhoods in the bottom 20% of deprivation, while 27% come from the most advantaged backgrounds; this pattern is the opposite of those undertaking the lowest level apprenticeships.
  - The picture is worsening – young apprentices from deprived areas made up 9% of degree-level apprentices in 2016/17, but 6% in 2018/19, while the proportion aged 25+ from the most advantaged backgrounds rose from 5% to 11%.
  - 67% of employers say that making apprenticeships accessible to those from lower socioeconomic groups is important to them, including 79% of levy-paying employers.
  - However, they report a variety of barriers faced by disadvantaged young people: 28% cited a tendency to apply to lower level apprenticeships; 27% reported that they didn't have high enough grades; 26% said applications and interviews fell short in areas other than grades.

### **The OfS published [Analysis of level 6 and 7 apprenticeships in England, highlighting key changes since 2016/17](#).**

- The number of Level 6 apprenticeships increased from 1,645 in 2016/17 to 10,825 in 2018/19, while the number at Level 7 went up from 50 to 11,655.
  - Level 6 saw a 70% growth between 2017/18 and 2018/19, while at Level 7 it was 107%.
  - The majority in 2018/19 at both levels were in business & management subjects.
- Degree apprenticeships made up the vast majority at Level 6 in 2018/19 (89%), but only 33% at Level 7.
- In 2018/19, Level 6 apprenticeships attracted 67.9% of mature learners, compared with 29.7% in the sector comparison group (a weighted group of students studying in similar subject areas).
  - 40.1% of students in the Level 6 comparison group were from minority ethnic groups, compared with just 12.3% of Level 6 apprentices; a lower proportion of students on Level 6/7 apprenticeships reported a disability.
  - At both levels, a lower proportion of apprentices were from deprived areas than in the comparison group.

### **The Social Mobility Commission published [Apprenticeships and social mobility: Fulfilling potential](#), investigating the impact that recent reforms to the English apprenticeship system have had on individuals from disadvantaged socioeconomic backgrounds.**

- There is a major disadvantage gap at every step on the apprenticeship journey:

- **Selection** – between 2015/16 and 2017/18, apprenticeship starts collapsed, with numbers of disadvantaged learners falling by 36%, compared with 23% among learners from more privileged backgrounds.
- **Quality of training** – disadvantaged apprentices planned to receive 1.5–3 months less training in 2017/18 than their peers in three notable industries: construction, engineering and ICT.
- **The levy** – disadvantaged learners are less likely to be levy funded by 3–5ppt; the apprenticeships that are most commonly levy supported are also those where the disadvantage gap is greatest.
- **Progression** – 32.7% of disadvantaged men with an intermediate apprenticeship progressed to a higher qualification compared with 39.7% of others.
- **Earnings** – disadvantaged learners earn less than their peers on average but disadvantaged women with an intermediate apprenticeship at age 28 report a 16% earnings boost compared with 10% for non-disadvantaged women.

**Cedefop (European Centre for the Development of Vocational Training) published [International mobility in apprenticeships: Focus on long-term mobility – United Kingdom](#).**

- The report is one of [a series](#) covering individual EU member states, focusing on the factors enabling or disabling international mobility for apprentices, in this case across four nations with increasingly divergent systems.
- This complexity is one of the chief barriers to successful mobility, although the structure of the system itself does not carry any insurmountable obstacles for mobility.
  - There are no limitations placed on where on-the-job training must be located.
  - Considerations around duration and level of training, remuneration and the apprentice's employment contract are considerations in the case of any cross-border mobility of apprentices.
  - Aspects such as the flexibility to arrange the 'off-the-job' learning in varied blocks of time as part of the apprenticeship standards in England could be conducive to arranging longer placements.
- For companies with cross-border facilities, the arrangement of a mobility placement as part of the apprenticeship programme should, in theory, be a viable option, and may be viewed as an attractive prospect for employers.
  - However, the UK's low levels of engagement with Europe at present, compounded by the current political landscape and low levels of language competence, are relevant to the ability to promote outbound mobility to UK apprentices.
- In terms of Erasmus+ mobility funding, the UK had the largest differential of major participating countries between the number of sending and receiving students (16,414 to 31,243).
  - This may be an indicator that the new ErasmusPro, which promotes apprentice mobility, will result in an increase in incoming cross-border mobility to the UK rather than outgoing.

## SKILLS GAPS & SHORTAGES

**The Edge Foundation published its latest skills bulletin, [Skills Shortages in the UK Economy](#).**

- It features summaries of:
  - Key trends in the UK labour market (Resolution Foundation, adapted from a November 2019 article for BBC Online)
  - How jobs have changed over the last decade ([RSA](#), published January 2020)
  - Future-ready adult learning systems ([OECD](#), published February 2019)
  - The changing nature of work and skills in the digital age ([EU Commission](#), published August 2019)
  - Career aspirations and jobs in the UK ([Education & Employers](#), published January 2020)
  - Careers, choices and prospects in Northern Ireland ([DMH Associates](#), published November 2019)
  - 2020 emerging jobs report ([LinkedIn](#), published January 2020)
  - UK skills mismatch in 2030 ([Industrial Strategy Council](#), published October 2019).
- The bulletin includes a spotlight on logistics.

**Cedefop published the latest results of its skills forecast, covering the period up to 2030, with data presented via a [visualisation tool](#).**

- The forecast takes account of global economic developments up to May 2019, when the European economy expanded for the seventh year in a row.
- The forecast was developed before the COVID-19 pandemic began.
  - The short-term economic impacts of the pandemic are very uncertain, and the current short-term forecast is likely to be over optimistic.
  - However, the key long-term factors (such as ageing population, increasing use of automation/artificial intelligence (AI), globalisation, resource scarcity and moves towards a carbon neutral economy) will still hold as member states put plans in place to deal with the virus.

*The forecast can be filtered by future trends in labour force, employment or job openings, or with a focus on country (including the UK, although with caveats around the data), occupation or sector.*

**SOLAS (Further Education & Training Authority), RoI, published [Digital skills requirements of workers in Ireland: An analysis based on Cedefop's European Skills for \[sic\] Jobs Survey](#).**

- Analysis is based on data gathered in 2014; the aim was to create a baseline for the next European skills and jobs (ESJ) survey, due to take place in 2021.
- In the RoI, the share of people working in low-skilled and medium-skilled occupations who need digital skills (at any level) is greater than the EU average.
  - ~80% of workers required either basic or moderate ICT skills to do their jobs (compared to 71% across the then 28 EU countries (EU-28)); only 8% stated that no ICT skills were required to do their job (15% EU-28).
- The need for moderate and advanced ICT skills increases with higher levels of education attainment both in the RoI and EU-28.
  - Almost 20% of third level graduates required advanced ICT skills to do their job compared to 6% of those with lower secondary education.
- The youngest cohorts have the largest shares requiring advanced ICT skills, and the smallest shares requiring basic ICT skills.
- 82% with low education attainment required at least some level of ICT skills (65% EU-28).
- The cohorts with the largest digital skills gaps (low education attainment, older cohorts, working in lower skilled occupations and low-paid sectors) are also those with the lowest levels of participation in lifelong learning activities.

**The Expert Group on Future Skills Needs, RoI, published [Together for Design: Digital, product and strategic design skills of the future](#), examining the demand for design skills over the years 2020–25.**

- Design is an important driver of economic growth, integral to both industry and society, adding strategic value, creative thinking and innovation from the earliest stages of development through to the final delivery of products and services.
- The meaning of design has evolved greatly over the past century and, with the fourth industrial revolution, is evolving again; three major types were identified as important for the RoI's economic success in a [predecessor report](#) (2017):
  - Digital design – including interactive media, UI & UX design, digital media, interaction design, multimedia design, web design
  - Product design – including innovation, process design, industrial design, manufacturing design, engineering
  - Strategic design – including service design, design thinking, co-design, design management, design innovation.
- Design roles are outperforming other growth employment areas in the RoI, increasing 0.8% between 2011 and 2019, and 0.4% between 2016 and 2019 alone.
- By 2025, occupations in digital, product and strategic design could see a growth of between 21,000 and 33,000, accounting for 2.8% of all jobs in the RoI.
  - Programmers and software professionals are expected to account for most additional jobs.
- In contrast to this demand, around 1,300 students graduate annually with relevant skills.
- Discussions with the enterprise and design community suggest, among other things, that:

- critical thinking and creativity are important throughout compulsory schooling
- smaller enterprises find it harder to attract design skills
- there's a strong desire for increased collaboration between design and business schools, industry and academia
- more flexible pathways, apprenticeships, short courses and boot camps would incentivise people in work to upskill and utilise education within an applied industry context.

**Nesta published [Partnerships for Skills: Learning from Digital Frontrunner countries](#), looking at how to build effective cross-sector partnerships to tackle digital skills gaps.**

- The report uses Tuckman's stages of group development – forming, storming, norming, performing and adjourning – to capture how the partnerships work and serve as a guide to the journey.
  - It aims to provide practical strategies for anyone interested in working collaboratively across sectors to address skills gaps, tailored to the fact that they might be at different stages of collaboration.

*Each recommendation comes with an example of how it could be implemented in practice; there are also recommendations for further reading and links to resources.*

## **AUTOMATION & AI: IMPACT ON WORK**

### **COVID-related**

[May] **The CBI published [Building a world-class innovation and digital economy: Recommendations for an innovation and technology-led recovery](#).**

- Technology and innovation are powerful engines of prosperity, inclusion and resilience that will drive radical benefits across society and support the UK's economic recovery.
  - For people: technology has been a lifeline to many during the COVID-19 outbreak; going forward, the innovation economy offers considerable economic opportunities, from new job prospects and retraining to wage growth.
  - For business: adopting innovations like cloud computing or AI can transform business growth, customer engagement and impact.
  - For the UK: innovation can supercharge regional growth and inclusion while driving solutions to society's biggest challenges; a thriving innovation economy also enables the UK to lead international collaborations in areas from digital regulation to scientific research.
- The crisis has highlighted the best of British innovation and business dynamism, but there are challenges: firms struggling with lower cash reserves; rising pressure on digital connectivity networks; a growing concern about the impact of future regulation on digital dynamism; the UK's need to navigate new trade deals and reshape the regulatory environment.
- Recommendations cover regulation, infrastructure, innovation adoption and the policy environment, as well as skills:
  - Spur a gear change in ambition to boost the UK's digital skills pipeline: integrate digital skills into both short-term employment support and a fair, inclusive skills system by 2030; develop an open and controlled immigration system that delivers the skills needed to grow the innovation economy.

[13 May] **Cedefop published [EU jobs at highest risk of Covid-19 social distancing: Is the pandemic exacerbating the labour market divide?](#)**

- A new COVID-19 social distancing risk index (COV19R) was created, based on descriptors categorising jobs by their level of physical proximity to others and their digital intensity.
- It is conservatively estimated that about 45m jobs in the EU-27 labour market (23% of total EU-27 employment) are faced with a very high risk of COVID-19 disruption.
  - Another 22% of the EU workforce – mostly medium to lower skilled service provision – is exposed to some significant risk.
- The burden of risk falls disproportionately on vulnerable workforce groups, such as women, older employees, non-natives, the lower-educated and those employed in micro-sized workplaces.
- The findings call for immediate and targeted policy responses – including job activation, reskilling and job support – to prevent ongoing job losses and widening of labour market and social inequalities.

- However, a key concern is that the groups most at risk are traditionally the ones most difficult to target with job reintegration and skills policies, even at times of strong labour markets.

## Other research

**McKinsey Global Institute published [The future of work in Europe: Automation, workforce transitions, and the shifting geography of employment](#), showing that the pandemic will not be the only trend shaping the future of work.**

- 48 dynamic cities, including London, are home to 20% of Europe's population; in the ten years to 2018 they generated 43% of its GDP growth, 35% of its net job growth and 40% of its population growth.
  - By contrast, 438 shrinking regions with 30% of the population, mostly in Eastern and Southern Europe, have declining workforces, older populations and lower educational attainment.
- Europe's working-age population is likely to shrink by 4% by 2030 due to ageing; shorter working weeks could reduce labour supply by an additional 2%.
- 22% of current work could be automated by 2030 (midpoint scenario); a large share of job losses could be compensated by job growth arising from technology, rising incomes and investment in healthcare.
- Even a 4% decline in jobs would leave a shortage of workers.
  - Unless more working from home fundamentally changes urbanisation patterns, those 48 cities could capture more than 50% of Europe's job growth, intensifying geographic concentration.
- About 94m workers may not need to change occupation but will need retraining as technology handles 20% of their current activities.
  - 21m workers may need to change occupation by 2030, most of them lacking tertiary education; newly created jobs will require more sophisticated skills that are already scarce today.
  - Workers most likely to be displaced by automation are also those most at risk in the pandemic, and the crisis could accelerate some of the displacement.
- Overcoming labour market mismatches in a post-COVID world will be a key challenge, with potentially different solutions for each community.
- Four broad imperatives stand out: addressing skills shortages; improving access to jobs in dynamic growth hubs, potentially through an increase in remote working; revitalising and supporting shrinking labour markets; and increasing labour participation.
  - Employers will need to make adept decisions about strategy, skills and social responsibility; their choices will need to reflect their workforce's skills, occupational mix and geographic footprint.
- Helping individuals connect with new opportunities and prepare for the jobs of tomorrow is a common task for every region across the EU.

**SOLAS, RoI, published [Future of jobs in Ireland – Automation risk](#) to help policymakers decide where to direct upskilling and/or reskilling opportunities for those in occupations at high risk of automation.**

- The analysis is based on 16 occupational groups and provides details on the profile of the cohorts most likely to be affected, in terms of age, gender, nationality and the region of employment.
- Based on international models, over 370k people were employed in occupations at high risk of automation in the RoI; a further 600k were in jobs considered at medium risk.
- The six occupational groups with the largest numbers of people in jobs at high risk were: operatives & elementary; sales & customer service; administrative & secretarial; hospitality; agriculture & animal care; and transport & logistics.
  - Workers in these occupational groups were most likely to have higher secondary or further levels of education and were predominantly Irish.
  - Those in agriculture & animal care and transport & logistics were primarily male, and a significantly higher portion were aged 55+ years.
- The individual occupations with the highest volumes of employment at high risk of automation were: assemblers & routine operatives; process operatives; cleaners; warehouse operatives; drivers; farmers; kitchen & catering assistants; waiters; financial, government & other administrators; construction operatives; and sales assistants.

## SKILLS POLICY

### COVID-related

[May] **The Federation of Small Businesses published [New Horizons: How small firms are navigating the COVID-19 crisis](#), examining findings from a range of surveys, including those related to skills.**

- Small businesses said that leadership and management skills were most important for the future growth of their business (51%), for product or service innovation (34%) and for organisational innovation (22%).
- Over the last year, 53% invested in or introduced improvements to working practices and processes, 49% in technology or machinery, and 41% in staff training and development.
- Recommendations for government include:
  - Provide funding to help smaller businesses to reskill, retrain and upskill their staff – this will be important for rapid economic growth, and could target sectors that have struggled most during the crisis and those who have been made redundant.
  - Support them to hire young people with joint apprenticeship and employment schemes, e.g. two employers could employ an apprentice, each paying half of the apprentice's wage.

[29 June] **The Chartered Management Institute (CMI) published [Unlocking the potential of the UK workforce: CMI policy paper on future skills and retraining](#), looking towards the recovery phase of the crisis.**

- The pandemic has created a deepened need and an opportunity to 'unlock the full potential of the UK workforce', by supporting employers to create training opportunities and an environment conducive to retraining, and by ensuring employees take up the training available.
- Recommendations include:
  - Accelerating the rollout of the national retraining scheme in England, offering a right to retrain to anyone who wants it.
  - Using the tax system to better incentivise employers to invest in training.
  - Retaining the employer-led principle for all skills policy interventions, to ensure a close link between training and employment.
  - Making greater use of bitesize courses and modular learning to meet employer demand for greater flexibility.
  - Supporting employers, especially SMEs, with the initial non-training costs of employing an apprentice with incentive payments and grants targeted up-front.
  - Providing continued job retention support which is more explicitly linked to retraining and skills and expects employers to commit to a culture of retraining and professional development.
  - Government working with chartered organisations and their existing networks to rollout training and resources at pace.

**Cedefop published a series of short analysis pieces on the impact of COVID-19, some of which are due to be published later in 2020 as longer working papers.**

- [7 May] [Jobs at risk: Coronavirus impact on EU tourism sector](#) explores which EU member states are likely to expect the highest risks, based on the importance of international arrivals and the share of small enterprises in the sector.
  - The five countries at 'very high' risk are: Malta, Croatia, Cyprus, Austria and Greece.

*The UK is missing from the map, but the RoI is among the countries considered to be 'high' risk.*
- [15 June] [Baby boomers retiring in the wake of the pandemic](#) highlights major changes in the composition of the workforce in the decade ahead as COVID-19 affects retirement decisions.
  - Europe's ageing working population is accompanied by the end of the working life of 'baby boomers' (born 1946–64), who are all expected to have retired by 2030.
  - This raises serious concerns as, in some industries where baby boomers thrived (such as manufacturing), millennials (born 1981–96) now struggle to engage.
  - The situation is expected to create a shortage of talent in the decade ahead, with employers finding it difficult to fill vacant posts.
  - It remains to be seen how COVID-19 will impact on retirement decisions.

- [15 June] [Coronavirus, automation and the future of work](#) considers the extent to which COVID-19 might impact on the rate of automation in different sectors.
  - In the sectors where COVID has had a medium-high/high impact on economic activity, 20–25% (1.4m) of new jobs expected to be created up to 2030 are at risk of automation.
  - In accommodation and food service activities – hit hard by COVID-19 – food preparation assistants seem to be the most vulnerable group; they may also be replaced by automation more easily in order to protect public health.
  - In contrast, in real estate, professional, scientific and technical activities the largest share in employment is that of business and administration professionals; even though this sector has also been impacted by COVID, potentially slowing down expected growth, it is gaining importance, while its risk of automation is relatively low.
- [26 June] [Working and learning remotely in Europe: The new normal?](#) explores the link between remote working and increased participation in some types of remote learning, which could continue after COVID-19 has abated.
  - Early assessments suggested 40–70% of active workers were working remotely, compared to 15–17% before the pandemic; between 25% and 33% of all jobs in European economies could potentially be performed from home.
  - [Analysis](#) of online learning-related queries on Google Trends shows a sudden surge in interest in online learning in the wake of the pandemic in Europe, particularly through massive open online courses (MOOCs).
  - It is too early to say whether the interest in remote working and learning will be sustained, although some commentators are predicting that the change in work organisation is here to stay.
  - Remote workers are more likely to have participated in courses, seminars and conferences or to have received private lessons or instruction outside the regular education system.
  - They do so mostly for job-related purposes, primarily seeking to acquire further knowledge in fields such as social sciences, business and law, education and ICT.

*Cedefop is designing the second wave of its ESJ survey and will publish the first insights in the second half of 2021. It will aim to answer questions about work and learning during and after COVID.*

## Other research

**The Industrial Strategy Council published [Rising to the UK's Skills Challenges](#), calling for a clear overarching vision implemented through partnership with employees, employers and training providers.**

- It presents evidence on skills challenges facing the UK, focusing on four key areas:
  - **Employer investment in training** – UK employers prefer to recruit rather than train; apprenticeships are important for increasing employer investment in training, but so are shorter upskilling and retraining options; digital developments can offer innovative, flexible solutions.
  - **The role of managers in skills development and utilisation** – managers and leaders need upskilling to fulfil their crucial role in championing and monitoring learning; better data and systems to monitor the impact of training will help them foster and support skills development and utilisation.
  - **Effective strategic and/or local partnerships** – a partnership approach is needed, supported by policy stability and continuity.
  - **Creating a positive lifelong learning culture** – developing an effective system for all is essential; information campaigns, employer and union learning representatives and managers can all play a role in communicating the benefits and necessity of lifelong learning.

**FISSS published [Briefing note: Which industries face the biggest skills challenges?](#), covering 21 sectors in the UK.**

- The main challenges:
  - **Automation** – although this could alleviate skills challenges, 45% of jobs across all sectors are at risk of automation, from 58% in hospitality to 34% in information & communication.
  - **Ageing workforce** – extending working lives can be an opportunity, however 30% are aged over 50, from 50% in agriculture, forestry & fishing to 17% in hospitality.

- **Brexit** – immigration policy will be a more significant challenge for some sectors than others; 8% are EU nationals, from 3% in public admin and defence to 15% in ‘households as employers’ (e.g. gardeners, cleaners).
- **Staff turnover** – 22% of staff leave their industry, from 14% in education to 35% in arts, entertainment & recreation.
- **Pay growth** – this can be a sign of skills shortages; pay grew 2% from 2018 to 2019, from 9.2% in water supply, sewerage & waste to 2.6% in extraterritorial organisations.
- **Working from home** (a proxy for an industry’s resilience to COVID-19) – 27% ever work from home, from 53% in information & communication to 11% in transport & storage.
- **Gender balance** – the overall female to male ratio is 1.1, from 6.7 in construction to 0.3 in health & social work.

**Nesta published [Going Green: Preparing the UK workforce for the transition to a net-zero economy](#), as part of its FutureFit project.**

- Rather than classifying industries as ‘green’ or ‘brown’, a new taxonomy – the Eco-Transformation of Industries Matrix – divides industries into leaders, neutrals, followers and laggards.
  - Followers and laggards are responsible for about 93% of UK emissions and accounted for 45% of total employment in 2018.
  - Leaders and neutrals are responsible for 7% of UK emissions and account for about 55% of total employment.
- About 50% of all employees in the UK are likely to experience an elevated risk of displacement or job transformation; male, younger and lower-educated workers are over-represented in these sectors.
  - They will need to learn new skills, but participation in adult learning is not distributed equally – the rate for leader employees is about 21%, compared to only 11% for laggard employees.
- Regions in industrial transition – including Northern Ireland, the East Midlands and West Midlands, where about 50% of jobs are with laggards and followers – will require the most support and strategic development to reduce their dependence on fossil fuels and invest in environmental activities.
- A deliberate set of policy actions will be needed for the UK to unlock the potential of the green economy:
  - More consistent use of data will be needed so that workers and students understand what career opportunities to pursue.
  - The UK should support upskilling and explore how a missions-oriented approach could help tackle some of the biggest issues in the green economy workforce transition.
  - Skills policy must not work in isolation but support inclusive innovation more broadly, ensuring businesses have the skills support needed to develop and adopt eco-innovations.

**Cedefop published [European qualifications framework \[EQF\]: Initial vocational education and training – Focus on qualifications at levels 3 and 4](#).**

- As people move for work and study more frequently than in the past, their qualifications and skills need to be properly understood to be able to match, use and develop them appropriately.
  - In Europe, vocational qualifications (VQs) are shaped by countries’ specific socioeconomic contexts, labour market characteristics and traditions, potentially hampering mobility across national and institutional borders.
- The EQF focuses on intended outcomes to help understand similarities and differences in VQs; however, national VQs are underpinned by different concepts and their use varies, making EQF information insufficient.
- The report examines: the weight given to occupational, general and transversal competences across levels and countries; the different jobs or tasks VQ holders can carry out; how they help people progress in learning; and how countries decide whether a qualification is assigned to a specific level.

**The Institute for Social & Economic Research (ISER) published [Who benefits from host country skills? Evidence of heterogeneous labour market returns to host country skills by migrant motivation](#).**

- With migration governance and policies increasingly being called into question, successive European governments have tightened their schemes to favour ‘net contributors’ who bring a range of fiscal benefits while having good social integration prospects.



- Non-economic migrants are often seen as an economic burden, resulting in tight rules and restrictions on their right to work.
- While such migrants are less likely to be integrated into the labour market than their economic counterparts, their labour market participation increases substantially with further host country 'acquisitions' such as language proficiency.
  - Good language skills help all migrants in their attachment to the labour market, and lead to higher quality jobs.
- While some acquisitions do not lead to better outcomes immediately, taking up host country qualifications or attending language courses can have long-term benefits, particularly for more disadvantaged migrants.
- In designing migration policies, it is therefore important to note that, while further courses, training and good language skills primarily benefit the employment probability of economic migrants who already have higher qualifications, they are also especially crucial for lower-qualified non-economic migrants.

## ADULT & LIFELONG LEARNING

**The Chartered Institute of Personnel & Development (CIPD) and Accenture published [Learning and Skills at Work 2020 – Mind the gap: Time for learning in the UK](#), findings from a survey of over 1,200 senior leaders in UK organisations of all sizes.**

- Only 4% of organisations identified the need to reskill employees affected by automation, and just 8% identified developing 'soft skills'; 33% said they were unable to address skills gaps.
- Most organisations are now using some form of technology to support learning, most commonly webinars, learning management systems and open education resources.
  - However, augmented reality, virtual reality and mobile applications are used by only a very small proportion of organisations and are even less likely to be used in small organisations.
- Most organisations report barriers to implementing learning and skills initiatives, with time, money and management support topping the list.
- Most organisations assess the impact of their learning & development (L&D) initiatives in some way, but only 16% assess transfer of learning into the workplace.
- Most large organisations have an L&D budget, compared with only 33% of SMEs; among those that do, resources are spread relatively evenly across different levels of employee.

*A separate report (at the same link) offers five company case studies on transforming learning.*

**The Centre for Social Justice (CSJ) published [The Long Game: How to reboot skills training for disadvantaged adults](#), drafted before the pandemic but now even more salient.**

- Low qualifications make unemployment more likely, depress earning potential and undermine the home learning environment.
  - By improving their qualifications later in life – even in basic skills – adults can start to redress these challenges.
- There is room for skills growth in existing roles and, pre-pandemic, hundreds of thousands of vacancies were hard to fill because employers could not find people with the right skills.
  - The jobs market is evolving quickly, calling into question the relevance of certain skills, and many people will need to adapt.
- For those whose skills are likely to be wiped out by a fast-changing labour market, adult learning offers a way back.
  - Adult learning also allows us to shape the jobs market by building a higher-skilled economy, and supply-side skills policies for adult learners remain a vital part of any successful attempt to work towards such a goal.
- However, adult learning in England is stagnating – numbers are dropping sharply, including in community learning and part-time HE at Level 4; over 33% of working-age adults are only qualified to Level 2 or below; Level 4/5 skills needs are not being met and starts are declining; the proportion of employees receiving job-related training is at its lowest since the mid-1990s.

- It is time to reboot the lifelong learning offer, and to make sure it is firmly within reach of society's most disadvantaged adults.
- Recommendations include:
  - Invest in community learning where there is unmet need; develop a stronger strategic approach to community learning; simplify funding streams.
  - Reinstate fee grants for: employed 24+ learners who are studying towards their first full Level 2/3 qualification; 19–23 year-old learners who hold full Level 3 qualifications (all funding for Level 3 restricted to qualifications that meet skills needs).
  - Fully fund the pledge to offer people with low digital skills the chance to undertake entry/Level 1 training.
  - Allow students enrolled on accredited higher-value Level 4/5 courses the same student finance system available for 'prescribed' courses.
  - Introduce a 'learning and skills tax rebate' for employers who invest in low-skilled workers.
  - Reinstate tuition fee grants for disadvantaged part-time HE learners who study qualifications that meet skills needs.
  - Improve information flows for part-time HE learning and build a single UCAS application portal for part-time courses.

**Policy Exchange published [The training we need now: Essays on technical training, lifelong learning and apprenticeships in the UK.](#)**

- VET, especially for those not heading to university, has been one of the biggest public policy failures of the last 25 years; emergence from the COVID-19 economic crisis will be an opportunity to do something about it.
  - The essays focus on several different aspects of the problem – the lack of decent apprenticeships for school-leavers, the loss of higher manual and technical skills, and the decline of lifelong learning.
- Authors include Paul Lewis (King's College, London), Alun Francis (Principal, Oldham College), Tim Blackman (Vice Chancellor, The OU), Sir Charlie Mayfield (Chairman, QA Ltd), Euan Blair (CEO, WhiteHat) and Ken Mayhew (Oxford University).

**CESifo published [Are older workers willing to learn?](#)**

- With fears that the ageing population may result in future skill shortages, policies are being considered to help retain older workers in the labour market longer.
  - However, evidence suggests that workers become less productive (relative to their salaries) as they age, or at least that employers believe they do and prefer to hire younger workers.
- To reinvigorate and update older workers' skills and abilities, many countries and international organisations are actively supporting and promoting adult education initiatives.
  - While these may result in more opportunities, they can only be successful if older workers are willing to learn new approaches and techniques.
- Partial retirement legislation in place in Germany 1996–2009 resulted in a sizeable group – of mainly men – who retired earlier than might have been expected in the absence of the reform.
  - Analysis of community learning centre statistics shows that a large proportion of the affected cohorts voluntarily participated in adult education.
  - Most of the learning was on work-related courses teaching skills useful in the labour market, suggesting a strong willingness among older people to acquire new skills and abilities.

**The Centre for European Policy Studies (CEPS) published [Study on mapping opportunities and challenges for micro and small enterprises in offering their employees up- or re-skilling opportunities.](#)**

- Companies with fewer than 50 employees are responsible for 52% of jobs and 39% of EU economic activity.
  - Digitalisation, globalisation, population ageing and the transition to a climate-neutral economy are changing a large share of these jobs and activities, making upskilling and reskilling particularly urgent.
  - Yet employees are currently participating less in adult learning than those in larger firms, rendering both the employees and the companies more vulnerable.

- There is widespread awareness of the importance and wider value of upskilling and reskilling among micro and small companies, but only a minority are taking concrete actions to foster participation.
- There are three approaches: baseline (to comply with legal requirements); conservative (to maintain business relations and market position); forward looking (to build a forward-looking strategy).
  - The first two are most common but are characterised by a short-term vision; the last is adopted by a few, either because they operate in sectors rapidly affected by digitalisation, or because they are themselves strongly innovation-oriented.
- Forward-looking companies place learning at the centre of their business activities and relations and make sure that their employees take advantage of all learning opportunities that arise, with minimum extra investment in terms of financial resources or time.
  - Tracking of employee skills is systematic and structured, even if seldom completely formalised.
  - Upskilling and reskilling rarely happen through formal or non-formal education and training, but mainly informally (intentional but not fully structured or planned), through close collaboration with customers and suppliers; however, it is not as effective as it could be because the activities are random and unstructured and skills assessment is generally underdeveloped.
- Companies face several interrelated challenges: lack of time and financial resources; lack of adequate courses or lack of time to find them; lack of information about available support; fear that low-qualified employees will leave if provided with further qualifications; lack of motivation among low-qualified employees.
- Policy recommendations cover:
  - raising awareness and information about available support and programmes
  - promoting collaborative approaches at sectoral and local/regional level
  - tailoring upskilling and reskilling and relevant public funding to the features of micro and small companies
  - targeting the key actors
  - enhancing skills assessment and identification
  - recognising the value of informal learning.

## THE CHANGING NATURE OF WORK

The RSA's Future Work Centre published [\*A blueprint for good work: Eight ideas for a new social contract.\*](#)

- A new social contract is needed in an age of insecurity caused by:
  - low wages, stagnant productivity and increasing in-work poverty
  - atypical employment arrangements
  - the potential for transformative technologies to further aggravate economic insecurity and inequality
  - the likelihood that COVID-19 will accelerate this dynamic across some industries.
- There are five principles for good work for all:
  - Security – work that provides enough economic security to enable equal participation in society
  - Wellbeing – work that does not harm wellbeing
  - Growth – work that grows and develops capabilities
  - Freedom – work that provides freedom to pursue a larger life
  - Subjective nurture –work that nurtures subjective working identity.
- A number of micro, meso and macro recommendations are made for each of eight ideas advocated under four headings:
  - Stronger worker voice – a union innovation deal; works councils
  - Democratic data – a data covenant for workers; data trusts
  - A modern safety net – a universal basic income; portable benefits
  - Lifelong learning – personal learning accounts; job security centres.

**The International Labour Organization (ILO) published a thematic brief on [Social dialogue and the future of work](#), including a number of short country case studies.**

- Social dialogue is a necessary tool for managing change and addressing the transformations underway in the world of work.
  - It also helps address longstanding problems, such as supporting workers trapped in jobs offering low wages and inadequate social protection.
- A growing number of countries and sectors (both public and private) are developing comprehensive Industry 4.0 strategies for the adoption of new technologies, including by providing accompanying policies that tackle the cost of structural change.
  - Many of these include social dialogue, enabling workers' and employers' organisations to play a key role in anticipating the skills requirements of new occupations and jobs, and facilitate the necessary reskilling and upskilling.
  - Processes of workplace consultation and cooperation, collective bargaining and tripartite social dialogue allow employers and workers to anticipate job losses and, together with governments, take active measures to prepare displaced workers for labour market transitions.
- Social dialogue can be used to improve working conditions for platform workers, to facilitate the resolution of disputes and to secure training opportunities.
  - It can also be used to clarify employment status and to promote compliance with labour regulation, ensuring that employers are competing based on a level playing field.
  - Digital technology can be used to facilitate the organisation of workers and various forms of collective action – the most successful cases of social dialogue have involved well-established trade unions and digital labour platform firms.
- Social dialogue and collective bargaining can play an important role in shaping work and working time arrangements so that these adapt to enterprise needs for flexibility, at the same time as satisfying workers' preferences for control over work schedules.
- Social dialogue can facilitate the transition to a low-carbon economy – social partners have a shared interest in achieving sustainability, the key ingredient in the long-term viability of communities, firms and jobs.
  - Other stakeholders can be engaged in broader civic dialogue, helping to facilitate a just transition.
- Social dialogue can play a key role in the design of policies that lower youth unemployment, increase the employment of older workers and modernise social security systems.
  - Social dialogue and collective bargaining can help to improve the quality of education and vocational training, thus easing the school to work transition.
- There is only so much that can be achieved without public policy support; indeed, political challenges are the single most important factor negatively affecting the effectiveness of social dialogue.

## **EMPLOYMENT: RIGHTS, RESPONSIBILITIES & WAGES**

### **COVID-related**

[April] **The Resolution Foundation published [Risky business: Economic impacts of the coronavirus crisis on different groups of workers](#).**

- Across the two groups where risk appears to be most concentrated – key workers and those with jobs in shutdown sectors – lower-paid people, the young and women stood out.
- Those in the bottom half of the earnings distribution were twice as likely to be key workers and 2.4 times more likely to work in shutdown sectors than to work in jobs that could be done from home.
  - Conversely, those in the top half of earners were twice as likely to be working from home than to be in either of these two groups.
- Employed women were more than twice as likely to be key workers as employed men.
  - Parents were more likely to be key workers than non-parents, and mothers even more so – 39% of working mothers were key workers before the crisis, compared to 27% of the overall working population.
- Workers in shutdown sectors were typically paid £348 a week, compared to £707 a week for those in jobs they could do from home.

- Employed women were more likely than employed men to work in shutdown sectors.
- 16–24 year-olds were twice as likely as the working population as a whole to work in this part of the economy.
- These same workers were least likely to have security in their lives.
  - Almost 75% of those on zero-hours contracts were either key workers or worked in shutdown sectors; while 40% of full-time employees could work from home, less than 25% of those on temporary contracts were able to do so.
  - Private renters – who suffer from the greatest housing insecurity – were 40% more likely to work in shutdown sectors than homeowners.
  - Many parents were likely to have to reduce hours or stop work altogether; over 50% of those born in the early 1980s are parents of children under nine.
  - This is the same cohort who experienced the sharpest deterioration in cohort-on-cohort pay progress in the aftermath of the financial crisis.

[7 April] **The IES published [Homeworker Wellbeing Survey: Interim results](#), a summary of the first 500 responses to an online survey launched in March.**

- 64% were suffering loss of sleep from worry, while between 33% and 60% were suffering from a range of physical symptoms, including joint pains, eye strain, headaches and general fatigue.
  - 75% said their employer had not carried out a health and safety risk assessment of their homeworking arrangements.
- 60% were worried they were taking less exercise; 48% were working long and irregular hours; 33% were eating less healthily; 20% said alcohol consumption had increased.
  - 50% were not happy with their current work-life balance.
- 67% were enjoying the autonomy, while 33% reported feeling isolated.

[15 May] **The CMI published the [findings](#) of a working from home survey of 1,841 members.**

- 87% were homeworking, while 13% were based at their regular workplace.
  - 40% of homeworking managers had childcare responsibilities; 48% had no caring responsibilities.
- Since January 2020, overall workplace happiness has increased among all managers, regardless of whether they are working from home or in the workplace.
- 75% of homeworking managers want to remain working from home in some form post pandemic.
  - 59% wanted to work from home a couple of days a week, rising to 64% of those with children.
  - 21% wanted to get back to their place of work, possibly because they miss the opportunity for social networking and are not happy with the irregular working hours associated with homeworking.

[27 May] **The IFS published [How are mothers and fathers balancing work and family under lockdown?](#), findings from a survey conducted in the first half of May.**

- 4,915 parents living with their children in England were surveyed, covering families with children in eight different school years aged between four and 15.
  - The report focuses on 3,591 opposite-gender, two-parent households.
  - Data were reweighted to ensure representation of such partnerships in England as a whole and by how exposed parents' jobs were to the crisis.
- Among the findings:
  - Parents were on average doing nine hours of childcare and three of housework a day, with paid work taking up just three hours – parents were often doing two activities at a time.
  - Mothers were 1.5 times more likely than fathers to have quit or lost their job, and more likely to have been furloughed.
  - Mothers were doing two fewer hours of paid work than fathers, and two hours more of each of childcare and housework; 47% of their working hours were combined with childcare compared with 30% for fathers.
  - Mothers' rate of paid work was 70% of fathers', down from 80% in 2014/15; mothers were working 68% of the hours that fathers worked (-5ppt); they were interrupted over 50% more often than fathers while working, whereas it used to be the same.

- In households where mothers stopped working for pay, they were doing twice as much childcare and housework; where fathers stopped, these responsibilities were shared equally while the mother continued to work.
- Gaps in time-use remained even where women were the higher earners.
- However, fathers had doubled their childcare hours, which may have a long-lasting impact.

**[4 June] CIPD published [Impact of COVID-19 on working lives](#), findings from an April survey of 1,001 UK workers.**

- 30% said their ability to work had been impacted by a change in caring responsibilities since the outbreak.
- 32% found it difficult to fulfil commitments outside of work due to time spent on their job, compared to 24% in January 2020.
- 22% said it was likely they would lose their job in the next 12 months, compared to just 13% in January 2020; this rose to 38% among furloughed workers.
- 39% thought their financial security had worsened, rising to 57% for furloughed workers.
- 43% said their general mental health had worsened, rising to 52% for those with an existing mental health issue; 35% said their general physical health had got worse.
- 44% were anxious about returning to work, rising to 53% for those with increased caring responsibilities and 62% for those with an underlying health condition.

*CIPD are surveying workers monthly until September 2020.*

## Other research

**CIPD published [Megatrends: Working from home – What’s driving the rise in remote working?](#) at the beginning of April, before the impact of COVID-19 could be considered.**

- The last 20 years have seen a significant increase in the number of people who work exclusively or occasionally from home, reflecting changes in technology, working practices and workforce composition.
  - Homeworking is a major component of flexible working, and helps organisations attract talent, increase diversity and improve employee wellbeing.
- Working mainly from home has increased by 80% in 20 years to reach 5.3% of workers; however, most homeworkers do so only occasionally.
  - 29.6% of people worked from home in the past 12 months, although a further 8.5% of people had the option to do so but did not exercise it.
- Older workers are more likely to be in the ‘mainly work from home’ category, and the increase in numbers is partly driven by the ageing workforce.
- Homeworking is most prevalent in high-skilled professional and managerial occupations, with those in elementary occupations least likely to work from home.
  - In the information and communication industry, more than 50% of workers work from home; in accommodation and food services, it is less than 10%.
- Technology is a huge driver: not only do most jobs involve a computer, but for most jobs the use of a computer is essential; this, combined with a huge increase in household internet access, means that many more people are able to work from home if their jobs allow.
- Increased commuting time is another driver – people who occasionally work from home have a slightly longer journey time than those who don’t; however, it isn’t clear whether longer commutes are leading to working from home, or the ability to work from home is facilitating longer commutes.
- Some jobs are less amenable to homeworking, but the same factors that make homeworking difficult make these jobs hard to offshore.
- Technology can help homeworking, but culture change is needed to embed it; employers should establish new norms, particularly around communication and collaboration.

**CIPD published the [Good Work Index 2020](#), based on its UK Working Lives Survey of over 5,000 workers across different sectors and occupations.**

- The distribution of pay is highly uneven in the UK compared with other developed countries, meaning we have more low-paid jobs than one would reasonably expect.
  - 33% of workers say they are not paid appropriately for the jobs they do, although workers have become slightly more satisfied with pay over the years.
- 60% of workers feel their workload is appropriate, but 33% say it is too much; 40% have little or no autonomy in their work.
- 11% of workers lack the skills needed for their job, while 37% say their skills are underused.
- 73% find their work meaningful in terms of being useful for their organisation, but only 50% believe their work is useful for society.
- Almost 75% think their managers are respectful, fair and/or supportive; weaker areas of people management include fostering teamwork (54% positive), giving useful feedback (53%) and giving recognition (66%).
- There is a concerning level of work-related poor health:
  - 25% of workers report that their job has a negative impact on their mental or physical health.
  - 20% say that they always or often feel exhausted at work and a similar proportion feel under excessive pressure.
  - 10% say they are miserable.

*The survey was conducted just before the COVID-19 pandemic and will be supplemented with further surveys to monitor how UK workers are being affected. A separate [Scotland](#) report was published for the first time, adapting the Index to the Scottish Fair Work Framework.*

**CIPD and Sheffield University published [Supporting working carers: How employers and employees can benefit](#), based on a survey of 970 unpaid carers in employment in England and Wales.**

- Almost 3.7m employees are working carers, 72% in full-time paid work and 32% providing 30+ hours of care a week.
  - 28% (700,000) of those working full time also provide 30+ hours of care.
  - 44% (1.6m) find it difficult to combine their employment and caring responsibilities, particularly if they are female and particularly if they are employed in the voluntary/third and public sectors.
- Most working carers have difficulty concentrating at work because of their caring responsibilities.
  - 36% had refused a job offer or promotion or decided against applying for a job.
  - 30% had reduced their hours of work, 29% were considering reducing their hours and 24% were considering giving up their job.
- 46% had used annual leave to provide care in the previous 12 months and 15% had taken sick leave; 24% had worked in the evening and 23% at weekends to make up hours spent caring.
- 19% were entitled to unpaid care leave and 9% to paid care leave; 25% could use flexitime and 22% were able to work from home some days.
  - Among those with no forms of support, paid care leave was the most favoured, followed by flexitime and the ability to work at home.
- 40% thought their employer was carer-friendly and 39% felt supported when caring responsibilities affected their job; men were more likely than women to hold both views.
- Working carers who believe their employer to be carer-friendly are less likely to: consider reducing their hours or giving up their job; have turned down a promotion; have taken sick leave or unpaid leave to provide care.

**CESifo published [Do generous parental leave policies help top female earners?](#) using longitudinal data from Norway, where paid leave increased from 30 weeks in 1989 to 52 weeks by 1993.**

- The representation of women in top positions has increased only moderately over time, and career profiles of top female earners are significantly different from those of their male counterparts.
  - The reforms did not affect – and possibly decreased – the probability for women to reach the top.
- However, rather than reducing the length of parental leave, there are areas of improvement that would benefit from further research:

- Could paid parental leave systems be designed in a way that prevents the depreciation of human capital that in turn affects wage growth?
- Could technological advances enable flexible working that mitigates the wage penalty suffered by mothers working in professions (e.g. lawyers, business consultants) with nonlinear pay structures?
- How can parental leave policies be designed to encourage fathers to take more leave and thereby share childcare duties more equally?
- Mothers' return to employment can't be seamless if good-quality, affordable childcare isn't available at an early stage and the school day isn't organised with working parents in mind.
- Even in countries with favourable parental leave policies, firms still resist recruiting young women or young mothers and are less likely to promote them – what is their role in shaping family-work balance through parental leave?

**Eurofound published [Challenges and prospects in the EU: Labour market change – Trends and policy approaches towards flexibilisation](#), partly based on European Working Conditions Survey data from 2008 to 2018.**

- Eurofound's work programme documented the major trends and policy developments in the flexibilisation of employment in the years since the financial crisis.
- Key findings include:
  - Retaining workers' attachment to the labour market and, where possible, enhancing skills are important ways to ensure a rapid recovery.
  - Employment growth has been consistently weakest in mid-paid jobs – most noticeably during recessions – and consistently strongest in well-paid jobs.
  - Stability in levels of atypical work is masking a rise in precarious work for certain groups where growing numbers of workers are on 'other' or no contracts.
  - The growth of different types of non-standard contracts is leading to deeper divisions in EU labour markets between well-protected workers and those with limited access to social protection and employment rights.
  - The rise in precarious jobs will require policy solutions to support workers with limited access to social protection and representation – even more relevant in the context of the impact of COVID.

**McKinsey & Company published [Diversity wins: How inclusion matters](#), its third report investigating the business case for inclusion and diversity (I&D), underpinned by a data set encompassing over 1,000 large companies in 15 countries.**

- In 2019, companies in the top quartile of executive gender diversity were 25% more likely to experience above-average profitability than peer companies in the fourth quartile; this is up from 21% in 2017 and 15% in 2014.
  - Companies with more than 30% women on their executive teams were significantly more likely to outperform those with 10–30% women; there is a 48% performance differential between the most and least gender-diverse companies.
- In terms of ethnic and cultural diversity, the companies in the top quartile outperformed those in the lowest by 36%, and there continues to be a higher likelihood of outperformance difference with ethnicity than with gender.
- However, progress has been slow: companies in the original 2014 US and UK dataset increased female representation from 15% to 20% in 2019; across the 2017 global data set, the number increased by just 1ppt to 15% in 2019, and more than 33% still have no female executives.
  - Globally, ethnic minority representation increased by just 2ppt to 14% between 2017 and 2019.
  - There is a widening gap between the most and least diverse companies, resulting in an increased likelihood of a performance penalty for the 'laggards'.
- Two critical factors in successful I&D are a systematic, evidence-based approach and bold action; five key areas of action can be identified among the 'diversity winners':
  - Ensure representation, by advancing diverse talent into senior roles, being thoughtful about who to prioritise and setting the right, data-driven targets.
  - Strengthen leadership accountability and capability, placing core leaders and managers at the heart of I&D.
  - Ensure a level playing field in advancement and opportunity, with fair and transparent criteria.
  - Promote openness and tackle 'microaggressions'.



- Foster belonging through a culture in which all employees feel they can bring their whole selves to work.

## International Comparisons

**Cedefop published a series of country-specific reports on [National policy developments in vocational education and training](#).**

- The reports describe developments since 2015 and are part of a series that provide the background material for analysis of progress towards achieving targets agreed within the process of European cooperation in VET.
  - They are based on information collected from Cedefop's European network of expertise on VET (ReferNet), the directors general for VET and other sources.

*Separate reports cover the UK nations: [Northern Ireland](#), [England](#), [Scotland](#) and [Wales](#).*

**The European Commission published [Mapping the state of graduate tracking policies and practices in the EU Member States and EEA countries](#), the final report of a study covering all EU-27, the UK and EEA member countries.**

- Results aid understanding of what can be done to improve education and training in Europe.
  - Knowing how graduates perceive the relevance of their studies, and what they do after obtaining their qualifications, is key.
- A graduate tracking system will aid education professionals and policymakers in identifying contemporary challenges facing education and training systems across Europe (*see details of a pilot survey below*).
- For example: study abroad experience increases the level of problem-solving skills and an 'activating learning environment', including work experience, provides better preparation for the labour market.
  - Study-related work experience as part of the curriculum reduces the risk of being unemployed or in a lower skilled job by almost 50%.
  - However, less than 50% of survey respondents reported studying in an activating environment.
- Key findings include:
  - About 66% of the 31 countries have system-level graduate tracking in HE and VET; further action is needed to improve graduate tracking measures in all countries.
  - 123 graduate tracking measures were identified at system level across 29 countries.
  - Graduate tracking is generally well-embedded in HEIs across EU and EEA countries, although the quality varies considerably.
  - The countries where graduate tracking is a legal obligation tend to have well-established tracking systems.
  - Additional mapping of graduate tracking practices in member states, the UK, Norway, Iceland and Liechtenstein found that significant effort is still required to reach a comparable graduate tracking system at European level.

*The Higher Education Statistics Agency published [Higher Education Graduate Outcomes Statistics: UK, 2017/18](#) in June, the first annual release of a new graduate tracking survey for the UK; it replaces the *Destinations of Leavers from Higher Education* survey.*

**The European Commission also published [Eurograduate pilot survey: Design and implementation of a pilot European graduate survey](#), conducted between October 2018 and February 2019 in eight countries.**

- The European graduate pilot survey consulted 21,000 bachelor-level and master-level graduates from two graduation cohorts, and tertiary short-cycle graduates, one and five years after graduation in Austria, Croatia, Czechia, Germany, Greece, Malta, Lithuania and Norway.
  - The survey covers sustainable employment, personal skills development and active citizenship.
  - It provides information on the way graduates were taught, their mobility experience and relocation patterns, their self-perceived skills level and how much they use those skills in their jobs.
- **Preparing graduates for the labour market**

- Participation in the labour market Graduates are most satisfied when: they studied in an activating learning environment or were exposed to work-based learning; they have a degree in technology, engineering, natural sciences or health.
- Finding matching jobs Having a job that matches education level and field is mostly influenced by: the labour market of the country; studying STEM-related courses; having study-related work and activating learning experience during studies; having higher educated parents.
- Employment quality and earnings Having satisfactory income is mostly influenced by: the labour market; having a job that matches the qualification; having a master's degree; study-related work experience; gender – female graduates earn less.

#### ■ **Developing high-level skills and competencies for the future**

- What influences skills development at HE? Activating learning environments; study-related work experience; research universities – they prepare graduates better for ICT and advanced numerical skills; applied sciences universities – advantages in social and entrepreneurial skills.
- Skills and competencies required by employers: Field-specific, communication, team working, learning & planning and problem-solving skills were required by at least 66% of employed graduates; foreign language and customer handling skills by about 50% of employers.
- What influences acquisition of high-level competences? Advanced ICT skills are mostly influenced by the field of study and type of institution; exposure to foreign languages and cultures increase problem-solving skills; social background, longer study programmes and studying in a foreign language influence communication skills; teaching field-specific skills with a problem/project based method.

#### ■ **International mobility**

- What are the main causes of mobility? Students were more likely to study abroad if they received support or were studying a foreign language; previous mobility experience doubled the likelihood; the labour market situation in a country is the most important factor in labour mobility; mobile graduates earn around 30% more, even in a lower level job.

#### ■ **Democratic values and engaged citizenship**

- Characteristics of HE are significantly connected with social trust, democratic values, political interest and political participation.

- A European graduate survey could and should be initiated, to address the interests of many Erasmus+ countries in enhancing their graduate tracking capacities.

**UNESCO published [Global Education Monitoring \[GEM\] report, 2020: Inclusion and education – All means all](#), a 439-page document focusing on discrimination on the basis of e.g. gender, wealth, disability, ethnicity, language, migration, sexual orientation and religion.**

- It covers all aspects and stages of learning, including technical, vocational, tertiary and adult education, and skills for work.
- **Technical, vocational, tertiary and adult education:** the GEM target is, by 2030, to ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university.
  - In OECD countries, adults with high skills are three times as likely to participate in training as adults with low skills – 58% vs 20%.
  - In the EU, almost 60% of adults do not participate in adult learning because they see no need for it; cost and inconvenient training schedules or locations are institutional barriers; lack of time and family responsibilities are situational barriers, especially for women.
- **Skills for work:** the GEM target is, by 2030, to substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship.
  - ICT skills are important for work but unequally distributed: the use of basic formulas in spreadsheets, one of nine skills monitored, is possessed by 7% of adults in lower-middle-income countries, 20% in 19 upper-middle-income countries and 40% in high-income countries; there are large disparities by age, gender and wealth.
  - New ICT skills to be monitored in coming years will include the ability to set up effective security measures to protect devices and accounts and to change privacy settings for personal data.

- In Europe, ICT skills are acquired relatively less through workplace training (only 10% of respondents took part in on-the-job ICT training in 2018); skills are developed via free online training and/or self-study, especially among the young.

*The report comments that the COVID-19 crisis has 'exacerbated underlying inequalities' and calls on countries to widen their understanding of inclusive education to include all learners.*

## Government

### NORTHERN IRELAND

**The Department for the Economy (DfE) and the OECD published [OECD Skills Strategy Northern Ireland \(United Kingdom\): Assessment and recommendations](#).**

- Persistent and future challenges remain, many of them rooted in poor governance arrangements: high rates of economic inactivity; a labour productivity rate 17% below the UK average; several large, low value-added sectors; adult skill levels below those of many other OECD countries; employees not using their skills to their full potential.
  - Significant recent progress in skills and economic performance will be partly reversed by COVID-19, making skills policies an essential component of any exit strategy.
- Four priority areas have been identified for improving skills performance:
  - **Reduce skills imbalances:** enhance the provision of career guidance; strengthen the responsiveness and flexibility of tertiary education and VET; reduce economic inactivity to minimise skills shortages; improve labour mobility to meet skills demand.
  - **Create a culture of lifelong learning:** start the development of such a culture early in life; increase adult motivation to learn; remove barriers to adult learning for individuals and employers.
  - **Transform workplaces to make better use of skills:** strengthen management and leadership capabilities; develop engaging and empowering workplaces; strengthen support structures for businesses.
  - **Strengthen the governance of skills policies:** effect sustainable funding arrangements and commitment for an overarching strategy for the skills system; increase coordination and information distribution across the whole of government; improve employer engagement in the governance of skills policies.

**The DfE published [various documents](#) in response to the Migration Advisory Committee's call for evidence on skills shortages, including [details of the supporting qualitative and quantitative information](#).**

### ENGLAND

*[No relevant material sourced for this quarter's release.]*

### SCOTLAND

**[22 June] The Scottish Government published [Towards a robust, resilient wellbeing economy for Scotland](#), the report of a new Advisory Group on Economic Recovery, set up to provide advice in the wake of the pandemic.**

- Inequality, education and unemployment are more dominant themes than ever before, and the 'central importance of the role of education in the reconstruction of the economy is unarguable'.
- 'People and skills' is one of four main challenge areas.
  - Scotland has a highly qualified workforce with a growing proportion of people with high skills, however they were not being fully utilised pre-pandemic, demonstrated by the persistence of low pay, insecure work, underemployment and in-work poverty; these issues will be exacerbated by the virus.
- Recommendations are made under 25 headings, including: learning loss; skills and the labour market; universities and colleges; apprentice training; developing a 'business-led Scottish Jobs Guarantee scheme' to tackle the expected increase in youth unemployment.

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[No relevant material sourced for this quarter's release.]

## REPUBLIC OF IRELAND (RoI)

[No relevant material sourced for this quarter's release.]

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