

Evaluation of the Adult Skills Fund in London: 2024/25

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Executive summary

The 2024/25 academic year marked a year of transition within the adult skills system as the Department for Education replaced the former Adult Education Budget (AEB) with the Adult Skills Fund (ASF) in order to drive greater alignment between skills provision and the needs of employers. Key changes introduced under the ASF included:

- the introduction of Tailored Learning, which combined AEB community learning, formula-funded AEB non-regulated learning (including essential skills), and new, innovative employer facing provision with a key aim to support learners to progress into further learning and employment; and
- changes to the rates at which provision is paid to better reflect ongoing external economic pressures.

Through its delegated authority, **the GLA deviated from national reform in order to offer continuity of provision**, ensuring stability for ASF providers and Londoners, and maintain the ASF's support for the Mayor's Skills Roadmap for London. The aims of the Skills Roadmap were to: support greater collaboration and partnerships, meet the needs of businesses and help Londoners into good jobs, and ensure learning supported progression. GLA deviation from national funding reform included:

- a continuation of formula-funding for non-regulated essential skills provision, with the aim of preserving access to foundational learning for Londoners furthest from the labour market; and
- targeting the 15% London Factor uplift to provision fundamental to achieving the aims of the Mayor's Skills Roadmap for London, including essential skills provision which, in part, aimed to foster the progression of learning.

Evaluation identified the successes of these measures in maintaining access to important foundational learning. Despite funding reform, which resulted in higher funding rates for several learning aims, and persistent external economic challenges, which have not been met with a proportionate increase in funding from DfE, London's ASF maintained a high number of enrolments in 2024/25. Notably:

- the ASF achieved record engagement from Londoners most likely to be negatively impacted by skills disparities;
- providers spoke positively of the GLA's approach to implementing funding reform; and
- there was increasing alignment between the ASF and London's priority sectors (health and social care, hospitality, construction, digital and creative).

Despite these successes, reflecting decline nationally, ASF participation fell by 5%. In attempt to minimise this, **the GLA spent beyond its ASF allocation for the second consecutive year**. While this demonstrates the demand for and importance of the ASF in London, this overspend is unsustainable and evidences the need for further investment from central government, to safeguard the ASF's contribution to important social outcomes and inclusive growth.

Further, while the ASF engaged a diverse range of learners, learner demographics varied by provision type. In particular, across the ASF, learners aged 19-23 and 50+ make up 40% of all learners however make up fewer than one-third of learners on JSfL provision. These groups are a key focus of ongoing strategy to reduce economic inactivity and unemployment. Therefore, **it is vital that there is a clear, targeted strategy to ensure Londoners aged 19-23 and 50+ engage in the ASF.**

In 2024/25 **London's ASF demonstrated effective pathways into higher level learning and employment** in London's key priority sectors, evidencing strong support for Mayoral strategic priorities. Notably:

- enrolments on essential skills provision accounted for over half of enrolments on provision up to Level 2 for the first time since delegation. Increases across skills have not been equal, however, with both English and maths falling to their lowest proportion of enrolments up to Level 2 since delegation;
- higher level learning grew to its largest proportion of ASF enrolments in London since delegation, demonstrating the GLA's commitment to ensuring Londoners are equipped to enter the city's high-skilled labour market; however, providers described multiple Level 3 funding pots as complex; and
- as learning levels increased, enrolments became increasingly aligned to London's priority sectors, with over half of higher-level learning aligning to priority areas.

Reflecting this evidence, and the importance of both essential skills and higher-level provision in London's labour market, we propose the following recommendations to ensure providers are able to effectively deliver the most appropriate provision to Londoners:

- **Encourage providers to maintain good levels of English, maths and digital provision** to ensure the ASF continues to equip Londoners with foundational skills required to navigate daily life and access higher-level provision.
- **Deliver a simplified, more coherent Level 3 offer** to enable providers to drive greater alignment between higher-level skills and local labour markets.

Reflecting this pathway into higher level education and employment, **learner outcomes varied across levels:**

- generally, learners across all levels of provision reported positive social outcomes; however, improved confidence and wellbeing were highest among those on lower-level provision, while higher-level provision resulted in more volunteering outcomes;
- the proportion of learners reporting positive economic outcomes increased with learning level.

Interviews with providers and learners provided **rich evidence on the personal and social outcomes of learning**, particularly in relation to important foundational skills required to navigate everyday life. Additionally, learners engaged in higher-level learning shared their **improved awareness of the career opportunities available to them.**

2024/25 marked the second year of the three-year Jobs and Skills for Londoners (JSfL) programme, introduced as a direct response to multiple pressures impacting economic activity in London. The programme aimed to support 'good work' outcomes in London's priority sectors, defined as employment expected to last at least four weeks at a minimum of 16 hours per week, pay at least the London Living Wage, and that does not use zero-hour contracts. Across its first two years:

- around half of enrolments on JSfL provision were in London's priority sectors, demonstrating good alignment between the provision offered and London's skills needs. Health accounted for the largest priority area, accounting for 23% of all JSfL enrolments, while green represented the smallest, at 4%. Despite this success, no priority sectors achieved their enrolment targets; and
- around half of learners who took part in JSfL provision reported positive economic outcomes. Of these, 53% reported they had moved into employment, demonstrating the programme's success at providing skills for jobs. Additionally, almost all learners reported positive social outcomes.

Evaluation evidence identified that providers experienced challenges in supporting 'good work' outcomes in sectors such as hospitality and health and social care due to the prevalence of low-pay, temporary contracts in these sectors. Additionally, **the first two years of the programme ran alongside an increasingly challenging economic climate**, characterised by rising unemployment and a reduced number of vacancies, further limiting the programme's ability to contribute to good work outcomes.

Resulting from the challenges reported by providers in achieving good work outcomes, the evaluation recommends the GLA should **consider ways to improve job outcomes on the JSfL programme through funding policy changes, and additional support and guidance for providers.**

1 Introduction

In August 2025, the Institute for Employment Studies (IES) was commissioned by the Greater London Authority (GLA) to undertake an evaluation of the 2024/25 and 2025/26 academic years of the Adult Skills Fund (ASF). This report presents findings from the evaluation of the 2024/25 academic year.

1.1 Overview of the Adult Skills Fund

The ASF, formerly the Adult Education Budget (AEB),¹ funds a variety of education and training provision for adults aged 19 and above. Through a range of qualification and non-qualification provision, including essential skills (English, maths, ESOL and digital), learners' legal entitlements,² and Tailored Learning, the ASF aims to provide learners with skills for life and work, and build inclusive communities.

Since the 2019/20 academic year responsibility for London's share of the ASF has been delegated to the Mayor, with a key aim to drive alignment between skills, the needs of Londoners, and regional priorities. At over £300 million, the ASF is the Mayor of London's single largest area of expenditure.³

During the 2022/23 and 2024/25 academic years, the ASF in London was underpinned by the Mayor's Skills Roadmap for London. The Skills Roadmap sought to support greater collaboration and partnerships, meet the needs of businesses and help Londoners into good jobs, and ensure learning supported progression. To respond to these objectives the core funding models of the ASF, ASF Core and Tailored Learning, aimed to support different outcomes among learners.

ASF Core spans a range of accredited, formula-funded provision from Entry Level through to Level 3 and above. This regulated provision aims to offer a pathway from lower level to higher-level provision to support Londoners to develop the skills they need for work and to progress in education.

Tailored Learning offers opportunities to reintroduce Londoners to education ranging from non-regulated, informal provision to non-regulated, Level 2 provision. Recognising the persistent skills disparities, lower labour market participation and poorer outcomes among

¹ The Adult Education Budget became the Adult Skills Fund in August 2024. This evaluation references data across both funding periods. For consistency, adult skills funding is referred to as the ASF throughout this report.

² Legal entitlements include: Level 2 English and/or maths for those who do not already have a L2; Level 1 Digital Skills for those assessed at below Level 1; a first Level 2 or 3 qualification for those aged 19–23 who do not already have a qualification at this level.

³ [The Adult Skills Fund in London](#) | Robering, 2024

Londoners from underserved communities, Tailored Learning aims to drive important social outcomes, such as increased confidence, motivation and wellbeing, and support progression into higher level accredited provision. This aims to deliver the Mayor's ambition to ensure every Londoner has the skills they need to progress in education, employment and their personal lives.

To engage people from ethnic minority backgrounds, parents, and learners with special educational needs and/or disabilities, Tailored Learning provision is often delivered in partnership with community organisations, in community venues that are familiar to learners.

1.2 Overview of the evaluation

This report brings together a range of primary and secondary evidence, and considers how the ASF has changed since delegation and the extent to which it is supporting Mayoral strategic priorities.

- A survey of ASF providers, completed by 59 of the 113 providers (52%) in receipt of grant and procured funding to deliver provision in London. This survey captured providers' views on: how they engage learners; how they work with employers and community partners to design and deliver provision; their views on the GLA's management of the ASF; how they responded to the 2024/25 funding reform; and how they align their provision with Mayoral strategic priorities.
- 21 in-depth interviews with ASF providers, including a range of Further Education (FE) Colleges, Local Authorities, Institutes of Adult Learning, and Independent Training Providers. Interviews explored their experiences of managing and delivering the ASF, how they work with the GLA, employers, community partners and other ASF providers, and the outcomes they support learners to achieve.
- 4 provider case studies comprised of an interview with a senior manager, interviews or a focus group with delivery staff, and a learner focus group. Case studies offered detailed insight into how the ASF is supporting specific GLA priorities, and included an exploration of essential skills courses and courses delivered in partnership with employers in priority sectors.
- 6 interviews with learners who took part in ASF provision in the 2024/25 academic year, exploring their motivations for engaging in adult learning, their experiences of their course(s), and the outcomes the ASF supported them to achieve.
- 6 interviews with wider stakeholders involved in the ASF, primarily including Adult Education Representatives. These interviews explored providers' preparedness for the 2024/25 funding reform, any unintended consequences, and the appropriateness and effectiveness of the GLA's ASF flexibilities.
- 5 interviews with employers involved in the design and delivery of ASF provision, exploring how they became involved in the ASF, how they worked with providers and the benefits this has had for their organisation.
- Synthesis of wider policy, data and research, including GLA analysis of ILR data, offering comparisons between the ASF in London and other Mayoral Strategic

Authorities (MSAs), and insight into how the ASF is meeting the needs of Londoners in the current political and economic environment.

1.3 Structure of this report

As provision has different aims at different levels, this report explores the performance of the ASF against Mayoral strategic priorities by level of provision. The structure of this report is as follows:

- **Chapter 2 – Adult skills in a changing labour market:** This chapter explores the changes within the adult skills and the employment support landscape at both a national and London level leading up to the funding reform introduced in the 2024/25 academic year.
- **Chapter 3 – Who took part in the ASF:** This chapter provides an overview of who took part in the ASF in London in 2024/25, with comparisons to previous academic years demonstrating how the delegated ASF has changed over time. This chapter also explores how engagement differs between funding models.
- **Chapter 4 – Funding and accountability reform:** This chapter provides an overview of the funding and accountability reform introduced in the 2024/25 academic year, including how the GLA deviated from national reform and the effects of reform on providers' operations.
- **Chapters 5–7:** These chapters present discussion on essential skills up to Level 2, provision at Level 3 and above, and the Jobs and Skills for Londoners programme. Each chapter includes information on who engages with the respective provision, which courses learners enrolled on, the outcomes they achieved, and how this responds to Mayoral strategic objectives.
- **Chapter 8 – Conclusions:** This chapter sets out the conclusions from this evaluation, and the recommendations for the ASF going forward.

2 Evolution of the adult skills landscape

The ASF plays a vital role in supporting a range of social and economic outcomes among learners, including social integration and wellbeing, as well as progression into education and employment. To maximise these benefits, policy and funding reforms over recent years have focused on driving greater alignment and integration between skills and employment systems to better meet the needs of employers and individuals.

The most recent Employer Skills Survey (ESS), conducted in 2024, found that one-quarter of job vacancies in London were hard to fill due to skills shortages. This was higher than observed in other urban MSAs, for example the West Midlands Combined Authority (23%) and Liverpool City Region (20%).⁴ Despite this, London's unemployment rate remains higher than that seen nationally at 7.6%, compared to 5.2% in February 2026.

This chapter provides an overview of key policy developments both nationally and in London to contextualise the GLA's ASF.

2.1 The Adult Skills Fund

The Skills for Jobs White Paper, published in 2021, signalled the change in direction within England's skills system to ensure people have the skills needed to support growth industries and boost productivity. This change sought to put employers at the centre of the skills system, and to make sure people can access education and training across their life course. The White Paper acknowledged the key role of adult education funding in delivering these strategic objectives and that funding models were complex and required simplification.

The White Paper therefore laid the ground for the introduction of the ASF, which replaced the AEB in August 2024, to help deliver this change. The ASF aimed to simplify how funds were allocated to providers, and increase providers' flexibility to respond to local needs.

Coinciding with the launch of the ASF was the introduction of Skills England, a new government executive agency designed to be the single voice on current and future skills needs. Skills England, similar to the ASF, was introduced to support greater alignment between the skills that employers need, and the skills education providers offer.

The ASF introduced Tailored Learning, which combined AEB community learning, formula-funded AEB non-regulated learning, and new, innovative employer facing provision. Additionally, the rates at which regulated formula-funded qualifications are paid

⁴ [Employer Skills Survey 2024](#) | Department for Education

was changed to reflect higher delivery costs resulting from external economic pressures, and to ensure providers continue to deliver high-quality skills provision. Through this, the majority of courses received an uplift.

Many aspects of the reforms aligned to Mayoral priorities and were adopted by the GLA. However, some adaptations were made to better meet the needs of Londoners. These included:

- A continuation of formula-funding for non-regulated essential skills provision (including English, Maths, ESOL and digital), minimising risk to the availability of this provision to ensure those furthest from the labour market, in diverse communities, can access learning; and
- Offering a more targeted London Factor (detailed in Chapter 5) to provide an uplift in funding to essential skills provision, legal entitlements and licenses to practice, reflecting the increased cost of delivery in London and the importance of these qualifications.

2.2 The context of the 2024/25 academic year

Economic growth in the UK throughout the 2024/25 academic year weakened on previous quarters. At the start of the academic year, the UK's employment rate remained lower than in the three-months prior to the Covid-19 pandemic, while economic inactivity remained persistently high.

In recognition of these challenges, as well as the mismatch between skills supply and demand and the rapidly changing role of technology at work, the UK Government published both the Get Britain Working White Paper and Industrial Strategy in November 2024 and June 2025, respectively. Each seeks to drive greater alignment of skills and work. In particular, the National Industrial Strategy identified eight sectors core to the UK's growth which will be a focus of ongoing skills and employment policy, while the Get Britain Working White Paper outlined the UK's ambition for an 80% employment rate. To achieve this, the paper introduced 16 'trailblazers' targeting youth unemployment and economic inactivity. The trailblazers, five of which are being delivered in London, aim to lead a systems change approach to skills and employment support by encouraging join-up with health, housing and other vital services.

2.2.1 London's policy response

In addition to changing policy and priorities at a national level, the GLA has also developed its own priorities tailored toward London's unique context. Importantly for this evaluation, the Skills Roadmap for London guided London's skills priorities throughout the 2022–24 Mayoral term, and sought to achieve three key aims: drive greater collaboration and partnerships; meet the needs of businesses and help Londoners into good jobs; and deliver learning that supports progression.

The Skills Roadmap was supported by the London Local Skills Improvement Plan (LSIP), published in 2023 by Business LDN. The LSIP explores the challenges presented to

London's businesses as a result of the city's complex labour market, skills gaps and inequalities, and presents key recommendations to the GLA, adult skills providers and employers to drive inclusive growth.

Together, these strategies guided delivery of the ASF in the 2024/25 academic year and guided providers to support Londoners from diverse and underserved backgrounds to develop skills relevant to the needs of employers. Across the Skills Roadmap and the LSIP, five priority sectors in London were identified. These were: health and social care, hospitality, construction, digital, and the creative industries.

The 2024/25 academic year saw the introduction of the London Growth Plan, a refreshed strategy to drive growth in London. The plan sets out four ambitions for the 10-years to 2035, including: raising average productivity growth rates to 2%; raising real household weekly incomes of the lowest 20% of earners in London by 20%; accelerating London's progress toward net zero; and expanding London's services exports by an average of 6% each year. A key contributor to this plan is the Inclusive Talent Strategy (ITS), which was published in October 2025 and replaces the Skills Roadmap. The ITS centres on three key areas of action: putting employers at the centre of driving inclusive growth; ensuring Londoners can find the right training and career path for them; and tackling the barriers to retaining talent.

In addition to these strategies the GLA has developed the Get London Working plan, a direct response to the Get Britain Working White Paper which describes a regional approach to achieving an 80% employment rate in the capital. The plan sets out a whole system approach to meeting this objective, and outlines how it complements the Growth Plan and ITS. Together, these three strategies will underpin the development of London's residents, employers and economy to support a prosperous, healthy population.

3 Who took part in the Adult Skills Fund?

This chapter provides an overview of spend on different types of provision and who took part in the ASF in the 2024/25 academic year, before providing insight into what courses learners enrolled in. Where possible, commentary is provided on key changes across these areas against the previous academic year, prior to funding reform and since delegation in 2019/20.

Chapter summary

- **In 2024/25, participation in the ASF fell by 5% in London**, reflecting the rate of decrease in adult skills provision seen nationally. This decrease is largely a result of higher funding rates introduced by funding reform, as well as persistent external economic challenges that have not been met with a proportionate increase in funding allocation from DfE.
- **The ASF achieved record engagement from Londoners who are more likely to be negatively affected by skills disparities**. Notably, over three-fifths of learners (62%) were from ethnic minority backgrounds, and nearly one-third (29%) were aged 50+.
- **There was increasing alignment between the ASF and London's priority sectors**. Nearly one-third (29%) of enrolments were in an SSA aligned to London's priority sectors, up from around one-quarter in 2019/20. Preparation for Life and Work remained the largest SSA, accounting for over half (53%) of enrolments.
- **Almost all learners (95%) reported positive social outcomes following engagement**. This was stable across funding models, demonstrating the important positive influence of engagement in adult skills provision.
- **Just below half (44%) of learners reported a positive economic outcome**. Reflecting the different aims of the two core funding models, economic outcomes were more common among learners who engaged in ASF Core provision (45%) than those who took part in Tailored Learning (40%).
- **The GLA spent 101% of its total funding allocation**. In the 2024/25 academic year, the GLA exceeded its total allocation by £4m. This demonstrates the success and importance of the ASF in London, however, raises concern about the long-term sustainability of the ASF's ability to support important social outcomes and drive inclusive growth.

3.1 Participation

Nationally, participation in ASF provision fell by 5% in the 2024/25 academic year. Mirroring this, ASF participation in London fell by 5% to 211,700 learners, down from 22,820 in the previous academic year.

These decreases, both nationally and in London, can largely be attributed to higher funding rates, introduced as part of the national funding reforms to better reflect the cost of delivery, which have not been met with an increase in overall funding in line with inflation from central government. These pressures are increased among providers in

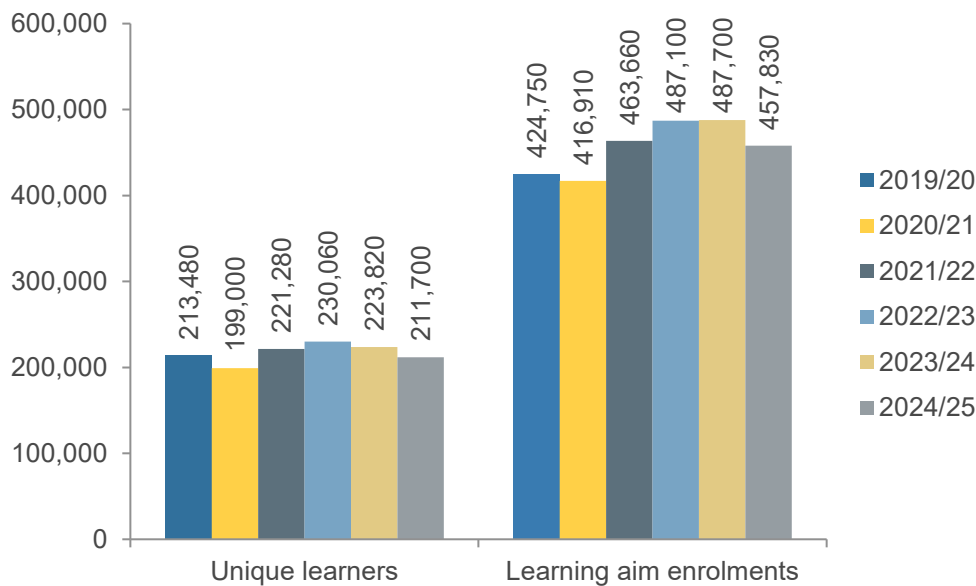
London as funding stagnation is exacerbated by higher overheads and staffing costs associated with delivery in the city.

Tighter budgets have also caused providers in London to reduce the scale of their pastoral support to learners, which for many was a key enabler to their engagement.⁵ The Participation in Adult Learning survey indicates that individuals from lower-income households are consistently less likely to engage in adult learning,⁶ many of whom may be unable to engage without financial and pastoral support. Additionally, the survey found that cost was the third most commonly reported barrier to engaging in adult learning, further driving down enrolments.⁷

Reflecting an overall decrease in ASF participation, the total number of learning aim enrolments fell to 458,000 enrolments in 2024/25, down from 487,000 in the previous academic year. This is lowest number of enrolments in London since 2020/21.

Figure 3-1 outlines the number of unique learners that engaged with the ASF and learning aim enrolments each year since delegation.

Figure 3-1: Total number of unique learners engaged in the ASF and learning aim enrolments in London each year since delegation



Source: ILR 2019/20 R14; 2020/21 R14; 2021/22 R14; 2022/23 R14; 2023/24 R14; 2024/25 R14

These challenges are also reflected in planned and actual delivery figures shared by providers with the GLA through their annual delivery planning process. In planning for the 2024/25 academic year, grant funded providers anticipated engaging over 203,000

⁵ [The Rising Cost of Living and Access to Adult Education in London](#) | Learning and Work Institute

⁶ [Participation rates](#) | Learning and Work Institute

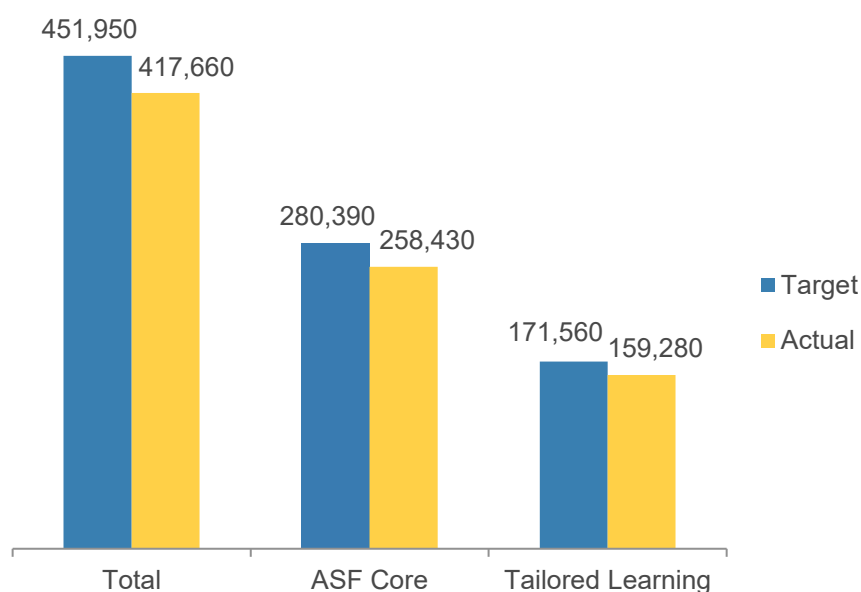
⁷ [The workforce learning slowdown?](#) | Learning and Work Institute

learners in ASF provision. However, data shared at the end of the academic year shows that around 185,000 learners engaged in provision, a shortfall of around 9%.^{8,9,10} Notably:

- the ASF planned to engage around 99,000 unemployed learners in 2024/25 but engaged a total of 74,000 unemployed learners;
- around 500 fewer 19-23-year-olds, and 600 fewer Londoners with learning difficulties, disabilities or health conditions engaged than planned; and
- there were an additional 8,000 enrolments among learners from ethnic minority backgrounds than anticipated.

Similarly, providers' delivery plans anticipated over 450,000 unique learning aim enrolments across the GLA's ASF. However, data supplied by providers at the end of the academic year indicates that there were around 418,000 unique learning aim enrolments, a shortfall of 32,000 enrolments. As displayed in Figure 3-2, these shortfalls were recorded across both ASF Core and Tailored Learning provision at similar proportions.

Figure 3-2: Planned vs. actual learning aim enrolments in the 2024/25 academic year^{8,9,10}



Source: GLA analysis of ASF provider 2024/25 delivery plans and actual delivery statements

⁸ As JSfL providers are not required to share delivery plans in the same way as grant funded providers, these figures are limited to enrolments at grant funded providers only. Therefore, these figures do not include learners who engaged in JSfL provision.

⁹ A small number of Tailored Learning aims were delivered by JSfL providers, and subsequently are not captured in these figures.

¹⁰ Note: One provider did not submit full breakdowns in their delivery plans and have been excluded from these figures.

3.2 Learner demographics

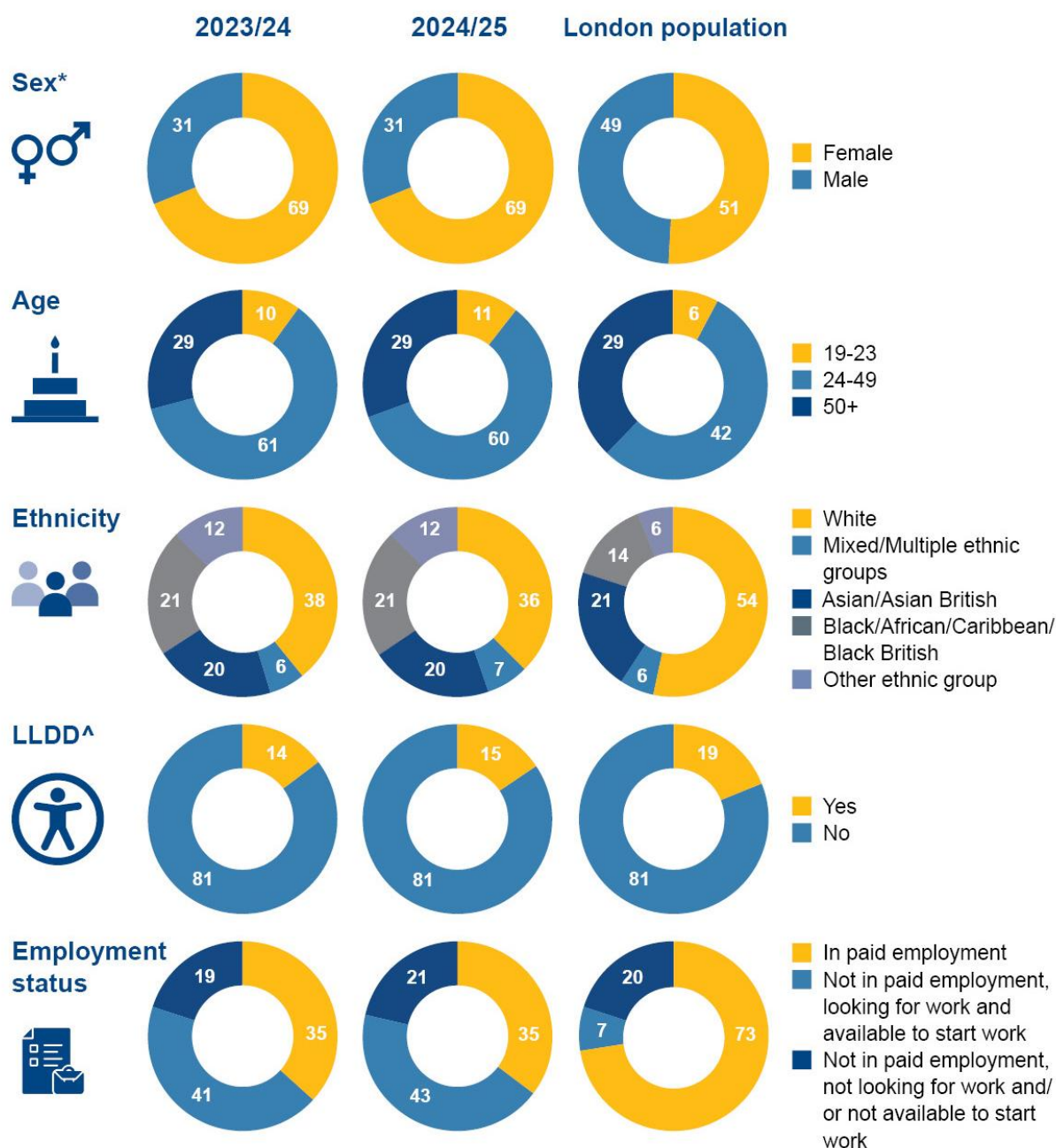
A key ambition of the Skills Roadmap was to improve labour market outcomes among learners who experience disadvantage in the labour market, by supporting greater uptake of ASF provision. This included older Londoners and individuals with health conditions and/or disabilities, who are more likely to be economically inactive, and those from ethnic minority backgrounds and with learning differences, who have lower participation rates, lower pay and fewer progression opportunities.

In 2024/25, London's ASF continued to engage a diverse range of learners, consistent with trends over previous years, demonstrating a strong contribution to Mayoral priorities. Notably, this year London's ASF achieved its highest rates of participation among:

- people aged 50+, who made up nearly one-third (29%) of learners;
- individuals from ethnic minority backgrounds, who accounted for three-fifths (60%) of all learners;
- people identifying as having either a learning difficulty, disability or health condition, who represented 15% of learners; and
- those who were not in paid work, not looking for work and/or not available to start work, who made up over one-fifth (23%) of learners. This is an increase on the previous academic year, demonstrating increasing alignment to policy priorities to reach economically inactive people.

Figure 3-3 presents the demographics of learners who participated in the 2023/24 and 2024/25 academic years, and how this compares to London's population.

Figure 3-3: Demographics of learners who engaged in ASF provision in 2023/24 and 2024/25, compared to the whole population in London



* Based on self-declaration by the learner of 'legal sex'

^ Based on self-declaration by the learner

Source: ILR 2023/24 R14; 2024/25 R14; ONS Census 2021

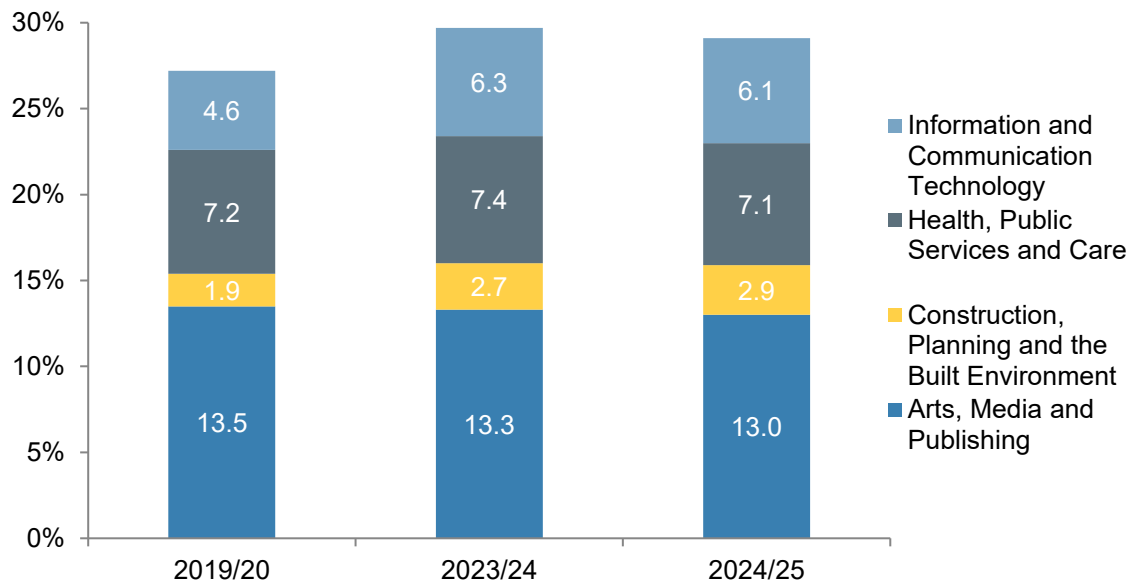
3.3 What courses are learners enrolling in?

In 2024/25, Preparation for Life and Work remained the largest Sector Subject Area (SSA) accounting for over half (53%) of enrolments. However, when exploring how

enrolments across SSAs have changed since delegation, there is some indication that an increasing proportion of courses being taken are aligned with GLA priority sectors.¹¹

Figure 3-4 shows that broadly, enrolments in SSAs aligned to GLA priority sectors in 2024/25 remained similar to the previous academic year, accounting for around 29% of enrolments. This was largely comprised of enrolments in Arts, Media and Publishing courses which accounted for 13% of all enrolments in 2024/25.

Figure 3-4: Proportion of enrolments aligned with GLA priority sectors



Source: ILR 2019/20 R14; 2023/24 R14; 2024/25 R14

3.4 Outcomes

The London Learner Survey (LLS) was introduced in the 2021/22 academic year with a key aim to expand insights into the outcomes achieved by adult learners to better inform policy development. Where an individual provider achieves a 50% response rate to the LLS they receive aggregated provider-level responses, offering them insight into the outcomes achieved specifically by their learners. Providers have reported using this data to:

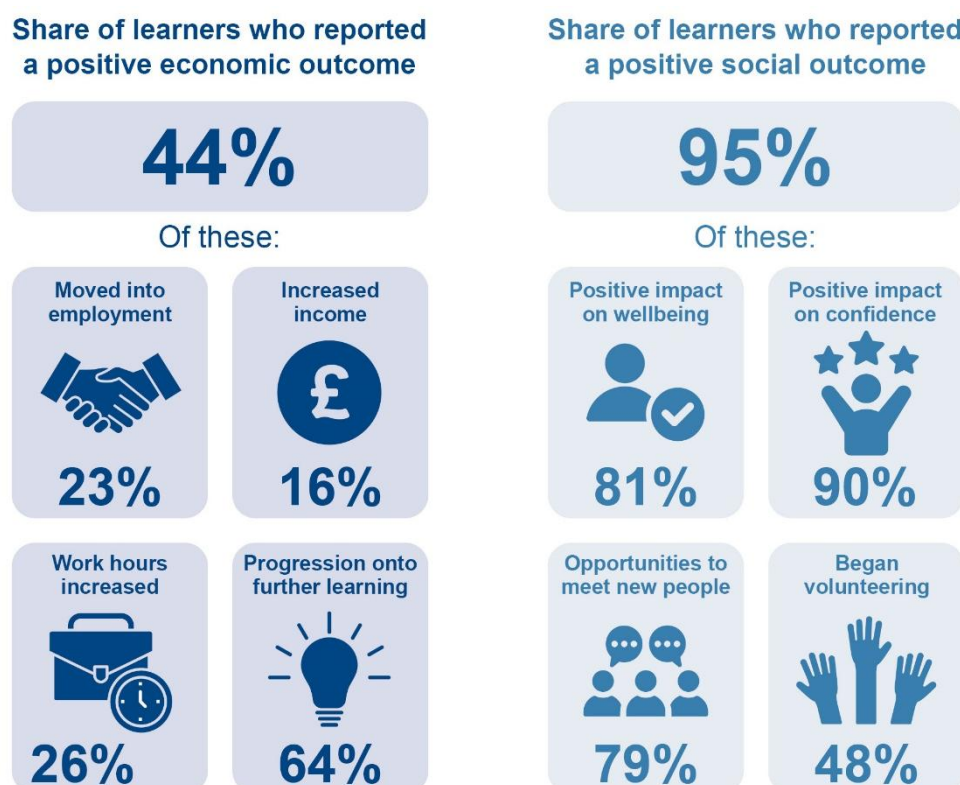
- support curriculum planning;
- support conversations with local councillors;
- report to Ofsted;
- complete self-assessment exercises;

¹¹ GLA priority sectors in the 2024/25 academic year included; construction, creative industries, digital and technology, health and social care and hospitality

- enable annual impact reporting;
- support internal reporting to senior leads; and
- market provision to new learners.

Figure 3-5 outlines the outcomes achieved by learners in the 2024/25 academic year.

Figure 3-5: Outcomes reported by ASF learners following their engagement in ASF provision in the 2024/25 academic year

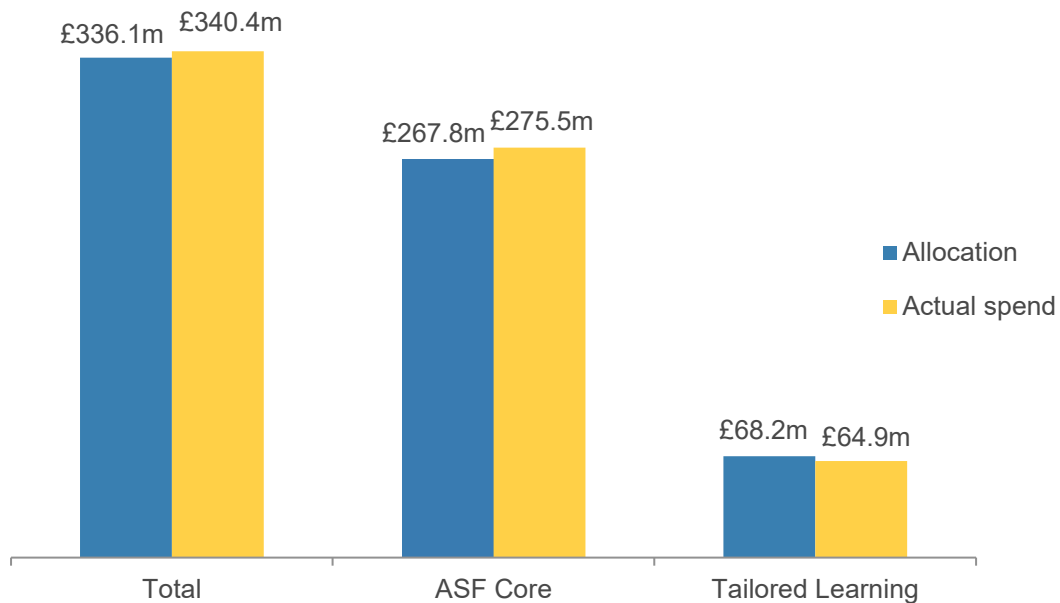


Source: London Learner Survey, 2024/25

3.5 Funding and reconciliation

For the second consecutive year the total paid by the GLA to providers for ASF delivery was higher than its allocation from DfE. GLA reconciled financial statements show that London's ASF delivered 101% of its £336.1m allocation with an overspend of £4.3m. Figure 3-6 outlines funding allocation and actual spend by funding model, and shows that:

- over-delivery was driven by a £7.6m overspend on ASF Core provision, 103% of its total allocation; and
- Tailored Learning allocations were underspent by £3.3m, reaching 95% of their allocation.

Figure 3-6: GLA ASF funding allocation vs. actual spend in the 2024/25 academic year

Source: GLA ASF reconciled financial statements, 2024/25

Over delivery for a second year demonstrates the success of initiatives driving the Mayor's ambitions set out in the Skills Roadmap, such as increasing the accessibility of adult skills through investment in both physical and digital learning environments. It is also indicative of the demand among Londoners for adult skills courses. However, echoing earlier commentary in this chapter, overspend at this level emphasises the increased economic pressures providers faced in 2024/25, driven by the cost-of-living crisis and the COVID-19 pandemic among other factors, which are exacerbated by higher costs of delivery in London.

While it is positive that the GLA has been able to support providers, this level of overspend is not sustainable for the GLA without an increase in funding from central government. Maintaining current funding levels would likely weaken the London ASF's ability to support important social outcomes and drive inclusive growth.

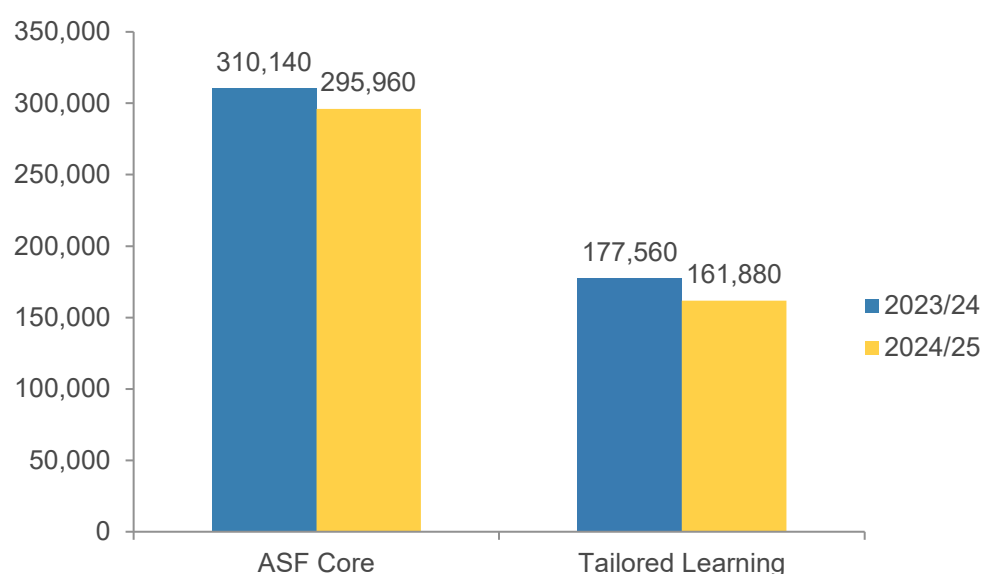
3.6 Comparisons by funding model

As a result of funding reform in the 2024/25 academic year, some courses are classified differently than in previous years. To maintain comparability between funding years, GLA analysis applied the 2024/25 funding rules to 2023/24 data. This data is used throughout this section to offer comparison.

Reflecting the different aims of the ASF's two funding models, ASF Core and Tailored Learning, the learner profile and the courses learners engage in vary between them. Figure 3-7 displays the number of learning aim enrolments in the ASF by funding model in 2023/24 and 2024/25, and shows that:

- engagement in both funding models decreased in 2024/25, reflecting the overall decrease in ASF enrolments;
- with over 295,000 enrolments, ASF Core accounted for around two-thirds (65%) of all ASF enrolments. This is the lowest number of enrolments through this funding model since delegation of the ASF, and a decrease of around 5% on the previous year; and
- at just below 162,000 enrolments, Tailored Learning saw a 9% decrease in enrolments in the 2024/25 academic year, down from 177,560 enrolments in 2023/24. This accounted for 35% of all ASF enrolments in 2024/25.

Figure 3-7: Number of learning aim enrolments by funding model in 2023/24 and 2024/25



*To provide accurate comparability, GLA analysis applied 2024/25 funding rules to 2023/24 enrolments.
Source: ILR 2023/24 R14; 2024/25 R14*

3.6.1 Learner demographics by funding model

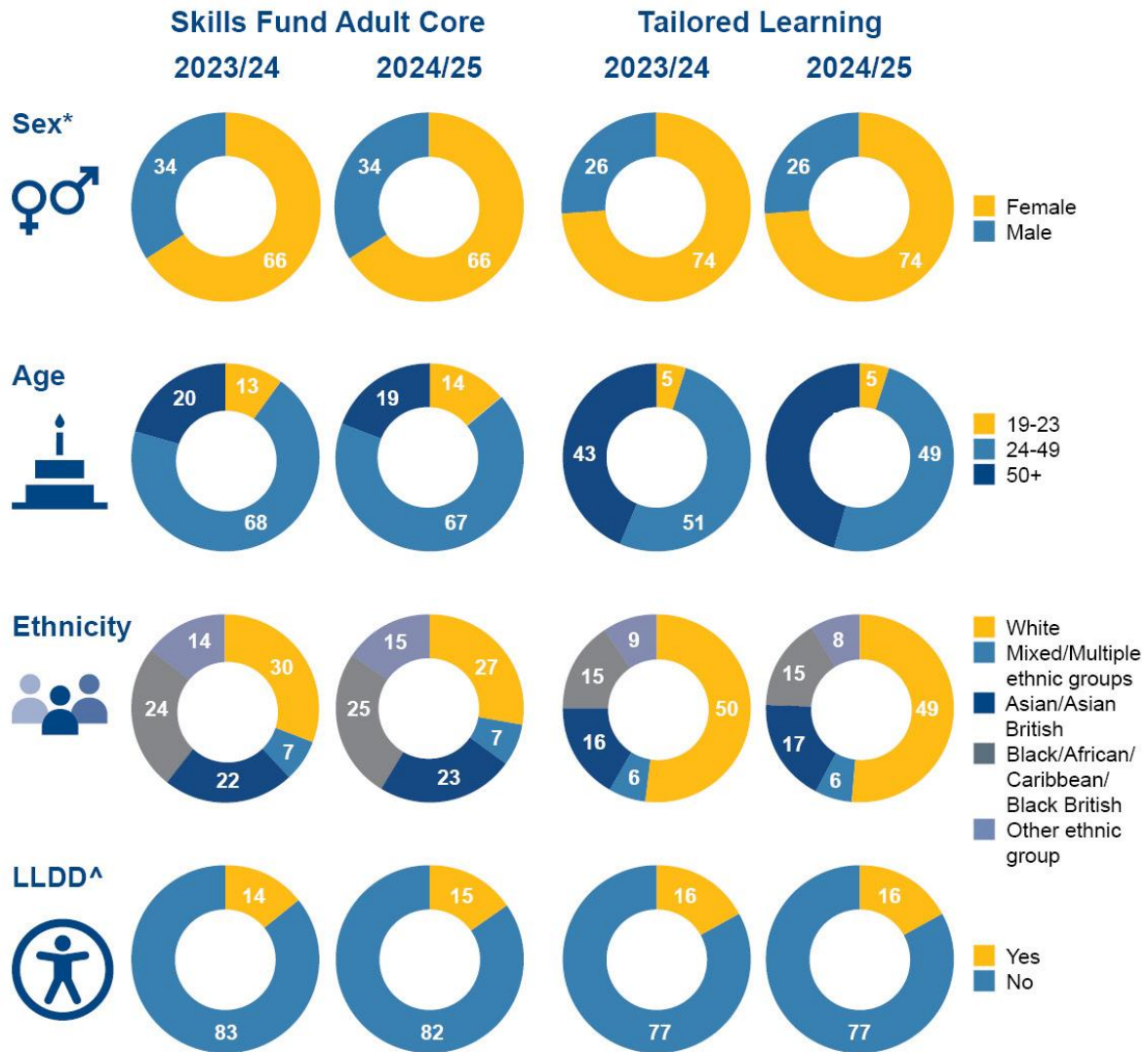
The Skills Roadmap set out London's plan to improve skills among the most underserved communities, including those who experience persistent inequalities in education and the labour market. Recognising the importance of pathways to accredited and higher-level provision among these groups, Tailored Learning aimed to engage learners from underserved communities, while ASF Core aimed to progress these learners through higher levels and into employment.

In 2024/25, Tailored Learning demonstrated effectiveness in engaging some priority groups, including females and older Londoners. Interestingly, Tailored Learning appears to have been less effective than ASF Core at engaging learners from ethnic minority backgrounds, despite the fact that overall participation in the ASF is higher among people from ethnic minority backgrounds. Figure 3-8 outlines the demographics of learners by funding model, and shows:

- a higher proportion of learners who participated in Tailored Learning were female than observed in ASF Core (74%, compared to 66%);

- a considerably larger proportion of participation in Tailored Learning was among learners aged 50+ than observed in ASF Core provision (45%, compared to 19%); and
- ASF Core had higher participation among learners from ethnic minority backgrounds than Tailored Learning (70%, compared to 46%).

Figure 3-8: Learner demographics by funding model, 2023/24 and 2024/25



* Based on self-declaration by the learner of 'legal sex'

^ Based on self-declaration by the learner

To provide accurate comparability, GLA analysis applied 2024/25 funding rules to 2023/24 enrolments.

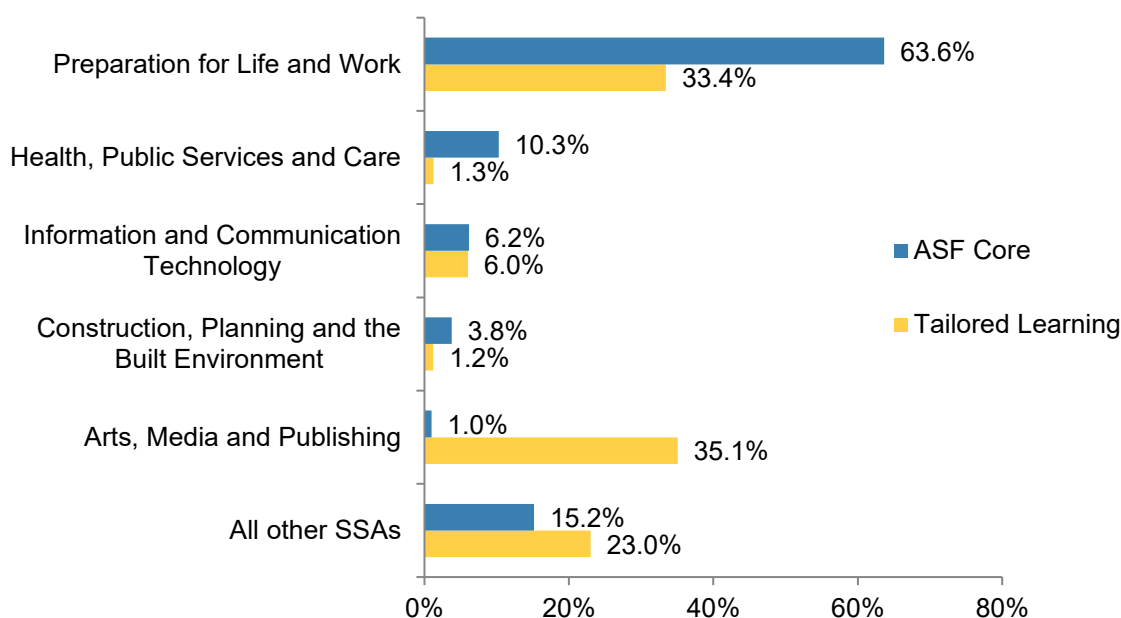
Source: ILR 2023/24 R14; 2024/25 R14

3.6.2 Sector Subject Area by funding model

Reflecting the varied aims of each funding model, enrolments by SSA varied across ASF Core and Tailored Learning.¹² Figure 3-9 provides an overview of enrolments by SSA across each funding model and shows:

- Nearly two-thirds (64%) of ASF Core enrolments were in a single SSA, Preparation for Life and Work, indicating the substantial contribution of ASF Core in developing essential skills among learners;
- A similar proportion (68%) of Tailored Learning enrolments were split across two SSAs, Preparation for Life and Work and Arts, Media and Publishing; and
- A larger proportion of ASF Core enrolments were in priority SSAs than Tailored Learning enrolments.

Figure 3-9: Proportion of learning aim enrolments in each SSA by funding model, 2024/25



GLA experimental analysis mapped Tailored Learning enrolments in London onto SSAs to provide comparable statistics.

Source: ILR 2024/25, R14

3.6.3 Outcomes by funding model

While both working to support the broader aims of the Skills Roadmap to develop Londoners' skills, improve employability and support social integration, the two funding

¹² Tailored Learning is not attributed to SSAs in the ILR as ASF Core provision is. GLA experimental analysis mapped Tailored Learning enrolments in London onto SSAs to provide comparable statistics. The methodology can be found on the [GLA Datastore](#).

models of the ASF each sets out to deliver different outcomes. This aims to build a skills system accessible to all, and establish pathways into higher level learning and employment.

Despite this, data from the LLS indicates that the two funding models deliver similar rates of economic and social outcomes:

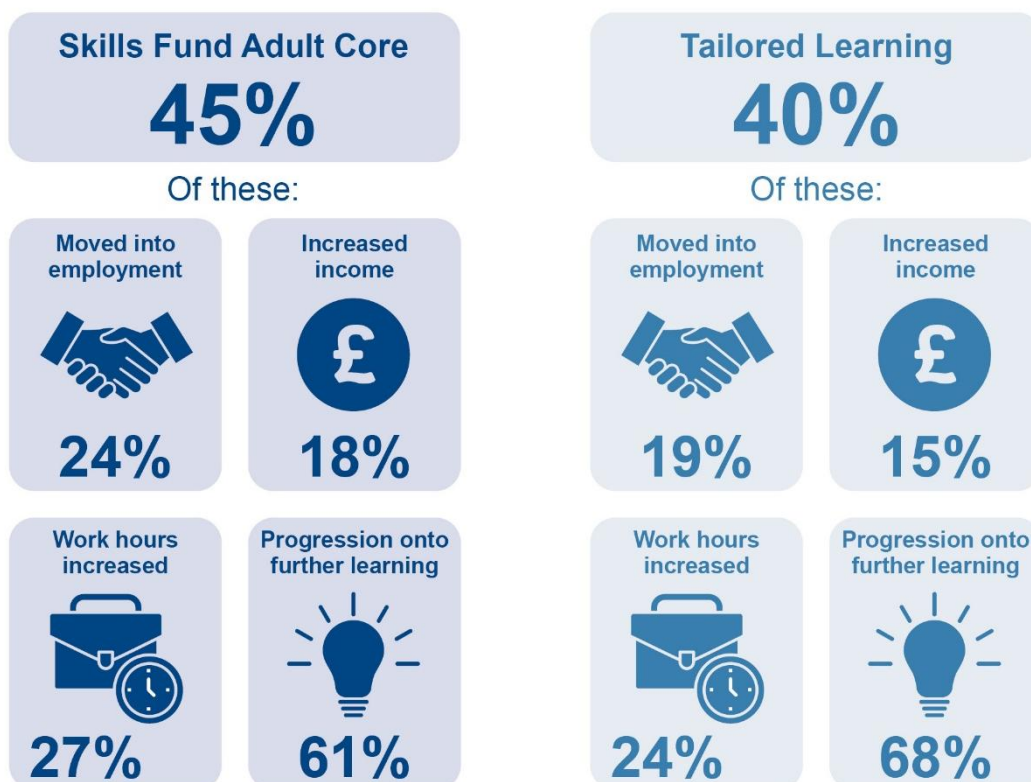
- 45% of learners on formula-funded provision reported economic outcomes, compared to 40% of learners who participated in Tailored learning.
- Almost all learners reported positive social outcomes through both ASF Core and Tailored Learning provision (95% for each funding model).

Economic outcomes

While a higher proportion of learners who engaged in ASF Core provision reported achieving a positive economic outcome, the specific economic outcomes learners achieved varied between funding models. Figure 3-10 displays economic outcomes achieved by learners by funding model, and shows that:

- learners engaged in ASF Core provision reported a higher rate of all job-related outcomes, reflecting the more foundational nature of Tailored Learning provision; and
- learners who engaged in Tailored Learning reported higher rates of progression into further learning, indicating the success of Tailored Learning as a mechanism to support sustained engagement in education.

Figure 3-10: Positive economic outcomes achieved by learners, by funding model, in the 2024/25 academic year



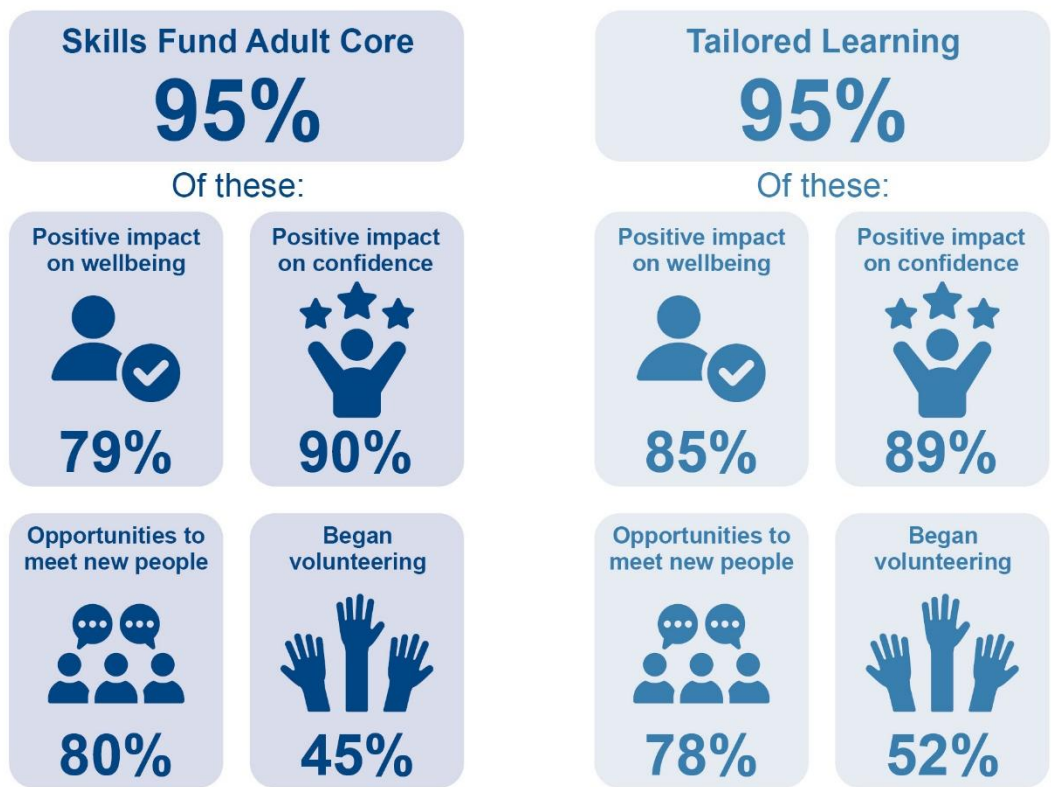
Source: London Learner Survey, 2024/25

Social outcomes

Similar to positive economic outcomes, the rate at which learners achieved specific social outcomes varied by funding model. Figure 3-11 outlines positive social outcomes achieved by learners in the 2024/25 academic year and shows that:

- a greater proportion of learners who engaged in Tailored Learning reported a positive impact on wellbeing, and movement into volunteering than other learners, demonstrating the funding model's commitment to supporting social integration; and
- learners who took part in ASF Core provision reported positive impacts on confidence and opportunities to meet new people at a slightly higher rate than those who took part in Tailored Learning, though these outcomes were high across both models.

Figure 3-11: Positive social outcomes achieved by learners, by funding model, in the 2024/25 academic year



Source: London Learner Survey, 2024/25

4 Funding and accountability reform

This chapter outlines how providers responded to funding reforms introduced in the 2024/25 academic year, and provides an overview of the successes and challenges experienced by providers as a result of change.

Key findings

- **Providers welcomed higher funding rates**, which were described to better reflect the cost of delivery.
- **Without an overall increase in funding, interviewees expressed concern about the longer-term impact on engagement in the ASF.** Providers noted they had started turning learners away due to limited resources which they felt could discourage learners, particularly from underserved communities, from attempting to engage in the ASF in the future.
- **The GLA's ongoing collaboration with providers was a key driver of success.** Providers commended the GLA's attempts to understand on-the-ground experiences of delivery since delegation, and felt that this was reflected in the decisions they made around funding reforms.
- **Retaining a formula-funded model for essential skills offered providers stability.** Providers and adult education representatives valued this deviation from national funding reforms, and felt it demonstrated GLA's commitment to developing the essential skills of Londoners.
- **Information on funding reform was delivered during the late stages of several providers' curriculum planning process.** This caused some providers to retract courses which learners had already enrolled on. Providers expressed concern about the impacts of late decisions and information on their organisational reputation.
- **Providers noted difficulty balancing provision.** Several reduced their delivery of courses funded at higher rates, including in health and social care, and childcare, to prioritise the delivery of provision, which is typically oversubscribed, such as ESOL.
- **Funding reform required providers to deliver more efficiently.** To meet this requirement, providers increased their class sizes, made internal restructures, and made redundancies. These decisions were not taken lightly, and providers were concerned about the impact this would have on the quality of their provision and the learner experience.

4.1 Overview

National funding reform within the ASF was introduced at an already challenging time for London's providers. Since delegation, providers have experienced a series of setbacks, including delivery challenges presented by the COVID-19 pandemic and the knock-on impacts of the cost-of-living crisis on overheads. Despite this, the GLA's ASF allocation from DfE has not increased in line with inflation, leading to overspend for the first time in the 2023/24 academic year and as discussed in the previous chapter, overspend for a second consecutive year in 2024/25.

"We haven't had an uplift in the fund since it was delegated... I think if you look at the figures, the sector has done really well... but I think we're at a bit of a tipping point where we might see participation start to fall."

Adult Education Representative

Funding reform introduced new, higher funding rates for provision, with intent to reflect the heightened cost of delivery due to external economic challenges. While these higher rates were welcomed by providers and adult education representatives, they felt that higher rates should have been met with a larger funding allocation to the GLA. Providers reported that without additional funding, high demand courses were oversubscribed and they increasingly had to turn learners away due to limited resources.

Several providers expressed concern about the impacts this would have on longer-term engagement among underserved communities. They felt that for these learners often applying for a course could take them outside of their comfort zone, and being turned away may discourage them from trying again. Some also had concerns about the influence this would have on their reputation, and long-term negative consequences this may drive.

Despite this challenge, interviews identified many successes of the GLA's approach to funding reform.

Providers and adult education representatives noted the GLA's collaboration with providers as a key driver of success throughout funding reform. Providers commended the GLA's efforts since delegation of the ASF to understand the challenges providers experience, and felt this was largely reflected in decisions they made.

Adult education representatives valued the emphasis that the GLA places on Tailored Learning. They appreciated that the GLA understands the importance of Tailored Learning as a first step in a progression pathway.

Additionally, a few providers shared that funding reform has encouraged them to take a more targeted approach to building relationships with employers and community partners. They explained that they are targeting employers and community partners in priority areas, to ensure they are aligned with strategic priorities.

"Funding reform has definitely supported us to be more focused in the relationships we're building in the local community."

Further Education College

Despite this, both ASF providers and adult education representatives indicated that the GLA's decision to retain a formula funded model for essential skills provision offered providers stability. This was described to be an informed decision with understanding of the importance of essential skills provision for both providers and learners. As well, this deviation from national policy allowed the GLA and providers in London to maintain strategic insight into how essential skills is performing in the Capital.

“I completely agree with the GLA’s decision to keep essential skills as a formula-funded provision. It should be, it’s the best way to ensure we’re delivering core skills to as wide a range of learners as possible.”

Local Authority

4.2 How providers responded to funding reform

Funding reform influenced several changes to the composition of courses offered by providers across London.

4.2.1 Curriculum planning

Providers described a lengthy provision planning process, which typically begins in the November before the following academic year. Providers said that this lead-in time allows them to review the provision in their local area in order to reduce duplication and competition between providers. It also allows providers to review national and GLA priorities and local workforce needs to ensure their offer delivers practical knowledge and skills, aligned with policy priorities. At this stage, providers typically review delivery plans and actual delivery before making estimates for the next academic year.

On the introduction of the new funding model and rates, providers explained that the first step in their planning process shifted from an external, research exercise to an internal exercise to understand operational efficiencies. This curriculum review placed greater weight on identifying courses within their existing portfolio that are consistently in high demand and/or oversubscribed, and courses that are more often undersubscribed as part of planning for the 2024/25 academic year.

“Any funding reforms impact our curriculum... We did a big curriculum review to analyse what we were offering and how we can improve that.”

Further Education College

There were mixed views among providers about the timeliness of detail on funding reform and the accompanying funding rules, and the knock-on impact this had on their ability to prepare for reform. Providers with large funding allocations often spoke more positively on this topic, owed to their additional capacity to make changes at pace and security through other funding streams. Conversely, providers with lower funding allocations found the timeline challenging, with several indicating their resource and capacity does not lend itself to late changes.

“Information on funding reform was all a bit late in the day... we struggled with the concept of Tailored Learning and the different changes the GLA were making compared to the national reform, and change our planning accordingly.”

Local Authority

Echoing this, providers felt that generally funding rules should be finalised earlier. Some said they had had to retract courses that learners were already enrolled on due to changes to funding rules close to the start of the academic year.

4.2.2 Adaptations to overall offer

The curriculum review process resulted in an overall shift in the provision offered in the 2024/25 academic year as formula funding uplifts for several courses encouraged providers to prioritise in-demand courses. This meant, however, that providers had to make challenging decisions on how to balance higher costs within stable total allocations.

Across interviews, providers noted the importance of stability of ESOL provision as demand consistently outstrips supply. To deliver this stability, providers made cuts to courses funded at higher rates, including health and social care and early years and childcare courses. Adult education representatives felt this was the most logical short-term decision for providers given the diversity of London's population, however, were cautious about the long-term impact of this decision on the health and social care and childcare workforce, both of which are already experiencing shortages.

"We reduced our Adult Social Care courses, because our enrolments were lighter and they're expensive courses to run. ESOL on the other hand, always over-subscribed and much cheaper to run. So, we had to make some real strategic decisions, particularly with those more expensive Level 2 courses. Otherwise, we would have had to cut ESOL provision."

Local Authority

Additionally, several providers delivering Tailored Learning made the decision to reduce funding for leisure and personal development, including health and wellbeing and enrichment courses. This funding has instead been redirected into other non-regulated provision that previously fell under Adult Skills Core funding, including employment-focused courses.

Feedback from providers suggested that by narrowing the range of provision they offered they were able to drive greater alignment between their offer and GLA and local strategic priorities. They also shared that they were able to develop clearer progression pathways for learners into higher level provision.

Local Authorities, many of whom are predominantly delivering essential skills provision since funding reform, expressed concern about their ability to support learner progression into higher level courses following changes to their offer. They recognised the need for greater collaboration with other local training providers and universities to develop better coordinated local skills offers and clearer pathways. However, they appeared to be struggling to build links with other providers. Suggestions to the GLA to support this included:

- facilitating provider collaboration;
- mapping the spread of provision across London to support identification of overlap; and

- working to reduce competition between providers delivering provision under the same funding model to enable progression routes into higher-level learning.

“Instead of having providers try and figure out how they fit into their local landscape, it would be really nice if there was something where we could see ‘well, that’s being offered here’ so we could offer it, or actually we shouldn’t because someone else is already offering it.”

Local Authority

4.2.3 Staffing changes

Staffing costs are an important overhead for providers. Shortages within the teaching workforce, and providers’ inability to keep up with rising salary expectations since the cost-of-living crisis have created a recruitment and retention challenge for providers in recent years.

Across interviews, there was evidence that changes to provision led to staffing restructures, and in some cases redundancies. Providers with larger allocations were able to deploy staff to different subject areas, such as some essential skills courses or short employer-focused courses. However, smaller providers in which entire subject areas within their portfolio were dropped, were not able to restructure in the same way, and therefore let staff go. These providers also increased class sizes to increase efficiencies, raising concern over lowered quality of provision and a poorer learner experience.

“We’ve had to reduce the number of tutors and restructure internally, and we’re running at very limited capacity. Our class sizes are bigger and we can’t respond to requests from community organisations or employers unless they have the numbers to run a whole class.”

Local Authority

Providers felt that recruitment challenges mean more time is required to hire and onboard new teaching staff, particularly in emerging and priority areas. Echoing earlier comments on the timeliness of funding rules, general feedback from providers was that there needs to be earlier publication of funding guidance to allow adequate time to recruit.

4.3 Conclusion

The GLA’s approach to implementing funding reform was welcomed by ASF providers and adult education representatives. Retaining a formula-funded model for essential skills provision offered stability to providers during an already challenging economic context, and enabled the ASF to continue supporting the GLA’s policy objectives. The GLA’s continued efforts to engage with ASF providers and understand their experiences of delivery was noted as the key driver of this success.

Despite this, providers explained that funding reform directly impacted the number of learners they were able to support in the 2024/25 academic year. Several explained that they tried to offset this by increasing efficiency through increased class sizes, among other approaches. However some described having to make changes to their overall

offer, retracting some courses funded at higher rates in order to prioritise courses which are typically oversubscribed, and essential skills provision.

Providers expressed concern about the longer-term impact of funding reform should there be no increase in overall funding allocations to the GLA. GLA-funded over delivery and providers' approaches to increasing operational efficiencies are unsustainable without additional financial support that reflects an increasingly challenging economic environment.

5 Essential skills and provision up to Level 2

This chapter presents the increasing need for essential skills and provision up to Level 2 in London, before providing an overview of who enrolled in the relevant courses in the 2024/25 academic year. Following this, is an exploration of the alignment between the Sector Subject Areas of courses Londoners enrolled on and GLA priority sectors.

The chapter then focuses on essential skills in more detail, outlining the composition of essential skills provision across London, before closing with a summary of learner outcomes on completion.

Chapter summary:

- **Provision up to Level 2 engaged a diverse range of Londoners** and demonstrated success targeting learners from communities that are most impacted by skills disparities, including those from ethnic minority backgrounds and learners aged 50+.
- **Enrolments on provision up to Level 2 decreased as a total proportion of ASF enrolments** on the previous academic year but remained similar to that delivered by other MSAs.
- When exploring enrolments by SSA it is evident that **as learning level increases, the provision learners access becomes more aligned with London's priority sectors**. At Level 2, two-fifths of provision is within a priority SSA.
- **Enrolments on essential skills provision accounted for over half of enrolments on provision up to Level 2** for the first time since delegation. Increases across skills have not been equal, however, with both English and maths falling to their lowest proportion of enrolments up to Level 2 since delegation.
- **Enrolments on digital skills provision remain below what is observed nationally**, which may be exacerbating employer skills shortages and increasing challenges Londoners face navigating everyday life and securing employment.
- **Almost all learners achieve positive social outcomes** and between two-fifths and half achieve positive economic outcomes, increasing with level of education.

5.1 An increasing need for Level 2 skills in London

London has a competitive labour market, with a higher concentration of higher-skills jobs than elsewhere in the UK.¹³ However, research conducted by Learning and Work Institute found that while London has some of the lowest essential skills needs nationally, 10 of the 20 wards in England with the highest essential skills needs are located in the capital.¹⁴

¹³ [Increasing concentration of high-skilled jobs in London](#) | Institute for Fiscal Studies

¹⁴ [Modelling Essential Skills Needs Across England](#) | Learning and Work Institute

This is exacerbating persistent skills shortages experienced by employers in London across priority sectors.

Reflecting this complex landscape, driven by an unequal distribution of skills availability, a key priority of the Skills Roadmap for London was to deliver learning that supports progression in education, employment and in individuals' personal lives. For this, the Mayor emphasised the importance of ensuring Londoners are supported to gain essential skills at Level 2 and below. This would support a wider, more diverse range of Londoners to contribute positively to both their local community and London's economy by increasing their economic prospects.

5.1.1 The London Factor

In recognition of the higher cost of delivering ASF provision in London, and to support and encourage providers to deliver essential skills at scale, the GLA introduced the London Factor in the 2020/21 academic year. In its first year, this was a flat-rate funding uplift to English and maths courses at Levels 1 and 2 that are part of a learners' legal entitlement. In the 2022/23 academic year, this was expanded to become a 10% increase to all funded courses up to and including Level 2. In the 2022/23 and 2023/24 academic year, the London Factor was increased to 13.5% and 15% respectively.

Funding reform introduced for the 2024/25 academic year included a funding uplift for the majority of ASF funded courses nationally. Reflecting this, the breadth of the London Factor changed, and was applied to:

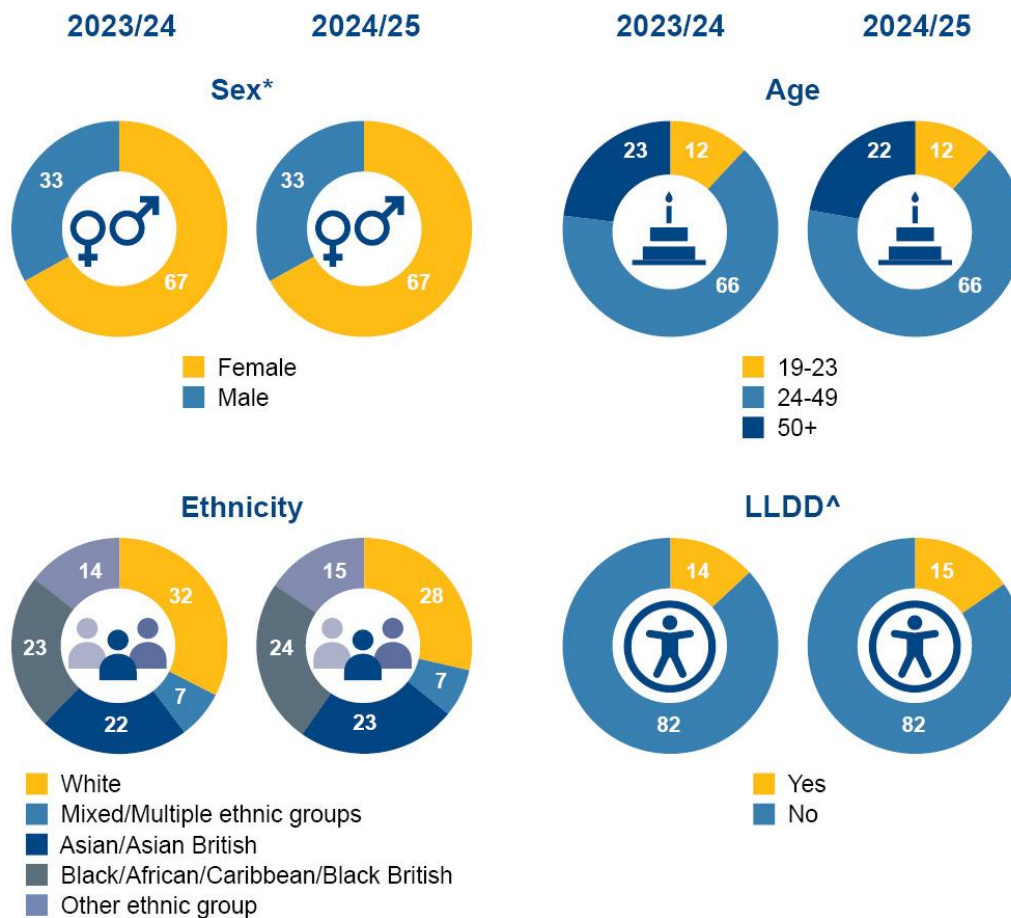
- entry level essential skills qualifications;
- legal entitlements at Level 2 and below; and
- non-regulated, formula funded learning aims specific to the GLA.

5.2 Who is taking part?

The ASF successfully engaged a diverse range of learners in provision up to Level 2 in 2024/25. This reflects the importance of skills up to Level 2, and the Skills Roadmap's priority to equip Londoners from all backgrounds to contribute to society, connect with others and improve their economic prospects by providing accessible adult skills provision. Figure 5-1 outlines the demographics of learners who engaged with provision up to Level 2 in 2024/25, with comparison to the previous academic year. Notably:

- as observed across the ASF as a whole, more female learners participated in provision up to Level 2;
- nearly one-third (30%) of learners were aged 50+, and three-fifths (60%) were aged 24-49; and
- three-fifths (60%) of learners were from ethnic minority backgrounds, indicating that essential skills provision and learning up to Level 2 is successfully targeting those most susceptible to skills disparities.

Figure 5-1: Demographics of learners who engaged in provision up to Level 2 in 2024/25, with comparison to 2023/24



* Based on self-declaration by the learner of 'legal sex'

^ Based on self-declaration by the learner

Source: ILR 2024/25, R14

Of the 59 providers who responded to the survey, almost all said that they use partnerships with local community organisations (55 providers) and word of mouth (51 providers) to reach learners. These partnerships enabled them to reach learners from underserved communities, including; parents, prison leavers, ethnic minority groups, and survivors of domestic violence.

Interviews highlighted the particular importance of co-designing Tailored Learning provision with community partners to ensure course content, delivery mode and scheduling were aligned to learners' needs and were accessible. They also delivered provision in community settings familiar to learners, which they felt encouraged initial and sustained engagement, supporting progression into higher level provision.

"...the advantage of [delivering through partners] is that we deliver in about 25/26 different venues across the borough. That includes schools, nurseries, community venues, leisure centres, libraries, hotels and other places, and that's how we can tap into those learners that

wouldn't necessarily travel outside of their immediate area, they wouldn't go into college, and we start to develop their skills to even just jump on the bus."

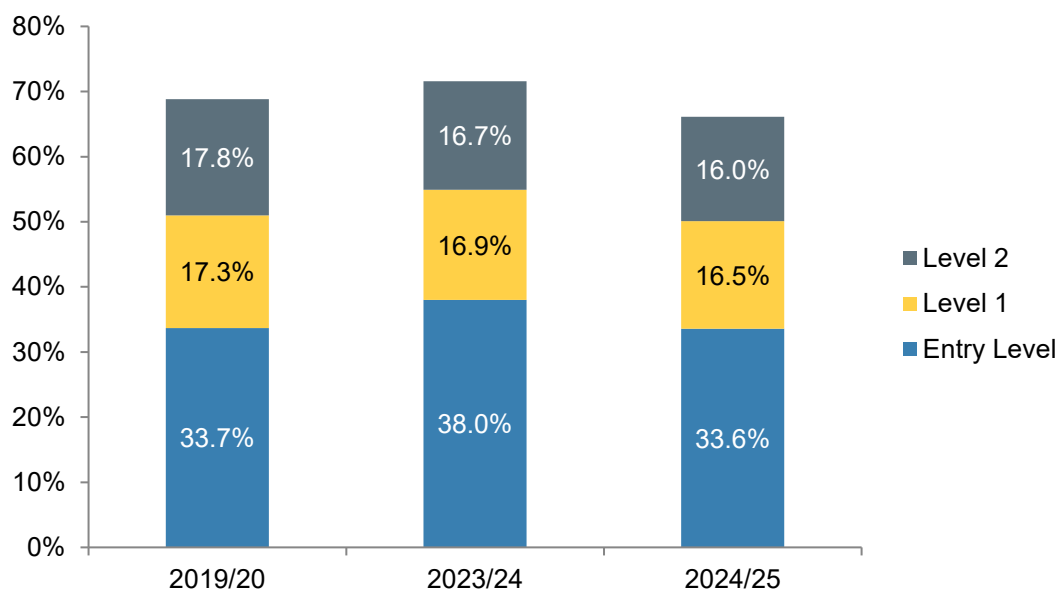
Local Authority

5.3 Enrolments by level

Demonstrating providers' commitment to the Skills Roadmap's aim to develop Londoners' foundational skills, enrolments on provision up to Level 2 remained high in 2024/25, accounting for two-thirds of all ASF enrolments. Figure 5-2 presents enrolments by level in the 2024/25, 2023/24 and 2019/20 academic years and shows:

- while overall enrolments remained high, the proportion of enrolments on provision up to Level 2 decreased in 2024/25 on the previous academic year. This is largely driven by the GLA's increasing focus on Level 3 provision; and
- enrolments at both Level 1 and Level 2 have reduced by 1 and 2 percentage points, respectively, since delegation.

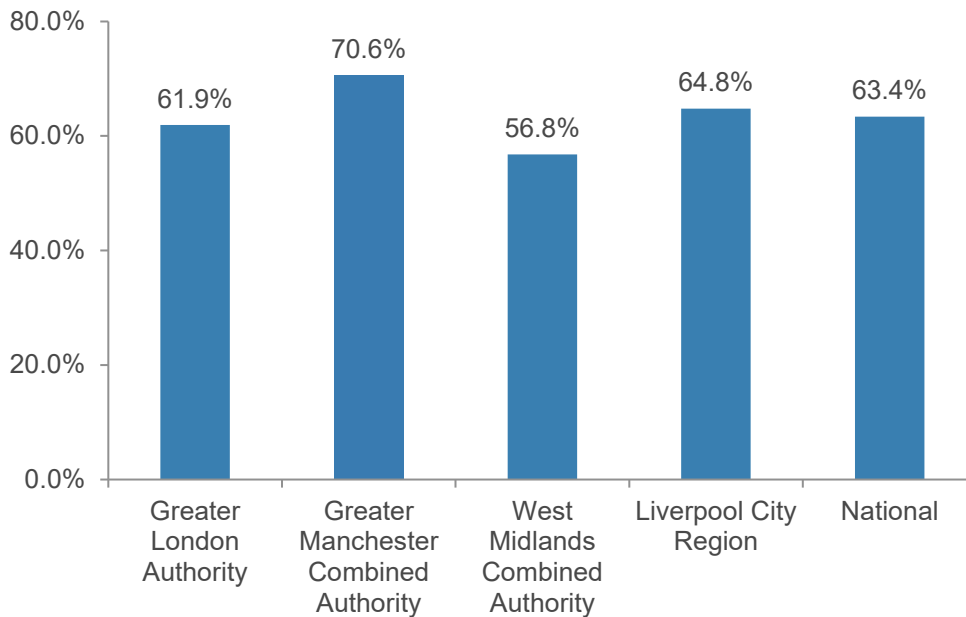
Figure 5-2: Proportion of enrolments across provision up to Level 2 by level in the 2019/20, 2023/24 and 2024/25 academic years



Source: ILR 2019/20, R14; 2023/24, R14; 2024/25, R14

Data from the DfE Education and Training dashboard,¹⁵ displayed in Figure 5-3, shows that provision up to Level 2 was generally high across other urban Mayoral Strategic Authorities (MSAs), accounting for around three-fifths to two-thirds of provision. In comparison to other MSAs, the GLA delivered a slightly lower proportion of provision at Level 2 and below than some others, however delivered at a similar level to that observed nationally.

Figure 5-3: Proportion of ASF provision at Level 2 and below across urban MSAs¹⁵



Source: DfE Education and Training, 2024/25

5.3.1 Sector Subject Areas

Reflecting the broad composition of the ASF, the most common SSA at each level in 2024/25 was Preparation for Life and Work, accounting for:

- 85% of enrolments at Entry Level;
- around two-thirds (63%) of enrolments at Level 1; and
- one-quarter (26%) of enrolments at Level 2.

In relation to the priority sectors in the Skills Roadmap:

- at Entry Level, around one in ten enrolments (12%) were in priority SSAs; and
- this increased to nearly two-fifths of all enrolments (37%) at Level 2 in priority SSAs.

¹⁵ DfE's Education and Training dashboard uses a different methodology to present enrolments than used by The GLA. For example, DfE figures are not limited to GLA funded learners. Therefore, GLA figures presented in this graph may differ from other figures used throughout this report.

This increase can largely be attributed to enrolments in health, public services and care, which accounted for fewer than 1% of enrolments at Entry Level but around one-quarter (23%) at Level 2, making it the second largest SSA at Level 2. This indicates a positive alignment of provision and the requirements of entry level positions in the health and social care sector, a key priority within London's labour market.

In focus: Preparing Londoners for careers in the NHS

An ASF provider and the NHS have teamed up to deliver essential skills required to gain entry level employment in a local, multi-site NHS Trust.

The College runs a 1-week intensive pre-employment training course, delivering skills and aptitudes required to enter a range of entry level roles across the Trust, including admin and clerical, medical, healthcare, pharmacy, phlebotomy, and security roles. Each cohort has between 8 and 12 learners who can choose to study either online or face-to-face, but includes a celebration event at which each learner must deliver a face-to-face presentation. Learners are recruited through engagement events, Jobcentre Plus, libraries, community centres and family events. Online open days are available once they have been referred.

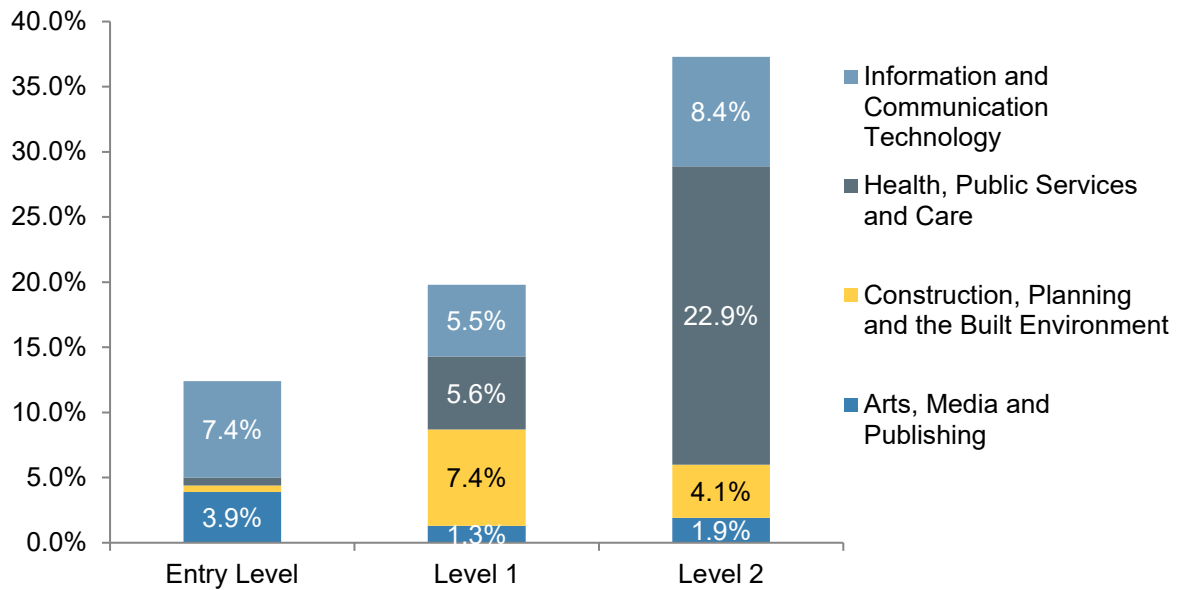
Through their partnership, the college and the Trust have developed a targeted course that covers the Trust's values and ethics, empowers learners to upsell their transferable skills, and helps them prepare for their application through mock interviews and presentations. At the end of their course, learners are signposted to a range of relevant job openings within the Trust.

This longstanding programme demonstrates the successes of collaborative working. The employer continues to have input into the course, with annual discussions to guide any changes needed to the course as roles within the Trust evolve. Reflecting on the success of the partnership, the employer noted the increased confidence among participants as a result of the course:

"The candidates are well prepared after the training...When you see them starting the training on the first day and then finishing on the last day, when they deliver the presentations there's a huge difference. Confidence, yes. So you know the quality of the services they provide and that's why we keep this partnership because it's of value for us as well."

The employer also referenced other key success factors for the partnership, such as excellent communication and the provider's responsiveness. The two organisations also share statistics on job outcomes and are pleased to say that over 60% of participants go on to secure roles at the trust with others taking up roles elsewhere.

Enrolments across other SSAs remained relatively stable across levels. Figure 5-4 presents the proportion of ASF Core enrolments in provision up to Level 2 across GLA priority areas.

Figure 5-4: ASF Core enrolments in provision up to Level 2 across five priority SSAs.

Source: ILR 2024/25 R14

In the provider survey, almost all providers (53 providers) said that they work with employers to design and deliver provision that is relevant to the skills employers need. In interviews, providers described varied success engaging employers, particularly in the GLA's priority sectors.

Attending local strategy groups, such as local employment and skills groups organised by sub-regional partnerships, was viewed as the most successful way for providers to reach employers directly. This allowed providers to understand the skills needs of employers and respond directly by showing how the ASF can meet their needs.

Others emphasised that it was important to ensure employers feel they are benefitting from their engagement in course design and delivery, particularly SMEs and micro-businesses who often have time and resource constraints. Providers gave examples of offering 'partner' status, allowing them benefits to wider networks and marketing on their behalf.

"Obviously we have to have a bit of a carrot. When an employer supports a course, or helps us design a course, we say to them 'we'll class you as a partner, we'll plaster you all over our website.'"

Further Education College

Other providers shared specific examples of supporting courses aligned to the GLA's priority sectors. Several providers noted that they had increased their outreach to employers in healthcare, construction and IT services to ensure the courses they deliver are relevant to industry needs.

In focus: Engaging employers in construction

A large FE College shared how they proactively built a strong relationship with employers in the construction industry and how this partnership is supporting learners into work.

With several major regeneration projects happening in nearby boroughs, the college saw an opportunity to support local residents into new job opportunities being created. To make the most of this, they made a strategic decision to dedicate 50% of their ASF budget to courses that directly supported progression into construction roles.

When shaping these courses, the college focused on working with large, national employers. They felt this would give them the clearest picture of industry-wide skills needs, while still supporting smaller, local business in the supply chains. At the same time, they worked closely with local Jobcentre Plus offices to understand demand for construction work locally.

After positive conversations with Jobcentre Plus offices and 4–5 construction employers, the college created a 2-week course designed to equip unemployed Londoners with the essential skills needed to enter the construction sector.

Throughout the 2024/25 academic year, the course ran on a rolling, fortnightly basis, with classes of between 16–20 learners. This allowed the college to deliver 92 courses across the year, supporting around 1500–1800 learners.

Each cohort benefitted from an employer-led session, offering a valuable opportunity to build their confidence and practice interacting with employers. The college was also able to make use of the GLA's Licence to Practice flexibility, supporting learners to secure a CSCS card and be site ready.

The programme was a key success for the college, achieving a job-entry rate on completion of 65%.

5.4 Essential skills

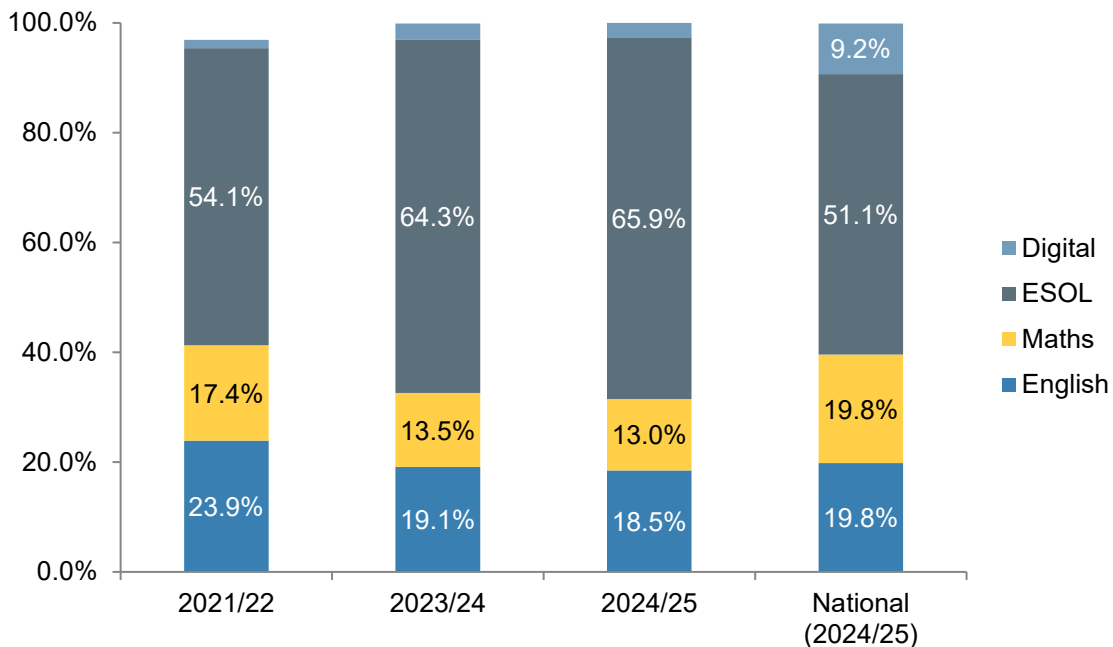
For the first time since delegation enrolments on essential skills provision in London accounted for over half (54%) of enrolments on provision up to Level 2, up from 47% in 2023/24. This is higher than observed nationally, where essential skills provision accounted for just below half (48%) of enrolments. This increase directly supports the Mayor's priority to support Londoners to achieve essential skills qualifications at Level 2 and below.

Since 2020/21, when ESOL and digital were formally categorised as essential skills, the composition of essential skills provision in London has changed considerably. Notably:

- enrolments on ESOL provision have consistently been higher in London than seen nationally, and reached two-thirds (66%) of essential skills enrolments in 2024/25, up from around half (54%) in 2020/21;
- English and maths accounted for their lowest proportion of essential skills enrolments in London in 2024/25 at 19% and 13% respectively, both of which represent a lower proportion of essential skills enrolments in London than nationally; and

- digital skills provision has increased slightly from 2% of enrolments in 2020/21 to 3% in 2024/25, however remains considerably lower than observed nationally.

Figure 5-5: Proportion of essential skills enrolments by skill in London (2021/22, 2023/24 and 2024/25) compared with national enrolments (2024/25)



Source: ILR 202/21 R14; 2023/24 R14; 2024/25 R14; DfE, 2025

Expanding ESOL provision is a key success of the GLA's delegated ASF, directly supporting the Mayor's commitment to ensuring Londoners for whom English is a second language are able to access good employment and support services, and are able to comfortably integrate into their local communities. Interviews with providers and stakeholders emphasised the rising need for ESOL provision to support London's diverse population.

In focus: Support social integration through ESOL provision

Arslan* moved to London from Turkey and quickly joined a short English course to begin developing his language skills to help him settle in to his new home, and to help him get the qualifications he needs to continue learning and become a chef.

When this short course finished, Arslan wanted to carry on developing his language skills and was recommended an online class delivered by a local college. He liked that the course was online, he said it made it easier to attend and saved him money on travel. He also reflected on how this worked for his classmates, particularly those with young children who would not otherwise be able to join the course.

The class was made up of around 20 students from a range of countries. To make people more comfortable and encourage people to speak more, the tutors used breakout groups and small group activities, which Arslan enjoys. This gave him the opportunity to get to know his classmates. Beyond the learning in class, there were also online resources and catch-up

opportunities, WhatsApp groups and emails, which all contributed to Arslan's positive experience of the course, and helped him keep up with the pace of learning.

Arslan has now progressed all the way from Entry Level to Level 2 Functional Skills, which he's studying now. Reflecting on what he had achieved, he spoke positively of the role of his tutor in supporting his confidence both with English, but in everyday life and his aspirations.

"Your teacher always supporting you, giving you the nice ideas. Making you more confident. Sometimes pushing you to create something much better than what you did before."

Most importantly however, Arslan emphasised the importance of the course in supporting his social integration. He had the opportunity to meet other students from a range of different cultures, learn about their values and traditions and discuss the news and stories from home. Arslan felt positive about the skills these interactions were offering in supporting him to build a life in the UK.

"I think most importantly about all these classes is that they integrate us, and you can learn so many new things. Sometimes for example we talk about daily news, we talking about historical things, or how to handle some situations, you know how we need to react, what is the right way."

*Not his real name

In recognition that the demand for ESOL provision greatly outweighs supply, providers described innovative approaches to combining ESOL courses with other ASF provision and volunteering opportunities. Some examples include:

- embedding ESOL into other courses, such as English and maths;
- enrolling learners on vocational courses that run alongside their ESOL provision to facilitate more opportunities to socialise, developing their language skills while also learning skills for work; and
- working with Local Authorities and/or community partners to secure volunteering opportunities for learners to run alongside their course.

Despite this success, providers are increasingly faced with the challenge of balancing their essential skills offer. Without an increase in funding allocation, the increase in ESOL provision has been a result of a decrease in English and maths provision. While in recent years programmes such as London Multiply have offered additional funding to support uptake in other essential skills, a long-term funding solution is required to ensure Londoners are able to access the essential skills provision they need, particularly maths and digital.

5.4.1 Digital skills

Research conducted by Lloyds Banking Group and Ipsos identified that 7% of adults in London live without essential digital skills needed to navigate everyday life, and 14% do

not have relevant essential digital skills for work.¹⁶ In parallel, around two-fifths (38%) of employers shared that digital skills are difficult to obtain from applicants in the 2024 ESS, up from one-third (32%) in 2022.⁴

The Skills Roadmap for London outlined its commitment to support the development of sector-specific training environments, including through investment in digital infrastructure. Despite this, when discussing digital skills provision, providers outlined the increasing challenge associated with the cost of securing and updating digital infrastructure.

In interviews, some providers noted that they had been able to secure capital investment to update their suite of technology to offer up to date courses, relevant to the skills needs of employers. However, they said that rising prevalence of AI has increased cyber security costs, which they are not able to justify within constrained resources. Recognising that digital skills are rapidly increasing in importance, providers called for greater support to secure capital funding, citing this as the largest barrier to delivering more digital skills provision.

An ongoing commitment to ensuring providers are equipped to deliver essential digital skills is imperative to ensuring Londoners have the capabilities to navigate everyday life and improve their employability.

5.5 Outcomes

While provision up to Level 2 aims to develop pathways into further learning, learning at this level also operates as an important mechanism for improving Londoners' health and wellbeing, social integration and confidence. Learners who engaged in ASF provision reported a range of economic and social outcomes aligned to aspirations of the Skills Roadmap for London. London Learner Survey data indicates that:

- 41% of learners on Entry Level provision achieve positive economic outcomes, rising to 46% at Level 1 and 48% at Level 2; and
- almost all learners on provision up to Level 2 report a positive social outcome, ranging from 95% at Levels 1 and 2 to 96% at Entry Level.

5.5.1 Economic outcomes

Economic outcomes reported by ASF learners in the 2024/25 academic year varied, with a higher proportion of learners on Level 2 provision reporting any of the relevant outcomes. Figure 5-6 indicates that:

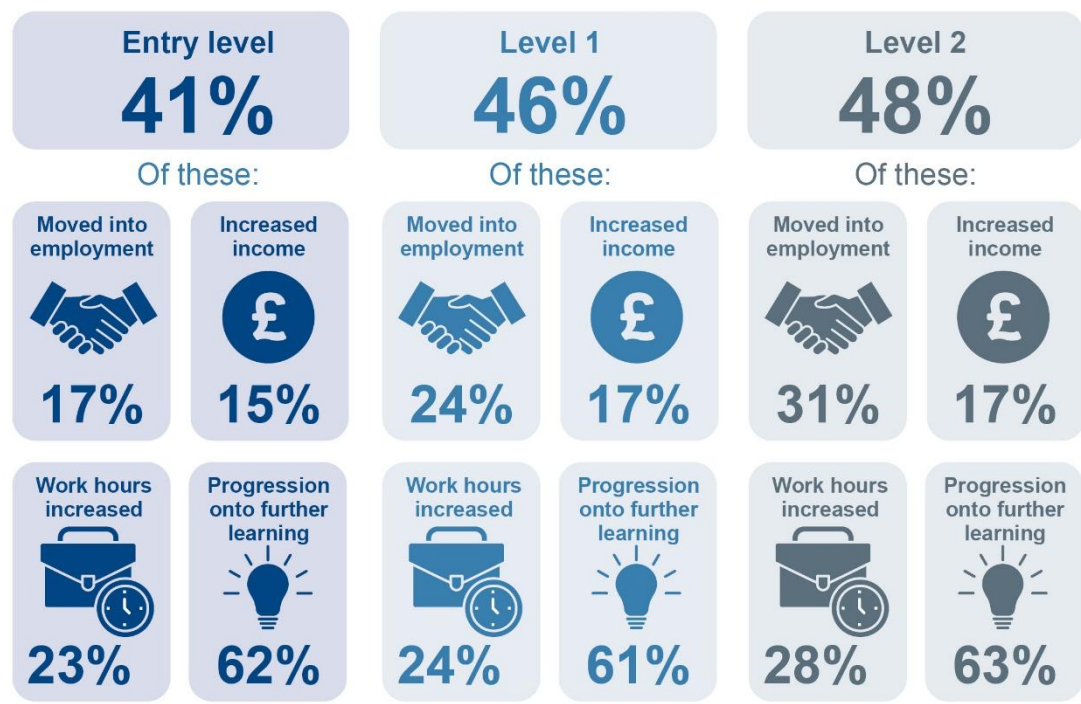
- the proportion of learners reporting employment outcomes increases with level of education. This indicates the importance of Level 2 qualifications as a gateway to

¹⁶ [Essential Digital Skills 2025](#) | Lloyds Banking Group

employment and is aligned to existing evidence on labour market returns being greater, the higher the qualification level;¹⁷

- around one-sixth (15–17%) of learners at each level reported increased income; and
- over three-fifths of learners progressed into further learning, a key aim of provision up to Level 2, indicating positive pathways into higher level provision.

Figure 5-6: Economic outcomes achieved by ASF learners who took part in provision up to Level 2 in the 2024/25 academic year



Source: London Learner Survey, 2024/25

Reflecting a high proportion of progression into further learning, 20 of the 59 providers that responded to the provider survey said that the GLA’s management of the ASF had allowed them to support more learners at Level 2 and below, into higher level learning.

In focus: Overcoming a fear of maths

Katja* had negative experiences of learning maths at school. She struggled to keep up with the pace of the class and fell behind her peers, which added pressure to learn at speed. She felt frustrated, that she was underachieving, and didn’t feel her school had the right support in place to help her catch up. At 18, Katja left school without a maths qualification.

¹⁷ [State of the Nation, 2023: People and Places](#) | Social Mobility Commission

"I was very good at every other subject at school, except for maths, and I had teachers who would let you know you were bad. So, I had a very traumatic relationship with maths, not just a fear, but a trauma... when I finished school, I was so relieved I didn't have to sit another maths exam in my life."

After a long career avoiding maths, Katja wanted to change careers but was facing rejection from employers because she didn't have a GCSE equivalent qualification in maths. She knew she needed intensive support, and to start right at the beginning if she was to progress on to get her GCSE. She found a Level 1 Functional Skills course at a college in central London and enrolled.

After completing her first mock test, Katja was prepared to leave the course as she thought she would not be able to progress. Her tutor arranged additional 1-2-1 support for her to develop revision strategies and exam techniques, and offer additional maths tuition. Katja sat her Level 1 exam and passed.

"I told my tutor I was going to quit and that I didn't want to go and sit an official exam... she told me 'I think you should stay in the course'. And I did, and I passed the official exam, and I immediately enrolled onto the Level 2."

With the right support, Katja started to enjoy maths. Her and her classmates revised together, and supported one another to understand concepts they found tricky. She felt relieved of the past trauma she had associated with maths and felt that she had learned valuable functional skills.

"Suddenly I felt some other prospects were open in life, and I genuinely wouldn't have done it without the support from the college".

*Not her real name

Broadly providers commended the ASF's support for employment outcomes, particularly at Levels 1 and 2. However, feedback from some providers suggested that qualifications at these levels do not provide learners with a competitive edge in London's labour market. Instead, they noted that employers are increasingly requiring Level 3 qualifications and felt there was a disconnect between the provision being accessed and the skills employers need.

Adult Education representatives echoed this, and recognised the importance of training beyond Level 2 qualifications to support good employment. They praised the GLA's broad definition of skills for its ability to develop a safe learning environment for communities who are often underserved, supporting learner pathways from lower level and essential skills provision into higher level provision.

"The GLA has always adopted the broadest definition of 'skills'. Elsewhere, 'skills' means employment, but under the GLA's approach skills includes skills for wellbeing, for health, participation and civic democracy... that approach has been really enabling. What it's meant is that people can justify doing low level literacy, numeracy etc., and although it means they might not start work immediately, if work is what they seek, they will get there by working their way through the levels, including Level 3."

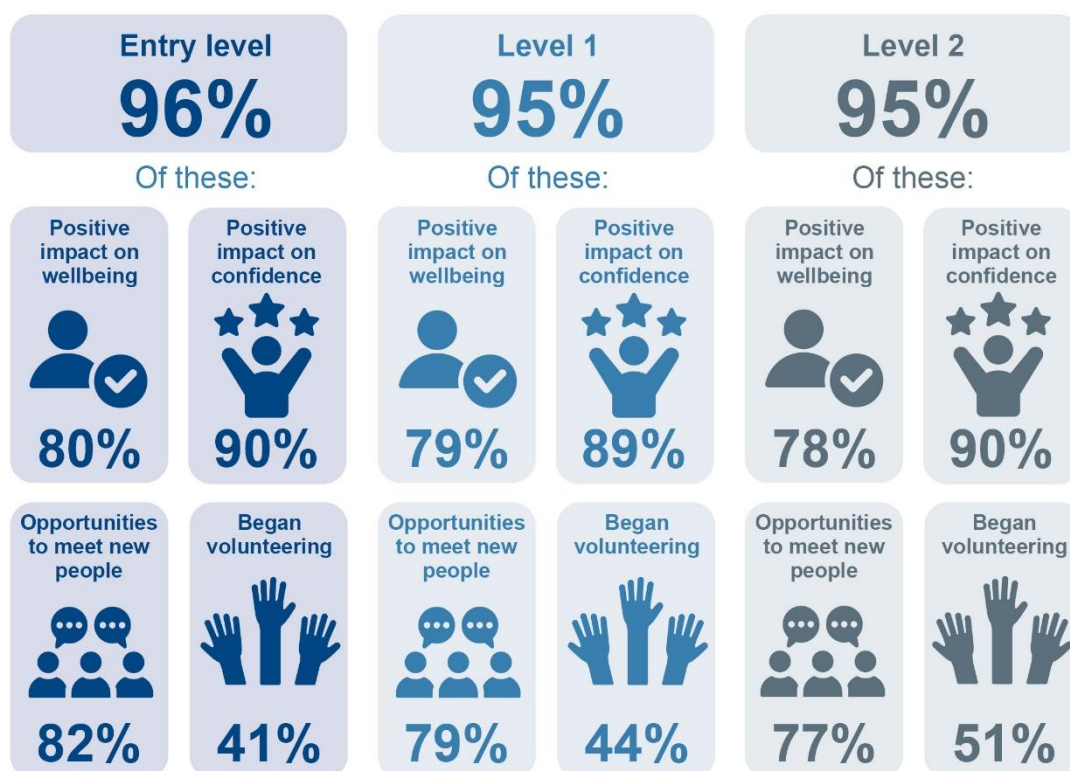
Adult Education Representative

5.5.2 Social outcomes

Figure 5-7 presents social outcomes achieved by learners who engaged with provision up to Level 2. There were high rates of outcomes across the learning levels:

- Around four-fifths of learners at all levels reported a positive impact on their wellbeing, ranging from 78% at Level 2, up to 80% at Entry Level.
- Almost all learners reported increased confidence across levels.
- 82% of learners at Entry Level said they had the opportunity to meet new people, with the figure remaining high through Levels 1 and 2 (79% and 77%, respectively).

Figure 5-7: Social outcomes achieved by ASF learners who took part in provision up to Level 2 in the 2024/25 academic year



Source: London Learner Survey, 2024/25

Evidence from interviews with providers indicated that through their engagement with Tailored Learning and Entry Level provision, learners begin to socialise with people they would not otherwise meet. This was viewed to positively impact their confidence, support their sense of community and support their learning. Combined, these were considered to have a positive influence on their health and wellbeing.

“A lot of our learners report increased confidence, sometimes in the subjects they’ve studied but also socially... they enjoy coming to our centres and meeting people. There’s quite a lot of that and it’s improved wellbeing as well.”

In interviews providers expanded on the confidence and wellbeing outcomes learners achieved throughout and following their course. In particular, interviewees from FE colleges explained that learners enrolled on courses delivered on campuses are often able to access wraparound support, enabling them to overcome wider personal support needs. Some examples included support for mental ill-health, domestic violence, and careers guidance. For learners this can offer stability to progress into higher levels of adult education, and move them closer to the labour market.

“Once they’re in that college environment, they also benefit from other wrap around support that we give. So, if they’ve got domestic violence going on we can offer support around that. If they are refugees or asylum seekers we have a lot of support available... We have Level 6 qualified careers advisors, so they can come and have one-to-one careers conversations.”

Further Education College

5.6 Conclusion

The Skills Roadmap for London set out the GLA’s commitment to ensuring Londoners have the skills needed to navigate everyday life in London, progress into higher level education, and support growth through participation in London’s labour market. Within this, ensuring Londoners are adequately supported to develop essential skills and gain qualifications up to Level 2 was a key priority, particularly among learners from underserved communities who are most disadvantaged by skills disparities.

In the 2024/25 academic year, the GLA’s ASF continued to show strong support for this priority. The majority of ASF provision in London remains at Level 2 and below, extending London’s long-standing commitment to delivering essential and Entry Level skills required to support a range of social and economic outcomes. The ASF engaged a diverse range of Londoners in provision that supports the development of foundational skills and aptitudes required to enter employment in sectors important to London’s economy.

Interviews and case studies highlighted the success of partnerships between ASF providers and employers to support movement into entry level employment in sectors such as construction and health and social care. Additionally, the evaluation identified the key contribution of Tailored Learning and Entry Level provision to the development of learners’ confidence to both, navigate everyday life and continue engaging in learning, and support social integration.

6 Provision at Level 3 and above

This chapter outlines the aims and funding sources of Level 3 provision in London in 2024/25, and describes who enrolled in the provision, types of learning Londoners enrolled on, and the outcomes they achieved following participation.

Chapter summary

- **Provision at Level 3 and above continued to engage a diverse range of learners** in 2024/25, indicating that London's delegated ASF is successfully targeting learners from a variety of backgrounds, supporting inclusive growth.
- **Provision at Level 3 and above continued to grow as a proportion of all ASF enrolments**, reflecting the GLA's increased focus on delivering higher level skills to meet the needs of its high-skilled labour market. However, when compared to ASF enrolments both nationally and across other urban MSAs, data indicates that a lower proportion of enrolments are on provision at Level 3 and above in London than in other areas of England.
- **Level 3 provision offers strong support for London's priority sectors.** In 2024/25, nearly three-quarters (70%) of enrolments were on provision in a priority SSA, an increase from 47% in 2019/20. A large proportion of these were in health, public services and care, highlighting the potential role the ASF can play in addressing workforce shortages in the health and adult social care sectors.
- **Over one-quarter (27%) of enrolments on Level 3 provision were funded by the Level 3 flexibility**, supporting a wider range of learners to achieve higher level skills required to enter employment. Use of the Level 3 flexibility grew substantially in 2024/25 at 7% of all enrolments funded through flexibilities, up from 3% in the previous academic year.
- **Providers described multiple Level 3 funding pots as complex, inhibiting their ability to effectively deliver high-level provision.** Different funding rules for the Level 3 flexibility, FCfJ programme and London's FCfJ regional flexibility have created a Level 3 funding landscape that is difficult for providers to navigate.
- **A greater proportion of learners who took part in Level 3 provision reported positive economic outcomes** than those who completed learning at Level 2 and below. Reflecting the more specialist skills delivered at Level 3, over one-third (34%) of learners reported moving into employment and over one-quarter (27%) reported an increase in their income.
- **Almost all learners at Level 3 reported positive social outcomes following their course**, demonstrating the wider benefits of adult learning at all levels. Data captured through the London Learner Survey shows that 90% of learners reported increased confidence, and 80% increased wellbeing.

6.1 A high skilled, competitive labour market

Skills England estimates that one-third of extra demand in national priority sectors will require workers with Level 2 or 3 qualifications, or above.¹⁸ This need is increasingly important in the context of London's high-skilled, competitive labour market.

Subsequently, the availability of Level 3 provision plays a critical role in London's adult skills landscape by enabling residents to access these higher-level technical qualifications.

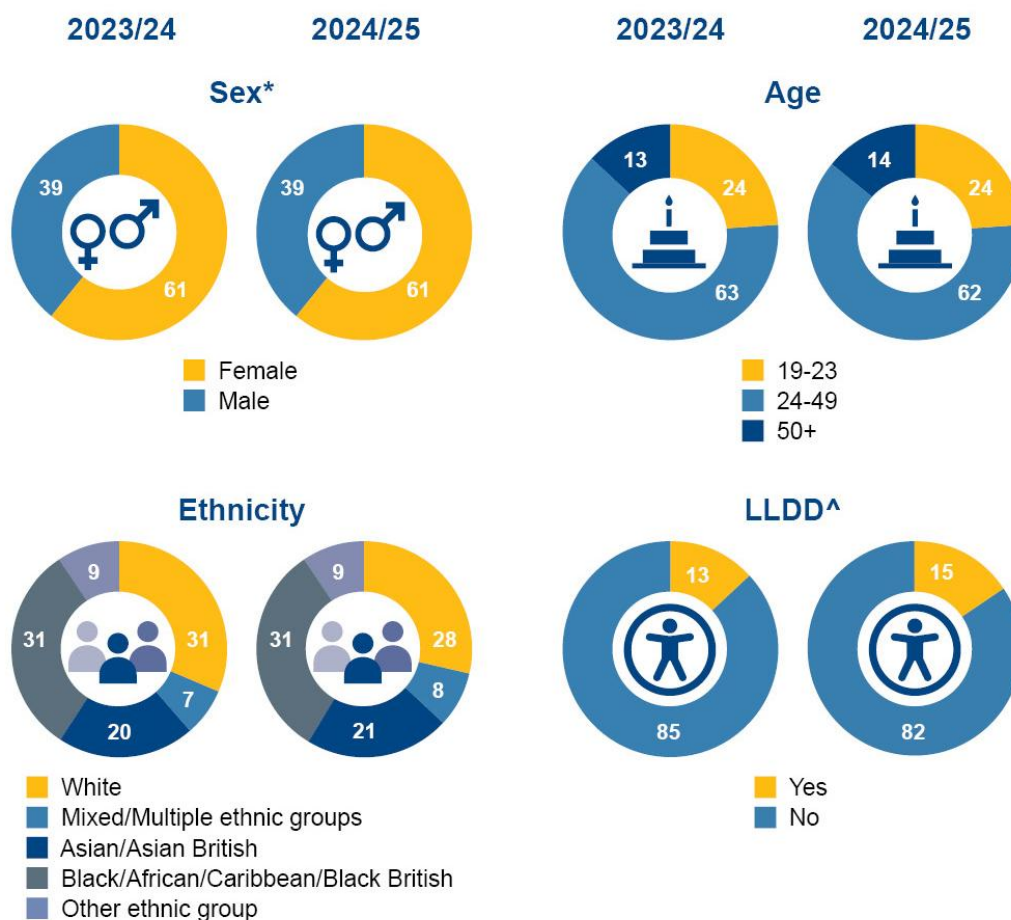
In recognition of London's high-skilled labour market, the Skills Roadmap for London sets out the Mayor's ambition for an inclusive Level 3 and above offer, delivered through the ASF. This ambition aims to support Londoners to access higher paying jobs, lowering the high prevalence of in-work poverty experienced in London, and ensuring employers have a stable talent pipeline.

6.2 Who is taking part?

Provision at Level 3 and above continues to engage a diverse range of Londoners, indicating support for underserved communities to develop skills and gain qualifications needed to improve their employability. Figure 6-1 outlines the demographics of learners who engaged in provision at Level 3 and above in 2024/25 and shows:

- a higher proportion of learners (24%) were aged 19–23 than observed across other levels of ASF provision, while provision up to Level 3 engaged the lowest proportion of learners aged 50+; and
- over two-thirds (69%) of learners were from ethnic minority backgrounds, evidencing a successful, inclusive Level 3 and above offer.

¹⁸ [Assessment of priority skills to 2030](#) | Skills England

Figure 6-1: Demographics of learners who participated in provision at Level 3 and above in 2024/25

* Based on self-declaration by the learner of 'legal sex'

[^] Based on self-declaration by the learner

Source: ILR 2023/24 R14; 2024/25, R14

6.3 Enrolments at Level 3 and above

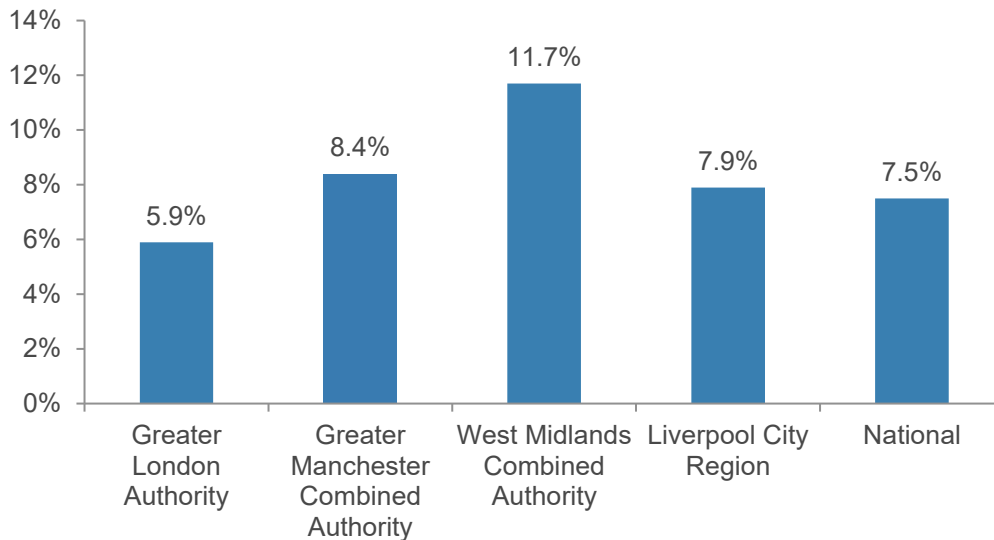
Reflecting the GLA's increasing focus on ensuring Londoners have high level qualifications, enrolments in provision at Level 3 and above have increased each year since delegation. In the 2024/25 academic year there were a total of 16,770 enrolments on provision at these levels, accounting for around 6% of all enrolments. This is up from 1% in 2019/20, and 4% in the previous academic year. Of these, almost all (97%) were enrolments in Level 3 provision.

In response to the provider survey, 24 out of 59 providers agreed that Mayoral strategic priorities had directly influenced them to develop clearer pathways for learners to progress into higher level learning.

This increase in provision at Level 3 and above demonstrates a growing contribution of the ASF to meeting the higher-level skills needs of employers in the capital. Additionally, this indicates an increasing proportion of Londoners are developing higher level skills.

Despite this positive trend, data from DfE's Education and Training dashboard indicates that the proportion of enrolments at Level 3 and above is higher both nationally and in other MSAs, than observed in London. Figure 6-2 shows that nationally, 8% of all ASF enrolments were on provision at Level 3 and above, while other MSAs reached up to 12% of enrolments at this level.

Figure 6-2: Proportion of all ASF enrolments at Level 3 and above in London, with comparison to other urban MSAs¹⁵



Source: DfE Education and Training dashboard, 2024/25

6.3.1 Level 3 enrolments by SSA

Since delegation, enrolments in Level 3 provision have demonstrated increasing alignment to London's priority sectors. In 2024/25, over two-thirds (70%) of Level 3 enrolments were in SSAs aligned to GLA priority sectors, up from 47% in 2019/20.

Similar to provision at Level 2, enrolments in the health, public services and care SSA accounted for the highest proportion of Level 3 enrolments (41%). Combined, this demonstrates London's ASF is generating successful progression opportunities for learners into higher level education, delivering important skills required for employment in the health and social care sector.

Developing the relevant skills to support entry into the health and social care sector is a key achievement of London's ASF. Analysis conducted by the King's Fund shows that NHS workforce shortages remain a persistent challenge,¹⁹ particularly in London,²⁰ negatively impacting the care needs of the population. Similarly, Care England identified

¹⁹ [NHS Workforce in a nutshell](#) | The King's Fund

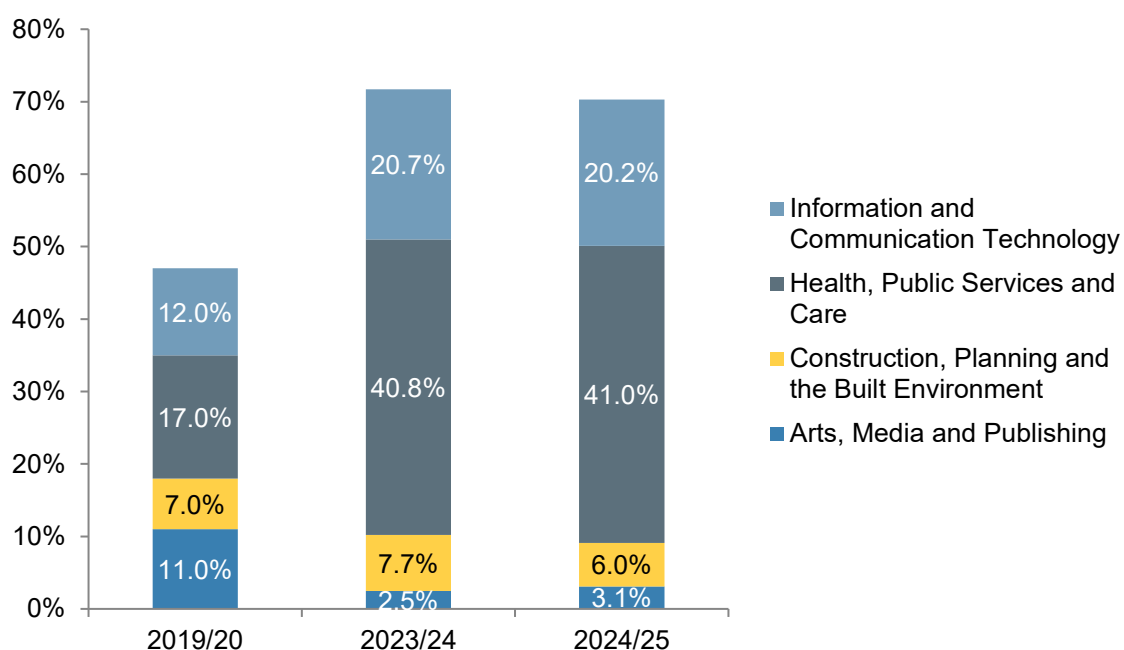
²⁰ [Staff Shortages](#) | The King's Fund

that high numbers of vacancies within the adult social care sector continue to exacerbate pressures on frontline staff.²¹

Figure 6-3 shows the proportion of Level 3 enrolments in the four priority SSAs in 2019/20, 2023/24 and 2024/25. Across other priority SSAs:

- 20% of enrolments were in the information and communication technology (20%) SSA;
- 6% were in construction, planning and the build environment; and
- 3% were arts, media and publishing.

Figure 6-3: SSA of Level 3 enrolments in the 2019/20 and 2024/25 academic years



Source: ILR 2019/20 R14; 2023/24 R14; 2024/25 R14

6.3.2 Level 3 regional flexibility

In recognition of the breadth of industry in London, the GLA introduced the Level 3 regional flexibility in the 2021/22 academic year. This flexibility expanded DfE's Level 3 legal entitlement to include all Level 3 qualifications, enabling Londoners to engage in a wider range of high-level courses, supporting both upskilling and reskilling to drive growth in London's economy. This flexibility was introduced as part of London's COVID-19 recovery, prior to the introduction of FCfJ funding nationally (outlined in section 6.3.3).

In 2024/25, over one-quarter (28%) of Level 3 enrolments in London were funded through the flexibility, an increase from 21% in the previous academic year. Notably, in 2024/25,

²¹ [Care England Warns of Unsustainable Workforce Pressures in Adult Social Care](#) | Care England

7% of all enrolments funded by a flexibility were funded by the Level 3 flexibility. This is a substantial increase from 3% in the previous academic year, demonstrating providers' responsiveness to the GLA's increasing focus on Level 3 qualifications.

In interviews, providers gave examples of how they are increasing sustained engagement with Level 3 provision through their partnership networks. For example, they discussed learners making use of the Level 3 flexibility, who have work experience in priority sectors but have international qualifications that are not recognised in the UK. Often, these learners are ready to work but require a UK qualification and support to develop their language skills. In these situations, providers enrolled learners on Level 3 provision, and connected learners with other providers delivering ESOL and Functional Skills qualifications.

The Level 3 flexibility supports inclusive growth in London, and enables learners from a range of backgrounds into high-level provision. In the 2024/25 academic year, a diverse range of learners benefitted from the flexibility:

- Over one-quarter (28%) were either aged 19–23, or aged 50+.
- Almost two-thirds (64%) were female.
- Over two-thirds (67%) were from ethnic minority backgrounds.

While recognising the importance of higher level skills in London's context, there was some concern from adult education representatives that increased focus on Level 3 provision would detract from the importance of qualifications up to Level 2 for underserved groups, who are often disproportionately impacted by skills disparities. They explained that courses such as ESOL (particularly at Entry Level) are important progression pathways into higher level learning, and are at risk of being cut due to changing priorities and increasing funding pressures. They suggested these priorities remain carefully balanced throughout the rollout of the Inclusive Talent Strategy to ensure growth in London is inclusive.

"It's a common conversation now, rationing the provision... If there's a very clear desire that we're delivering more at Level 3, 4 and 5, then something's got to give. If you want to do that, you can't also do other things... so you can easily see ESOL being squeezed, and other Entry Level provision, which is a concern, because those courses as a progression pathway has always been absolutely key."

Adult Education Representative

6.3.3 Free Courses for Jobs

Free Courses for Jobs (FCfJ) is a UK Government initiative funding Level 3 qualifications for eligible individuals in a range of subject areas that are documented to: meet the needs

of employers; improve job prospects; and earn higher wages.²² Courses delivered through the programme attract an uplift of either £150 or £600 to encourage delivery in national priority areas.

Providers' FCfJ allocations are ringfenced, with providers only able to use this funding on relevant provision to eligible learners. However, in recognition of the wider range and higher level of skills required in London's labour market, the GLA allows providers to deliver up to 50% of their FCfJ provision through their FCfJ regional flexibility. This offers an extended list of courses that can be delivered using FCfJ funding. Courses delivered through this flexibility, however, do not attract the same funding uplift as those from the national qualification list do.

To ensure providers maximise the use of their FCfJ funding allocations, deliver courses in line with national and regional priorities, and attract funding uplifts to better support learners, the GLA encourages providers to use their FCfJ funding before delivering through the Level 3 flexibility. Reflecting this, the majority of Level 3 enrolments were on FCfJ provision in the 2024/25 academic year, accounting for almost two-thirds (61%) of all Level 3 enrolments.

Generally, interviews with providers spoke positively of the FCfJ programme and valued that it enabled them to deliver more Level 3 qualifications. Several thought that the higher-level skills delivered through FCfJ supported learners into more sustainable education and employment outcomes.

Despite this, providers felt that there could be more flexibility in the Level 3 funding pots available to them to ensure they are able to maximise their use of their ASF allocations, and deliver the skills needed to support London's economy. Providers outlined that both conflicting and overlapping eligibility and funding rules between the Level 3 flexibility, FCfJ and the GLA's FCfJ regional flexibility created a complex Level 3 offer in London, making them feel they are unable to maximise their Level 3 allocations.

Instead, with more autonomy providers felt they would be better able to deliver the most relevant provision for local learners and employers, and in so doing drive greater spend within their Level 3 allocation and greater levels of economic outcomes.

"There is a little bit of frustration around the number of pots we have for funding... each comes with their own conditions and boundaries. It would be nice for us to have that overall decision making on how we use it."

Further Education College

²² These are accounting and finance; building and construction; childcare and early years; digital; health and social care; and transportation operations and maintenance.

6.3.4 Level 4 flexibility

In recognition that London's economy requires a higher-level skills offer, the GLA introduced the Level 4 flexibility for GLA priority areas. All 470 enrolments on Level 4 provision were funded through the flexibility. In 2024/25, there were 150 additional enrolments on Level 4 provision compared to the previous academic year.

Similar to the Level 3 flexibility, learner demographics of those funded by the Level 4 flexibility in 2024/25 demonstrates the importance of the flexibility in enabling Londoners from diverse backgrounds into high-level provision. Of the 390 learners who participated in Level 4 provision, 340 were female and 220 were from ethnic minority backgrounds.

6.4 Outcomes

Provision at Level 3 and above aims to deliver skills and qualifications directly relevant to the needs of employers and develop progression routes into employment. Additionally, it aims to enable in-work progression. Reflecting this, learners who participated in Learning at Level 3 reported greater economic outcomes than learners at lower levels.

LLS data captured economic and social outcomes from learners who engaged in Level 3 provision. Among learners:

- 50% reported a positive economic outcome, a higher proportion than seen at lower levels of provision; and,
- 95% reported a positive social outcome.

In focus: Preparing for employment in London's digital sector

A focus group discussion with learners enrolled on Level 3 UX/UI courses illustrated how higher-level ASF provision can support employability in London's highly competitive digital sector.

Learners joined the course with experience of work in a range of sectors, including digital, hospitality and performing arts. When discussing their motivations to join the course, employment and progression were the most common drivers. Among those without experience in digital, some said they wanted better stability in their career, and saw digital as the right sector to offer this, while those who had experience wanted to develop new skills to be able to take on new roles within the sector.

"I decided to change my career, because it was getting a little bit unpredictable... I wanted to try and find some stable income."

Learners rated the content of their courses highly and said they struck the right balance of theory and practical skills. Practical projects were praised for providing exposure to up-to-date design tools and techniques, while the grounding theory was seen as useful to build understanding of how to create a positive user experience, particularly among those without experience of the sector. Learners also agreed that the part-time structure of the course and accompanying wraparound support were key enablers to engagement. Each learner said they would recommend the course.

The discussion identified a range of social and economic outcomes among learners. All felt that the course had a direct impact on their wellbeing, which they attributed to the confidence they

had gained throughout the course and through peer interaction. This was particularly important among learners who were unemployed prior to joining the course, and who had experienced frequent rejection from employers causing them to feel a career in digital would not be possible.

Learners also felt the course delivered the specific skills employers in the sector need, which has supported their understanding of job adverts they are applying to. This has developed their confidence in their applications, which they said will feed into their interviews.

"The course was covering what employers were looking for."

Learners also expressed interest in developing specialist knowledge within the sector to improve their employability further. This included looking at entry positions and internships, as well as considering targeted and specialist bootcamps in design tools and programming languages, such as Figma, HTML or CSS.

"Now I'm seeing almost every element of a job advert, I understand what they're asking for. I don't have the experience, but I know what I need to do to get there."

6.4.1 Economic outcomes

Following engagement in Level 3 provision, a higher proportion of learners reported movement into employment and an increase in income than learners on provision up to Level 2. This demonstrates the increased employability Level 3 qualifications provides and evidences their importance in London's labour market.

Figure 6-4 shows that among learners at Level 3, over two-thirds (34%) moved into employment, and over a quarter (27%) reported an increase in income. Additionally, progression into further learning remains strong among learners who engaged in Level 3 provision.

6.4.2 Social outcomes

While the primary focus of Level 3 provision is to support entry into and progression in work, learners on provision at Level 3 reported social outcomes at similar rates to learners on other levels of provision. Notably:

- 80% of Level 3 learners reported a positive impact on wellbeing following on from participation;
- 90% reported a positive impact on their confidence; and
- 73% reported their course helped them meet new people.

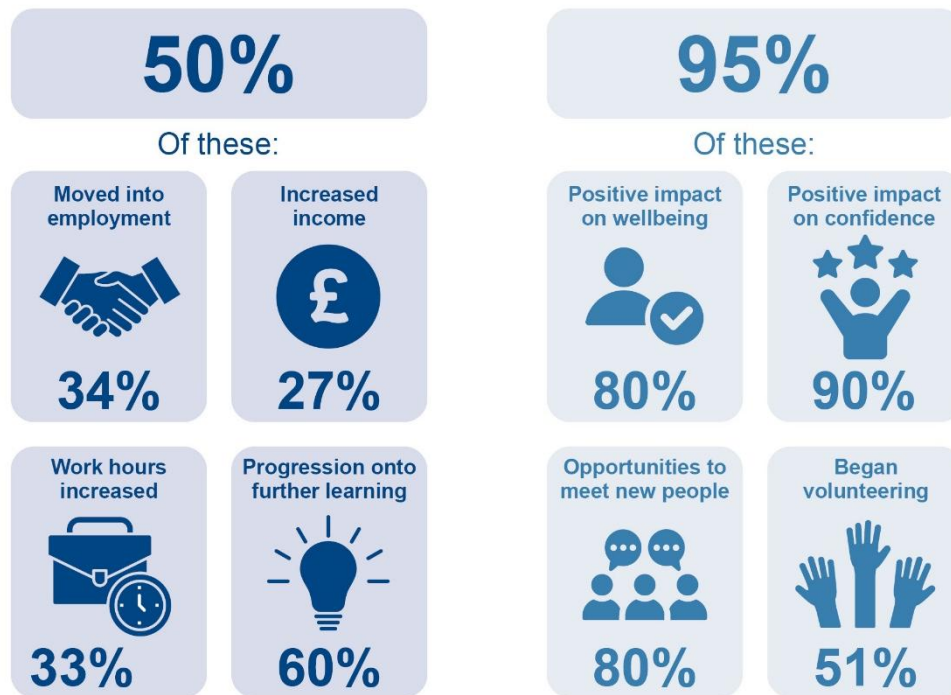
Social outcomes achieved by learners on provision at Level 3 is displayed in Figure 6-4.

A focus group with learners studying a mix of ICT courses at Level 3 outlined a range of ways in which their confidence had increased as a result of their course. Group work and presentations had a positive influence on their ability to speak in front of larger groups of people, which they felt would benefit them in job interviews. Additionally, some learners who were exploring self-employment said that their course had provided them with the knowledge to speak confidently about their capabilities.

“Being able to present to the class, and to speak well, and clearly, for them to understand, that’s one thing I struggled with before the course.”

ASF learner

Figure 6-4: Economic and social outcomes achieved by ASF learners on Level 3 provision in the 2024/25 academic year



Source: London Learner Survey, 2024/25

6.5 Conclusion

Recognising the needs of the high skilled labour market, a key ambition of the Skills Roadmap for London was to lift Londoners out of low paid work through the delivery of higher-level skills. In the 2024/25 academic year the GLA’s ASF demonstrated a growing contribution to this ambition, with provision at Level 3 and above accounting for its largest proportion of enrolments since delegation. At this level, the ASF continues to engage a diverse range of learners, with the majority of enrolments in SSAs directly supporting London’s priority sectors.

Outcomes achieved by learners who participated in provision at Level 3 and above remain broad. At this level, the ASF delivers economic outcomes at a higher rate than other levels, indicating successful alignment between the provision London’s ASF providers offer and the high skill needs of employers. In addition, evidencing the importance of continued learning, provision at Level 3 and above continues to support learners’ confidence, wellbeing and social integration.

Despite these successes, as a proportion of enrolments, Level 3 provision in London is lower than nationally and in other MSAs. A key contributor to this is the complex Level 3

funding landscape in London. Overlapping funding rules between programmes and flexibilities prevents providers from maximising the effectiveness of their Level 3 provision, preventing the delegated ASF from supporting Londoners to reach their full potential. To avoid this, a simplified Level 3 offer is required to ensure providers can effectively support a wide range of residents into high level provision and high-skilled work.

7 Jobs and Skills for Londoners

This chapter sets out the aims of the Jobs and Skills for Londoners (JSfL) programme in 2024/25, and outlines who enrolled in the provision, the types of learning Londoners enrolled on, and the outcomes they achieved following participation.

Chapter summary

- **The JSfL programme engaged a diverse range of learners.** Across sectors, there were notable differences in participant demographics. For example, there was a higher proportion of younger learners on creative, green and digital courses than other courses, while there were higher participation rates among learners from ethnic minority backgrounds on digital and hospitality courses.
- **At over 68,300 enrolments, the programme exceeded its enrolments target in its first two years.** However, over 1000 fewer unique learners participated than expected, suggesting a larger number of learners were completing multiple JSfL courses than anticipated. This provides an early indication the programme is not supporting job outcomes as intended.
- **Around half (51%) of enrolments were in priority sectors.** Health represented the largest single priority sector area, accounting for around one-quarter (23%) of all enrolments. Despite this, no priority sectors achieved their enrolment targets. Green achieved the lowest proportion of its target, at 40%, while health achieved the largest, at 90%.
- **Around half (51%) of JSfL learners reported a positive economic outcome** through the 2024/25 London Learner Survey. Among these, over one-third reported moving into employment, while over half (53%) progressed into further learning.
- **Almost all (90%) of JSfL learners reported positive social outcomes.** Of these, 84% reported increased confidence and 72% said their wellbeing had improved.
- **Of the £76m allocated across its first two years, the JSfL programme had a total underspend of £5.9m.**

7.1 About Jobs and Skills for Londoners

The JSfL programme was introduced in 2022 as a direct response to multiple pressures that had impacted economic activity in London, including Brexit, the COVID-19 pandemic and the cost-of-living crisis, among others. The programme aimed to support each pillar of the Skills Roadmap for London by:

- delivering a range of accessible provision, aimed at Londoners who experience persistent inequalities;
- designing provision with employers, enabling the programme to support Londoners into good jobs; and
- aligning provision to London's priority sectors, ensuring courses are locally relevant and prioritising sectors key to London's recovery.

Reflecting the programme's focus on supporting entry to and progression within employment, the programme aimed to support at least 20% of JSfL learners into 'good work'. This was defined as employment expected to last at least four weeks at a minimum of 16 hours per week, pay at least the London Living Wage, and that does not use zero-hour contracts. On the achievement of a successful job outcome providers are able to claim a £400 outcome payment, which should be used to fund additional activity to support individuals into employment, apprenticeships or paid work placements.

Delivery of the JSfL programme began in the 2023/24 academic year, and will end in July 2026. This three-year programme will be replaced by the London Talent Pathways from 2026/27 onwards.

Across its three-years, the GLA committed £114m of funding to programme. The programme accounted for around 10% of the GLA's ASF expenditure in the 2024/25 academic year. JSfL allocations are awarded through a competitive grant process and make up the open procurement element of the ASF. The majority of providers who deliver courses utilising this funding are Independent Training Providers.

7.2 Who is taking part

In support of the Skills Roadmap, the JSfL programme aimed to engage learners from underserved communities and those most negatively impacted by skills disparities. This includes learners from ethnic minority backgrounds, those aged 19–23 or 50+ and those with disabilities and/or health conditions.

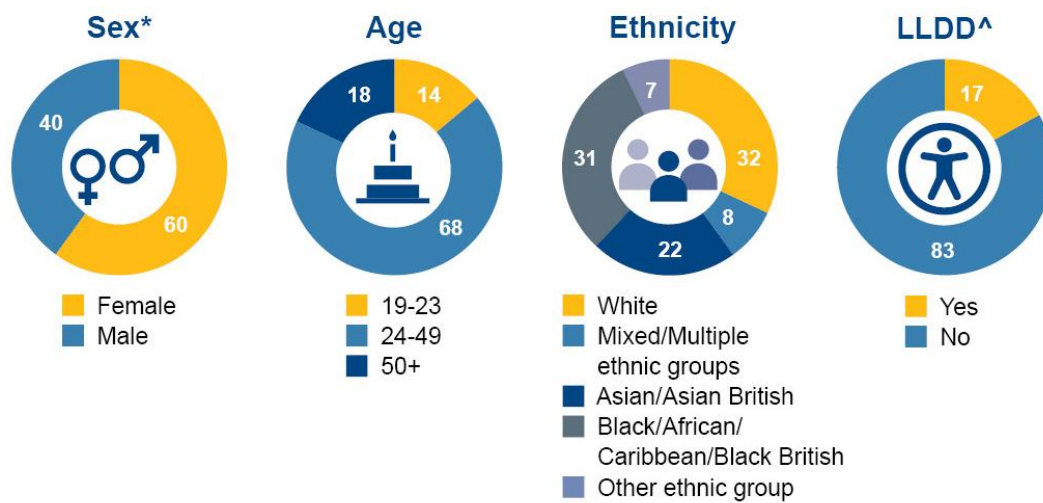
Figure 7-1 outlines the demographics of learners who participated in the JSfL programme in its first two years of delivery, and demonstrates the programme's success engaging target learner groups. In particular:

- over two-thirds (69%) of learners were from ethnic minority backgrounds; and
- nearly two-fifths (17%) of learners had a learning difficulty, disability and/or health condition.

Despite these successes, participation among learners aged 50+ was much lower than other areas of the ASF. While across London's ASF over one-quarter of learners (28%) were aged 50+, this age group accounted for fewer than one-fifth (18%) of learners on JSfL provision. This reflects evidence from the Centre for Aging Better (CfAB) which shows that engagement among people aged 50+ in employment support services is lower than those under 50. CfAB identified that a lack of awareness of where and how to access support and a belief that services were not for people of their age were the largest inhibitors of engagement. This suggests that a targeted outreach approach is required in order to engage older Londoners in provision more closely linked to employment.²³

²³ [Written evidence from the Centre for Aging Better](#) | Centre for Aging Better

Figure 7-1: Demographics of learners who participated in JSfL across the programme's first two years of delivery



* Based on self-declaration by the learner of 'legal sex'

^ Based on self-declaration by the learner

Source: ILR 2023/24, R14; 2024/25, R14

Learner demographics varied across sectors, reflecting the broader composition of sector workforces. Notably:

- learners aged 19–23 accounted for a larger proportion of participation in creative (25%) and green (20%) courses, while learners aged 50+ made up a larger proportion of participation in hospitality (20%) courses;
- equal proportions of learners aged 19–23 and 50+ participated in digital courses (20% each);
- digital and hospitality courses had higher participation rates among learners from ethnic minority backgrounds (71% and 73%, respectively); and
- learners with learning difficulties, health conditions and/or disabilities accounted for a higher proportion of enrolments in green (22%), creative (21%) and digital (18%) courses.

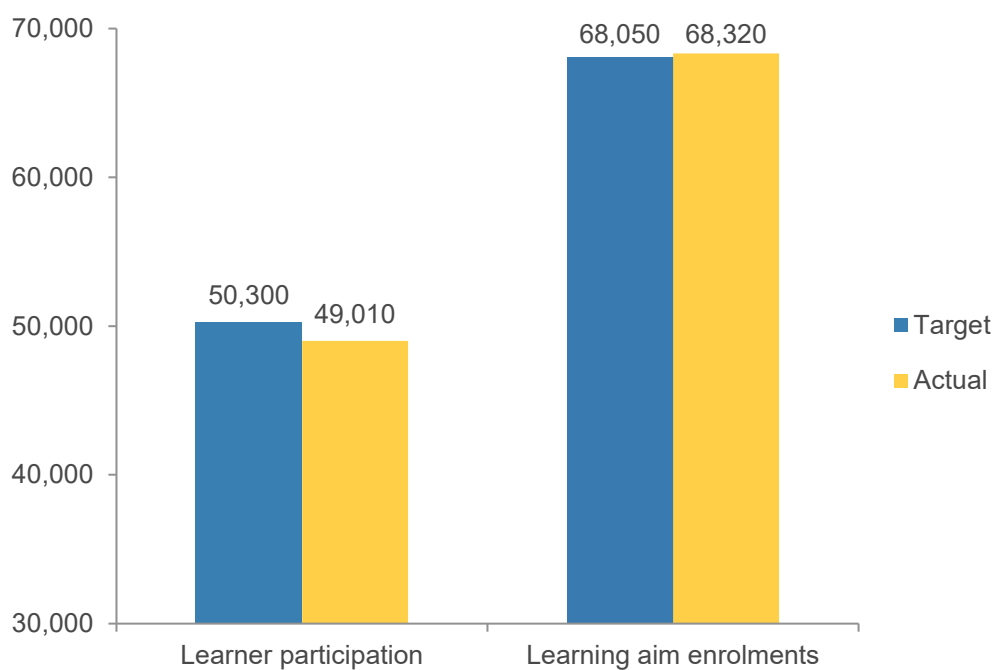
7.3 Enrolments on JSfL provision

Across its first two years, the JSfL programme aimed to engage a total of 50,300 learners through 68,050 learning aims. Figure 7-2 shows that the programme delivered to over 1,000 fewer learners than anticipated but exceeded its target number of learning aims to be delivered.

While achievement of the learning aim enrolment target is positive, fewer learners engaging in more JSfL courses may indicate that they may not be achieving 'good work' outcomes at the rate anticipated by the programme. This was suggested by providers in interviews, who shared that the JSfL programme offered a stepping stone toward employment for a considerable proportion of learners. This was particularly prominent for

learners who were unemployed. Subsequently, learners often took part in multiple JSfL courses to continue preparing for employment.

Figure 7-2: Total JSfL participation and enrolment targets vs. actual delivery across the programme's first two years of delivery



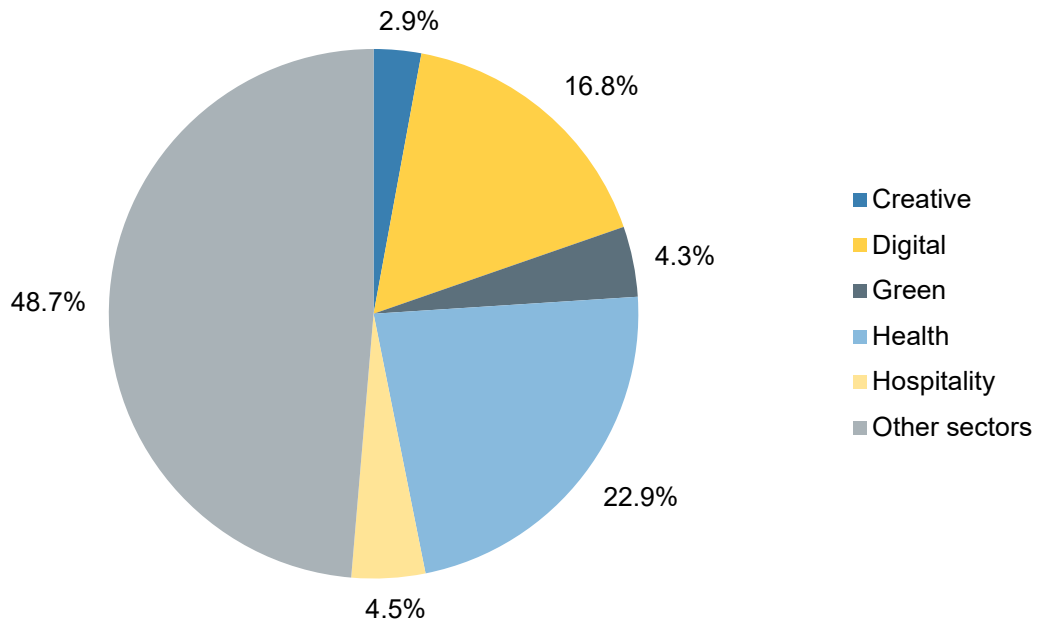
Source: ILR 2023/24, R14; 2024/25, R14

7.3.1 Enrolments by sector

To meet the JSfL programme's aim to support both the ambition of the Skills Roadmap and London's recovery, the programme prioritised sectors key to London's economy. ILR data shows that half (51%) of JSfL enrolments were on provision in one of the five key priority sectors.

Figure 7-3 displays the proportion of enrolments by sector and shows that:

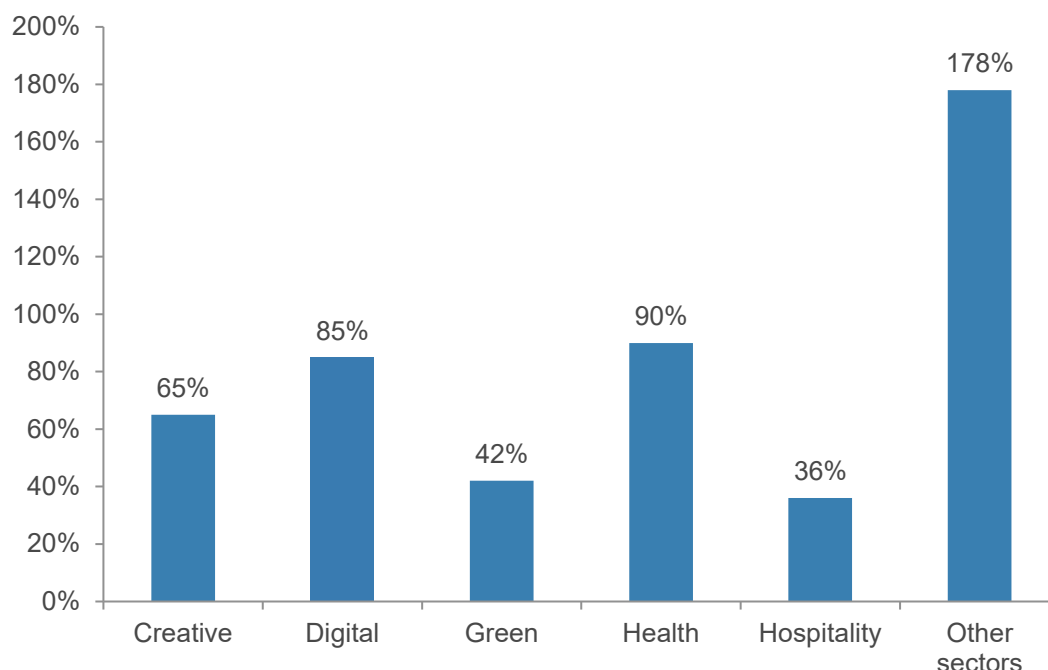
- almost one-quarter (23%) of JSfL enrolments were in health courses, the largest of any priority sector;
- just below one-fifth (17%) of enrolments were in digital courses; and
- enrolments in creative, green and hospitality courses accounted for just over one in ten (12%) of JSfL enrolments.

Figure 7-3: JSfL enrolments by sector across the programme's first two-years of delivery

Source: ILR 2023/24, R14; 2024/25, R14

Despite half of enrolments being on priority sector courses, ILR data shows that the programme did not achieve its learning aim enrolment targets across all five priority sectors. Figure 7-4 shows that achievement rates ranged from 36% in hospitality, to 90% in health. Reflecting this, enrolments in JSfL courses in other sectors reached 178% of their target.

Lower rates of delivery across the five key priority sectors (than anticipated in the first two years of JSfL delivery) offers an early indication that the programme is not supporting London's priority sectors as intended.

Figure 7-4: JSfL enrolment target achievement rate by sector across the first two years

Source: ILR 2023/24, R14; 2024/25, R14

7.4 Course design

When discussing the responsiveness of JSfL provision to the needs of employers, providers shared examples of co-design with employers to ensure courses delivered relevant and in-demand skills. These included convening employer panels to discuss persistent and emerging skills needs within their sector and embedding employer feedback into course design.

Providers delivering digital skills provision commented on the rapidly changing landscape and skill requirements of employers, and noted that provision can quickly become out of date. To manage this, some providers had established partnerships with large employers in the digital sector who were able to share knowledge to support better forward planning. Employers who did not have these partnerships called for greater provider involvement in the employer boards being established by the GLA to fill this gap.

“In tech, one day you can be teaching something and then two months later the need has changed again... Working with a large tech organisation is our greatest strength. They share the roadmap with us, and so for the next four years we can plan our curriculum based on that.”

Independent Training Provider

As many Independent Training Providers deliver provision across England, interviews explored providers' experiences of delivering in London compared to other MSAs. While the relationship and support provided by the GLA was identified as a key success of London's ASF, providers felt that decision-making and approval processes took longer in

London than in other devolved areas. This has directly impacted the success of partnership working between providers and employers.

“We were waiting a long time to get funding for a particular course approved... and I think when you’re partnering with a large organisation, they don’t have the patience... we’re constantly trying to juggle that partnership and the GLA processes carefully.”

Independent Training Provider

7.5 Learner outcomes

Reflecting the JSfL programme’s focus on supporting learners to achieve employment outcomes, a higher proportion of learners who engaged with JSfL provision in 2023/24 achieved positive economic outcomes compared to learners on provision at other levels, excluding Level 3.

In addition to this, reflecting the importance and wider benefits of adult learning, almost all learners who engaged in this provision reported achieving positive social outcomes following their engagement.

7.5.1 Job outcomes

As of March 2026 over 32,800 learners had completed a JSfL course, of which one in ten (10%) achieved a good work outcome. While this offers indicative evidence the JSfL programme is not supporting job outcomes as anticipated, it is important to consider the wider context in which the programme has been delivered.

On commencement of the programme London’s unemployment rate was 5%, however rose to 6.1% by the end of the 2024/25 academic year, indicating an increasingly challenging economic climate.²⁴ Furthering this, rising unemployment has disproportionately affected particular groups within the population. For example, unemployment among 16-24-year-olds rose from 14.6% to 18.2% across the same period.²⁵ This economic climate has direct impacts on the success of the programme and outcomes in specific sectors and for specific groups, for example UKHospitality estimates around 39% of the hospitality workforce is under 25.²⁶

In addition, interviews with providers highlighted the challenges learners experience securing good work outcomes, particularly in the health and hospitality sectors. Providers explained that many employers in these sectors do not pay above the London Living Wage, and therefore supporting learners into good work outcomes is not possible.

²⁴ [Unemployment rate](#) | Trust for London

²⁵ [Unemployment in key charts](#) | Greater London Authority

²⁶ [How hospitality delivers ‘socially productive growth’](#) | UKHospitality

"The GLA's definition of good work isn't relevant to the health and social care sector, it just doesn't happen in the sector. Not even the council offers care roles that pay the London Living Wage... There needs to be an understanding for the sector itself, and then we can work out what outcome flexibility is needed in each sector."

Independent Training Provider

7.5.2 Economic and social outcomes

Figure 7-5 outlines the positive social and economic outcomes achieved by learners who engaged in JSfL provision in 2024/25 and shows that half of learners (49%) reported a positive economic outcome as a result of their course. Within this:

- over one-third (34%) said they moved into employment;
- around one-quarter (23%) said their income had increased; and
- over one-quarter (28%) said their hours had increased.

LLS data captured a higher proportion of employment outcomes following engagement in JSfL provision than recorded in the ILR. When discussed in interviews, providers described the persistent challenges they face in tracking employment outcomes achieved by their learners. While some large FE providers had dedicated teams to follow-up with learners, smaller providers did not have robust mechanisms to systematically follow-up with each learner after their course. Subsequently, they relied on data from the LLS, as well as their own surveys to gather insight on learners' pathways beyond learning.

In interviews, providers explained that challenges engaging with employers and managing their expectations of learners' work histories and skillsets, are key factors contributing to low employment outcomes. Despite this, providers emphasised the important contribution of the JSfL programme to the development of learners' skills for employability.

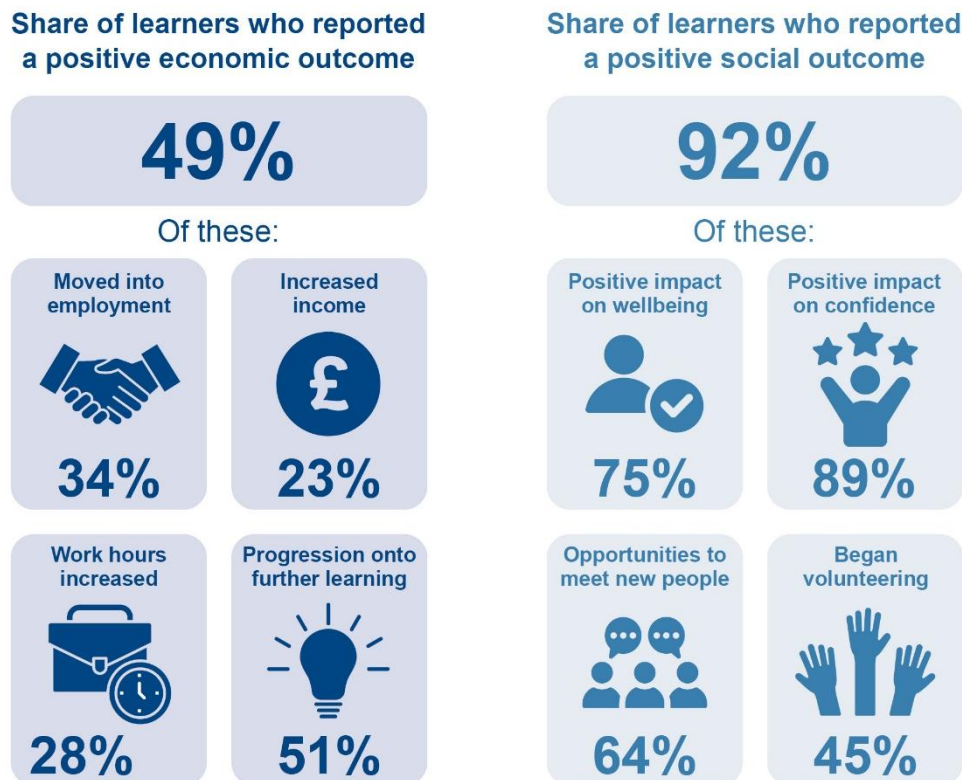
"Every single learner will have progressed somehow, some form, into being a more productive and valuable Londoner."

Independent Training Provider

When asked about social outcomes, almost all (92%) learners who took part in JSfL provision in 2024/25 reported achieving a positive social outcome following their engagement. Among learners:

- 89% reported a positive impact on their confidence;
- 75% reported a positive impact on their wellbeing; and
- over two-fifths (64%) had the opportunity to meet new people.

Figure 7-5: Economic and social outcomes achieved by ASF Learners who took part in JSfL provision in the 2024/25 academic year

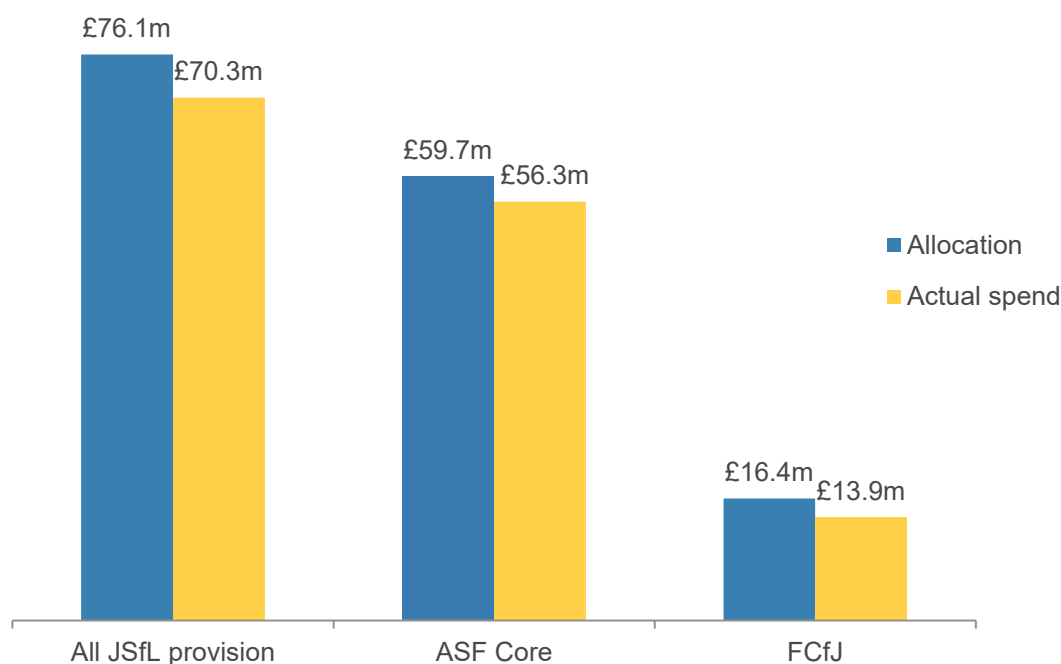


Source: London Learner Survey, 2024/25

7.6 JSfL funding and reconciliation

Across its first two years of delivery, the JSfL programme delivered £70m of its £76m allocation (92%). Figure 7-6 outlines the allocated and actual spend of JSfL provision across the programme's first two years, with a breakdown of delivery by ASF Core and FCfJ funding and shows:

- JSfL provision funded by ASF Core allocations was underspent by £3.3m, reaching 94% of its allocation; and
- provision delivered through FCfJ allocations was underspent by £2.5m, reaching 85%, of its allocation.

Figure 7-6: Total JSfL funding allocation vs. actual spend over the programme's first two years of delivery

Source: GLA reconciled financial statements, 2023/24; 2024/25

7.7 Conclusion

The JSfL programme aimed to deliver a range of accessible provision, tailored to the needs of employers in London's priority sectors, with a key aim to support residents into good work.

Across its first two years, the programme engaged fewer learners than anticipated, but delivered more learning aim enrolments. This provides an early indication that the programme is not delivering job outcomes as expected, as instead, a higher proportion of learners are taking part in multiple courses.

Additionally, while the programme demonstrated alignment to London's priority sectors, it is important to recognise that enrolments across all five priority sectors did not reach their targets. This presents challenges for employers, particularly in sectors such as hospitality and green which have achieved below half of their enrolment targets to date.

Reflecting these shortfalls, job outcomes reported via the ILR were lower than anticipated. However, outcomes reported by learners through the LLS indicated that over one-third of learners moved into employment following participation in JSfL provision.

8 Conclusions and recommendations

In the 2024/25 academic year, London's ASF achieved record engagement from underserved communities, and those who are more likely to be negatively affected by skills disparities. This is a key indication that the ASF is broadly delivering its intended objectives and is well aligned to current priorities, at both a national and London level, to reduce economic inactivity and unemployment. Despite this, the total number of learners the ASF reached fell to its lowest since 2020/21. This is a direct result of both higher funding rates introduced through funding reform, and increased economic pressures on providers which have not been accompanied by proportionate increases in the GLA's delegated ASF budget by DfE.

The GLA's approach to implementing funding reform offered providers stability during a year of transition, and demonstrated its continued commitment to ensuring Londoners can access high quality essential skills provision. A key driver of this success was the positive relationships the GLA has with its providers, developed through a supportive approach to provider management, which has equipped the GLA with an improved understanding of on-the-ground delivery of the ASF. Despite this, providers outlined the need to operate more efficiently to reduce the effects of funding reform on the number of learners they are able to support, which included expanding class sizes and restructuring internal resources.

Reflecting these challenges, the GLA's expenditure on ASF provision exceeded its total allocation from DfE for a second consecutive year. This remains unsustainable and increases risk to the number of learners the ASF is able to support, if overall funding does not increase. There is a particular risk there may be a disproportionate effect on underserved communities, inhibiting the ASF's contribution to supporting important social and economic outcomes, and inclusive growth.

Despite these challenges, the ASF in London demonstrated success in developing clear pathways into higher level provision and supporting London's priority sectors. Tailored Learning offered extensive provision in Preparation for Life and Work, supporting learners' confidence, wellbeing and social integration and developing their ability to progress into accredited learning. Learning at Entry Level and up to Level 2 built on this, continuing to deliver important social outcomes while equipping learners with foundational skills, qualifications and aptitudes required to enter employment. Notably, the higher the level of learning, the greater alignment with London's priority sectors.

Level 3 provision grew in particular, as an overall proportion of ASF enrolments in the 2024/25 academic year, a large proportion of which aligned with London's priority sectors. This demonstrates support for the higher-level skills needs of employers in the capital. While a notable success of the delegated ASF, the extent of provision at Level 3 and above in London remained below that seen both nationally, and in other urban MSAs. Providers explained that a complex Level 3 offer, driven by both conflicting and

overlapping eligibility and funding rules across multiple funding streams, prevented them from maximising the effectiveness of their Level 3 provision.

The evaluation identified examples of positive partnership working between ASF providers and employers across priority sectors, to co-design provision to meet skills needs and fill vacancies. Combined with a higher proportion of enrolments in learning related to priority sectors, this suggests that delegation of the ASF is improving the responsiveness of adult skills provision to the needs of London's labour market.

8.1 Areas for consideration and recommendations

Given the need for higher level skills in London's competitive labour market, the increasing proportion of provision being delivered at Level 3 is a key success of the ASF. However, this has come with a decrease in the proportion of provision delivered at Level 2 and below. Provision at this level is fundamental to developing Londoners' abilities to navigate daily life and providing a pathway into higher level and technical training. A careful approach to balancing provision at all levels is required in order to ensure Londoners, particularly those from underserved communities, can continue accessing important progression routes.

As the world of work rapidly evolves, limited digital skills are a growing challenge for employers and drive a considerable proportion of skills shortages. In London, enrolments on digital skills provision remain low as a proportion of essential skills enrolments. Expanding the delivery of essential digital skills should be a priority, to ensure Londoners have the necessary capabilities to move into and sustain employment. Additionally, to enable employers to operate productively and support growth in London's economy.

As strategies guiding the ASF increasingly focus on supporting Londoners to develop the skills employers need with a view to support growth in London's priority sectors, providers are developing stronger partnerships with employers to co-design and deliver provision. While several positive examples were shared throughout the evaluation, feedback indicated that the GLA's decision making and approval processes for funding rules and new flexibilities are lengthy, particularly when compared to other MSAs. This was reported to inhibit providers' abilities to be agile and had a direct impact on the success of some partnerships.

The evaluation of the GLA's ASF in the 2024/25 academic year highlights the contribution of the ASF to strategic priorities at both a national and regional level, as well as areas for development. The following recommendations are drawn from this evaluation and are essential considerations to enhance the success of the ASF.

- **Encourage providers to maintain good levels of English, maths and digital provision.** The scale of essential skills provision demonstrates strong alignment between the ASF and strategic priorities. However, enrolments in English and maths are declining, and enrolments in maths and digital provision as a proportion of essential skills delivery is considerably lower than observed nationally. To ensure the ASF continues to equip Londoners with foundational skills required to navigate daily life and access higher-level provision, delivery of these essential skills should be safeguarded.

- **Deliver a simplified, more coherent Level 3 offer.** The GLA's current Level 3 offer is complex, preventing the ASF from maximising its effectiveness at delivering the high-level skills required by London's employers. A simplified offer will enable providers to increase the effectiveness of their funding allocations, deliver more locally relevant courses and drive greater alignment between higher-level skills and local labour markets.
- **Ensure the ASF has a clear strategy for targeting both older Londoners and Londoners aged 19–23.** Combined, these groups make up around 40% of all ASF learners. This is uneven across provision however, with these groups making up one-third (32%) of JSfL participation. These groups are a key focus of ongoing strategy to reduce economic inactivity and unemployment. Therefore it is vital that there is a clear, targeted strategy to ensure Londoners engage, particularly in work-focused provision, and develop the skills needed to move towards and into employment.
- **Consider ways to improve job outcomes achieved by JSfL provision.** This may include changing funding policy so that it incentivises 'good work' outcomes while recognising and rewarding other job outcomes. Alongside this, provide additional support for providers, particularly around engaging and co-designing courses with employers committed to good work. To facilitate this, ensure provider managers are well-equipped to act as a critical friend in order to drive provider performance.

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<https://ifs.org.uk/news/increasing-concentration-high-skilled-jobs-london-means-graduates-elsewhere-cannot-fully>

Inclusive Terminology

The terminology used to define ethnicity continues to evolve, and greater awareness has arisen about gender, cognitive differences as well as of disability. IES seeks to be a learning organisation; as such we are adapting our practice in line with these shifts. We aim to be specific when referring to each individual's ethnicity and use their own self-descriptor wherever possible. Where this is not feasible, we are aligned with Race Disparity Unit (RDU) which uses the term 'ethnic minorities' to refer to all ethnic groups except white British. RDU does not use the terms BAME (black, Asian, and minority ethnic) or BME (black and minority ethnic) as these terms emphasise certain ethnic groups and exclude others. It also recommends not capitalising ethnic groups, (such as 'black' or 'white') unless that group's name includes a geographic place. More broadly, we understand that while individuals may have impairments it is society that disables them, hence we refer to disabled people. Not all people identify with male or female and we reflect their self-descriptions in our work and use the term non-binary should abbreviation be necessary. We value neurodiversity. Where possible we always use people's self-descriptors rather than impose categories upon them.

Accessibility

IES seeks to make its .pdf reports as accessible as possible and is a member of UKAAF (UK Association of Accessible Formats). Every effort is made to make our PDF reports meet the required accessibility standards, should you encounter any difficulty in accessing the information in our reports please contact: accessibility@employment-studies.co.uk