

A Market in Career? Evidence and Issues

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This paper, originally prepared for the Department for Education and Skills (DfES) Engaging Adults in Learning Unit, examines the potential application of market principles to the delivery of career guidance in the UK. In particular, it explores the extent to which this could be an effective means of meeting the public interest in expanding provision without making excessive demands on the public purse. The paper includes a review of the international context, a historical review of relevant policy in the UK, and the results of an initial mapping of the current UK market in career guidance provision. The paper was discussed at an invitational consultation event held in March 2005: a summary of the main points from the discussions at this event are included in an annex.

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1. Markets and public policy: the international context

1.1 Market-based models of delivery can be defined as including any or all of the following:

- Fee-charged services offered by public-sector organisations.
- Government-financed services which are contracted out to the private (for-profit) and voluntary (not-for-profit) sectors.
- Services in the voluntary sector which are financed not by government but by other sources (including charities, private-sector organisations, and end-users).
- Services in the private sector, which are financed by end-users or by non-government third parties (e.g. employers).

1.2 The OECD Career Guidance Policy Review (OECD, 2004) defined career guidance as covering services intended to assist people, of any age and at any point throughout their lives, to make educational, training and occupational choices and to manage their careers. It indicated that a key public-policy issue was to clarify the role of markets in career guidance provision. It noted that public policies based on the notion that career guidance is both a private and a public good could seek to work at least in part through the market.

1.3 The OECD review reported that there were two areas of career guidance provision where markets were reasonably vibrant:

- Publication of career information and other careers materials.
- Outplacement agencies, which commonly include career counselling.

A substantial market also existed for private employment agencies, though these generally offered only limited career guidance services. In addition, the report noted that in some countries (including Australia, Canada, Germany, the Netherlands and Norway) a limited market had also developed for career guidance services paid for by individuals.

1.4 In general, however, OECD concluded that individuals appeared to be reluctant to pay for career guidance – or at least reluctant to pay at full-cost rather than marginal-cost rates. It suggested that this might be viewed as a transitional problem, based on the fact that users have been accustomed to such services being free of charge and that it takes time for them to adapt to market-based provision. Alternatively, it could be viewed as a systemic problem, based on the difficulties of treating career guidance as a commodity in the ways

a market would require (see Watts, 1999).

1.5 There are several reasons why career guidance is hard to handle through private markets (Grubb, 2004). Both supply and demand are difficult to specify and define: service providers are often not able to agree on how to describe the services they offer. In addition, career guidance is highly variable in nature, and is often subsumed within other services such as education and job placement. Personal interviews, which to date have been the main delivery method of career guidance, are hard to standardise and to associate with economies of scale. For some needs, acceptable alternatives such as self-help tools on websites are available free of charge. Finally, many of the individuals who most need personal career guidance are least able to afford to pay for it, and least likely to be willing to do so.

1.6 On the other hand, OECD (2004) suggested that the wider adoption of market-based funding methods could allow those who can afford it to make a financial contribution towards the costs of the services that they need, and for government funds to be concentrated mainly upon those least able to pay. This indicates that governments should consider what steps they might take to encourage the wider use of private markets in the provision of career guidance. OECD outlined three possible roles for government in this respect:

- Stimulating the market in order to build its capacity.
- Regulating the market and assuring the quality of services, both to protect the public interest and to build consumer confidence.
- Compensating for market failure where this is appropriate.

1.7 In terms of stimulating the market, one measure noted by OECD (2004) was to subcontract publicly-funded career guidance services which remained free at the point of delivery. This can be done either on a contract basis, in which contracts for services to stated groups are allocated to specific providers, or on a voucher basis, in which individuals are able to choose between a range of accredited providers. In countries like Australia and the Netherlands, such subcontracting has resulted in a considerable boost to the private and voluntary sectors.

1.8 A further such measure mentioned by OECD was through individual learning accounts designed to encourage joint investment in learning by individuals, by employers and by the state. Experiments in such accounts have been launched in a number of countries, including Belgium, the Netherlands and the UK (see para.2.10 below). In these cases, there are strong arguments in favour of these accounts being able to be used to purchase career guidance.

1.9 On regulating the market, the strongest model is in Canada (Quebec), where the titles of ‘career counsellor’ and ‘guidance counsellor’ are protected by law. Other countries, however, have developed quality standards designed to assure quality and protect the interests of users (OECD, 2004, pp.132-135) (see para.2.8 below).

1.10 It seems likely that any market in career guidance would be most fully developed in the USA, a country not covered by the OECD review. A report by Hughes & Gray (2004), based on a study-visit to the east coast, suggested that career professionals in private practice constituted a lucrative market in the USA (though no evidence was available on the extent of this market). The extent to which individuals were prepared to pay for career guidance varied, depending on five factors: (i) the target audience; (ii) the targeted service; (iii) the branding and marketing arrangements; (iv) the training arrangements for the professionals concerned; and (v) the payment arrangements. Particularly buoyant opportunities appeared to exist among senior executives (which tended to reject public-sector services as being designed for the unemployed) and among college alumni. Financial institutions were offering a new niche market, based on helping unemployed people to return more quickly to the labour market and so reduce revenue loss to the insurer. Some organisations focused solely on working through intermediaries like employers and colleges, to avoid the transaction costs of collecting payments from individuals. Public policy, however, has not been significant in this field in the USA, and is complicated by state autonomy: arrangements vary considerably across different states.

2. UK policy: a historical review

2.1 *Early moves.* Traditionally, in the UK as in most other countries, career guidance services have been viewed as part of public-sector social-welfare provision (Watts, 1996). As part of the wider interest in using market methods to run public services, significant moves towards the application of market principles to career guidance delivery were made under the Conservative Governments of the early and mid-1990s, urged on by, in particular, the Confederation of British Industry. Conceptually, this took two main forms (Watts, 1995):

- The concept of ‘guidance as market-maker’: a means of making the labour market, and the education and training market, work more effectively by ensuring that the supply-side actors within these markets have access to market information and are able to read market signals (see especially CBI, 1989).
- The concept of a ‘market in guidance’: seeking to improve the quality of guidance services by applying market or quasi-market principles to their delivery (see CBI, 1993).

Watts (1995) argued that the demands of the former were logically superordinate, and that the notion of a market or quasi-market in guidance should be supported only to the extent that it met these demands.

2.2 *Marketisation of the Careers Service.* The major step taken by the Conservative Government in this period was to remove the Careers Service from the mandatory control of Local Education Authorities and, in England and Wales, to adopt competitive tendering for the provision of careers services. Most contracts went to various forms of partnership between LEAs and Training and Enterprise Councils, but some went to voluntary-sector and private-sector organisations. In general, the process of marketisation was handled much more successfully in England and Wales (Hemsley-Brown & Foskett, 1998) than in the Netherlands (Meijers, 2001; OECD, 2002).

2.3 While the contracts were concerned with providing a free service to individuals within the statutory client-group (see para.3.1 below), part of the Government’s intention was to encourage enterprise among careers services in developing services, on a fee-charged or separately funded basis, for individuals outside this group. Statements made by Ministers during the debates on the Trade Union Reform and Employment Rights Act 1993 included references to ‘giving the careers service commercial freedoms and flexibilities’, to the intention to ‘encourage innovation’, and to hopes that ‘careers advice will be expanded’, with ‘scope to assist unemployed adults, people facing redundancy or those seeking a career change’ (see Watts, 1995).

2.4 In the event, some careers companies entered this wider market more strongly than others did. A survey of a wider range of organisations by the Department for Education and Employment’s Quality Assurance Division indicated that charging of individuals was relatively infrequent in publicly-funded organisations, and tended to be at rates lower than the costs of providing the service (QAD, 1995). A subsequent survey of 13 careers companies in England found that only five were prepared to disclose figures on turnover: of these, the maximum turnover in regard to charged work with individuals was just under £15,000; the parallel figure for work with organisations was £30,000 (Bysshe & Berry-Lound, 1997). A later survey by Jackson *et al.* (2001) divided the careers service companies into three categories. Between a quarter and a third were ‘youth-oriented’, doing very little adult guidance work; about a third were ‘public-service-oriented’, funding their adult guidance services solely from publicly funded programmes and providing them free to the user. Only the rest – less than a quarter – were ‘entrepreneurial’, developing a range of services to individuals and employers, predominantly on a fee-paying basis. Many had lacked sufficient development

capital to support ventures with more than a minimal level of risk (Watson *et al.*, 1998).

2.5 Market testing. Meanwhile, to test the more general potential for a market in guidance, a research project was carried out by PA Cambridge Economic Consultants (1993) to examine why a self-sustaining market had not developed more fully and why public intervention and investment in the development of guidance services were needed. The report noted that many people were unclear about the nature of guidance and its benefits, and tended to associate it with the role of the Employment Service in relation to the unemployed. It found that most would not expect to be charged for any guidance service they might use, and that only a minority could conceive of any circumstances in which they might consider paying. Moreover, the perceived need for guidance tended to be strongest among unemployed people and younger individuals, whereas willingness to pay tended to be strongest among those with higher-level academic qualifications and higher incomes. Circumstances in which employers would consider paying for their employees to receive guidance tended to be linked to specific situations, notably redundancy and training/skills enhancement.

2.6 To test the market still further, and to experiment with alternative forms of public support for guidance services, two experimental programmes were initiated by the Conservative Government: *Gateways to Learning*, aimed mainly at the unemployed; and *Skill Choice*, aimed more strongly at individuals in employment. Both programmes included guidance vouchers which individuals could take to a range of accredited guidance providers; particularly in the case of *Skill Choice*, these were designed to be supplemented by individuals and/or their employers. Evaluations by Coopers & Lybrand (1994a; 1994b) provided some evidence of marketing benefits, but little evidence of guidance clients using anything but the most basic of methods for choosing guidance providers, or of feeling empowered by their use of the vouchers. The evaluations concluded that the transaction costs of the vouchers were considerable, and that there would need to be convincing evidence of additional motivational benefits before these costs could be justified.

2.7 The two-level model. At the same time, it was clear that there was little possibility, in the light of continued public-expenditure constraints, of extending statutory free access to a full career guidance service. Accordingly, a compromise model was developed (TEC National Council, 1994; Watts, 1994; NACCEG, 1996), particularly in England and Wales. This subsequently became known as the ‘free to enter, pay to stay’ model. It distinguished between two levels of provision:

- *Foundation* guidance provision, including access to information, brief advice, and diagnostic guidance designed to identify further guidance needs.
- *Customised* guidance provision (e.g. counselling interviews, psychometric testing), which should be provided on a fee-charged basis to those able to pay, and on a free basis to those not able to do so.

This model was finally accepted by the Conservative Government in 1996, just before it fell from power in 1997.

2.8 Quality standards. The other major initiative taken by the Government around that time was to support the development of organisational quality standards (cf. paras.1.6 and 1.9 above). Following an initial mapping exercise by Hawthorn (1995), the Guidance Council was commissioned to develop such standards for the field as a whole, from the viewpoint of the interests of the client. Part of the aim of the standards was to support the development of a quality-assured market in guidance. The first version of the standards was completed in 1999, and was subsequently converted into the Matrix standards in 2002.

2.9 The partnership model. When the Labour Party came into power in 1997, it for a while continued the main strands of the previous Government’s policy in the adult guidance area, but with more emphasis on partnership rather than competition between guidance providers. Policy delivery was to be through the formation of local Information, Advice and Guidance (IAG) Partnerships. The policy was still based on the two-level model: public funding for universal free access to information, brief advice, and also “‘signposting” advice to further sources of information, and guidance, including those for which a charge is levied”; plus in-depth guidance available free to specified groups, especially the unemployed, but not ‘universally supported out of public funds’ for the majority of adults in employment (DfEE, 1998, pp.4-5). Subsequently, all full members of IAG Partnerships were required, by 2002, to have achieved accreditation against the Guidance Council (later Matrix) quality standards (DfEE, 2000, p.15).

2.10 Individual Learning Accounts. A significant innovation introduced by the Labour Government was to launch an experiment in Individual Learning Accounts (ILAs) (cf. para.1.8 above). This promised to stimulate a stronger model of provision, including market-based elements. The initial experiment was limited to pump-priming a million accounts, but the longer-term vision held by some protagonists was that ILAs might become the main means through which post-compulsory education and training would be funded. The key principles were ‘two-fold’: that individuals were best placed to choose what and how they wanted to learn; but that responsibility for

investing in learning needed to be shared between the state, employers and individuals, with ILAs providing the mechanism for them to co-invest. Career guidance, it was suggested, was the means of reconciling these two principles: reassuring the state and employers that while decisions about the use of their contributions would be made by individuals, these decisions would be well-informed and well-thought-through. In addition, ILAs were seen as a way of breaking out of the costing barriers to the expansion of guidance provision itself, enabling it to be financed on a full-cost basis by getting employers and the state to supplement what individuals were prepared to pay (Watts, 1999; Bosley *et al.*, 2001; see also Smith & Spurling, 1999). In the event, however, accusations about misappropriation of public funds led to the Government discontinuing this initiative, and although some ILA programmes still exist in Scotland and Wales, there seems little possibility of substantial implementation of the ILA model across the UK for the foreseeable future.

2.11 Connexions. The major policy move made by the Labour Government in the career guidance field was, however, its decision to subsume the Careers Service within the Connexions Service. This reduced the number of careers service companies and effectively restricted their potential for developing stronger market-based provision for adults (cf. para.2.4 above). Initially 22 of the Connexions Partnerships continued to sub-contract careers services for young people to careers service companies, but in 2004 pressures linked to VAT rulings reduced this to 15. Most of these contracts were held by a small number of organisations: notably VT Career Management, which in early 2005 held seven contracts and shared three others; Nord Anglia, which held four contracts; and CfBT, which held three. Few of these services marketed paid services to individuals and employers, partly because such work were not seen to pay (fees tended to be charged at marginal-cost rates, and made no contribution to overheads or profits) and partly because there seemed to be market resistance in the private sector to organisations that were seen as operating within a public-sector ethos (though cf. para.3.7 below).

2.12 In early 2005, there were ‘leaks’ in the press that the Government was planning to dismantle the Connexions Service. One of the policy options mooted was that the money for funding career guidance should be passed to schools and colleges, which should then be free if it so wished to buy in services from careers service companies or other external providers. Experience in the Netherlands suggests that if this option was adopted, many schools would choose to retain the money (OECD, 2002). Nonetheless, a number of providers have noted that it might open up some new possibilities for market-based delivery.

2.13 Current policy. In terms of adult guidance, OECD’s report on career guidance policies in the UK stated that arrangements regarding adult guidance were ‘an uneasy compromise between a fully government-funded system on the one hand and a more fully market-based system that contains special provision for the disadvantaged on the other’ (OECD, 2003, para.82). The new national policy framework document subsequently issued by the Government (DfES, 2003) seemed to come down clearly on the latter side. The Minister’s foreword to the document stated that: ‘The Government’s efforts and investment of public funds should focus on those who need the most help, and who are least able to pay for it’. The document defined this in terms of skill levels: those with qualifications at or below level 2 were to be given priority. For other groups, it recognised the contribution to the delivery of IAG services made by the private sector: ‘There are many private sector consultancy firms providing guidance commercially, and we welcome the work of the private sector to make available IAG services for those people who can afford to pay for them.’

2.14 It is however noteworthy that the policy framework document made no reference to the potential roles of Government in relation to the private-sector provision – for example, in stimulating demand or encouraging quality assurance – except in the general context of the role of the integrated IAG service in ‘supporting delivery of IAG in the workplace’ (*ibid*, para.4). The document announced that there was to be ‘an overarching IAG identifier to link together the key deliverers of IAG services for adults’, to be displayed by IAG Partnerships, learndirect, Jobcentre Plus and Worktrain; and that this was to be ‘supported by a strategy to raise user awareness and visibility of IAG services’ (*ibid*, para.22). But there was no suggestion that the ‘identifier’ might be used by private-sector organisations which meet the Matrix standards (except possibly as part of IAG Partnerships) – though this possibility was not specifically excluded.

2.15 A commentary on the policy framework document by Dent (2004) suggested that the creation of a market in adult guidance might justify an extended though tapering injection of public money. He noted experiments in ‘fee-for-service’ in the UK had tended to be small but time-limited, and that it was ten years since the largest pilot (Skill Choice – see para.2.6 above) had ended. He pointed out that, except possibly in the major conurbations, the majority of the population would be hard pushed to access a high-quality and appropriately-priced private adult guidance service. He also suggested, building upon the evidence from the USA presented by Hughes & Gray (2004), that technological developments might help to create the potential for distance-based ‘pay-at-the-point-of-use’ guidance services.

2.16 In reviewing future policy options, marketing campaigns and referral mechanisms would seem to be key issues. The learndirect helpline is linked to extensive marketing campaigns, and receives around a million calls per year. The Government's new policy framework has strengthened the links between learndirect and local services. Telephone calls can now be transferred to a nextstep provider in each of 47 localities. Current Government policy is however for such transfers to be confined to users who do not have a qualification at level 2 or above. Such users are routinely asked, early in the call, whether they wish to be transferred, partly to access more local information and partly to be able to set up a face-to-face session if they so wish. Currently, only 4% take up the offer (Watts & Dent, in press). In principle, however, learndirect could be encouraged to focus its marketing campaigns more on career development, and to refer all other users requiring more intensive help to a list of Matrix-accredited organisations, including private-sector and other fee-charged services. The same could apply to Jobcentre Plus, which again is currently being encouraged to refer low-skilled clients to IAG providers (NEP, 2004) but could be encouraged to play a wider referral role.

2.17 The possibility of a significant policy move in this general direction is outlined in the recent Skills White Paper (HM Government, 2005). This states the Government's intention to achieve a 'step change' in using the existing information and guidance infrastructure to help many more adults. This should include 'personal, high-quality support', to 'be available face-to-face, on-line, or by telephone, depending on the individual's needs and preferences'. It 'should involve a combination of free and charged services, well-marketed as the best source of impartial guidance which can help individuals, and linking independent guidance services with those provided by colleges, universities and training providers' (*ibid*, part 1, para.74). Much attention is given to the services provided by learndirect. The way this is framed is compatible with the notion of viewing learndirect not only as a delivery vehicle in its own right but also as the primary means of marketing a much wider range of provision, including face-to-face services, and charged as well as free services.

3. Extent of the current UK market

3.1 Schools and colleges. Under the Employment and Training Act 1973, amended by the Trade Union Reform and Employment Rights Act 1993 and the Learning and Skills Act 2000, the Government has a statutory duty to provide career guidance support services to all individuals engaged in full-time education (other than those in higher education) plus young people under 21 who have left education two years previously. In England, this service is provided

through Connexions partnerships; in Scotland, through Careers Scotland; in Wales, through Careers Wales. It is offered free of charge to individuals and to schools, colleges and training providers.

3.2 Independent schools, however, have tended to purchase career guidance services from independent providers. The longest-established of these is the Independent Schools Careers Organisation (formerly the Public Schools Appointments Bureau), which is an educational charity that currently serves around 370 of the 660-odd secondary-age independent schools. In addition to core services, it offers a student service which includes the Morrisby psychometric profile plus some 'after-care' extending to age 23. In 2004, 14,305 students enrolled on this service: in some schools, on an 'all-in' basis (where the customer is the school); in others, on either an 'opt-in' or 'opt-out' basis (where the customer is the parent, via the school). ISCO's main competitor is Cambridge Occupational Analysts Ltd, a private company which also markets its Centigrade programme to state schools, sometimes via Connexions/careers companies: it estimates that around two-thirds of Centigrade's UK customers are state rather than independent schools. ISCO, too, is interested in promoting its services to state schools, partly because of the changes in the Charities Bill which are likely to require evidence of public benefits. If some of the current Connexions funding is transferred to schools and colleges (see para.2.12 above), this could increase the potential of this market, with the remaining careers service companies (see para.2.11) also competing for it.

3.3 Higher education. Unpublished data from a recent NICEC survey of higher education careers advisory services found that while all offered free services to their own students, a fair number restricted their services to graduates:

- In the case of their own graduates, only 38% offered an indefinite service; most of the rest restricted it to 2-3 years post-graduation.
- In the case of graduates from other institutions, many confined it to a limited service and/or for a limited period (usually 2-3 years post-graduation).

For other graduates, charges might be levied. The extent of usage of such charged services was not clear, but is likely to be related to the institution's geographical location and visibility.

3.4 The University of London Careers Group has probably proceeded further in this direction than others. Its own graduates can retain access to its services by joining its Grad Club: around 2,500 are on its books at present. In addition, a Graduate Careers Shop has been established, which offers career interviews, seminars and other services to the general public on a fee-

charged basis: around 3,000 individuals per year use these services. Career development services are also provided to organisations.

3.5 Adults. An analysis of a sample of Yellow Pages directories (Appendix 1) suggested that there are around 1,400 organisations listed as offering careers advice across the country as a whole, of which around 550 are private-sector organisations. Some of the latter provide services for young people, but most focus mainly on adults. The 550 private-sector organisations include some repeat-counting of organisations which are listed in more than one area: these include, in particular, Proteus Consultancy Ltd, Penna, and Connaught Executive Career Services Ltd.

3.6 Some private-sector organisations provide services solely to individuals; some solely to employers; some to both. The market for services to employers is much larger than that to individuals. It focuses around outplacement, which may include career guidance but tends to place a strong emphasis on job placement. Companies working in this area often provide wider career development and other services as well. The three major such companies in the UK are:

- RightCoutts, which was formed in 2002 by a merger between Right (an international US-owned company) and Coutts (which had offices across the UK). It describes itself as a ‘career transition and organizational consulting firm’. It is a wholly-owned subsidiary of the US-owned Manpower Inc. Internationally, it operates from over 300 service locations, in 37 countries. It currently has 19 offices in the UK, each containing at least one full-time Senior Consultant and sometimes more; most of the staff, however, are part-time Associate Consultants.
- Penna (formerly Penna Sanders & Sidney), which has grown by merger and currently has 26 offices in the UK, as well as offices in 6 other European countries; it also has a global alliance with Lee Hecht Harrison, a US-owned career management business.
- DBM, which operates from a network of over 225 offices in 51 countries.

3.7 Services concentrating solely or primarily on career development services paid by individuals are much more limited, and much smaller. Some are operated by sole traders. A recent initiative to test the potential of this market is being made by igen in Leeds: a careers company which operates one Connexions contract and three LSC-funded ‘information, advice and enhanced services’ contracts in the north of England. Through a subsidiary company (mantra) it has established Careergen to offer what it terms a retail ‘career solutions service’. This operates from on-street purpose-designed offices in central Leeds, with a free initial assessment supported by a range of charged

services provided by associate ‘career coaches’. It has been accompanied by extensive marketing, based on commissioned market research; this is aimed particularly at 20-40-year-olds.

3.8 Some private employment agencies include some career advice in their services. These services, however, are paid for by employers: under the terms of the Employment Agencies Act 1973 such agencies are prohibited from charging individuals for the services they provide. This may restrict the potential growth of an individually-funded ‘market in career’.

3.9 Some private-sector and other fee-charging services receive income from publicly-funded contracts – for example, redundancy counselling funding available from the European Social Fund through Regional Development Agencies. Most, however, do not.

3.10 An analysis of services offered in the Chartered Institute of Personnel and Development (CIPD) *Code of Practice Directory of Career and Outplacement Consultants 2004-05* (Appendix 2) found that, among the 73 organisations listed, the most common terms used for core career-related services were:

- Career management (17).
- Career coaching (14).
- Career counselling (13).
- Career development (13).

No others received more than five mentions. The main more specific career-related services listed were:

- Outplacement (counselling) (39).
- CV preparation/personal marketing (16).
- Psychometric assessment (15).
- Preparation for (early) retirement (10).
- Preparation for self-employment (9).
- Redundancy counselling (7).

Many of the organisations also offered a wide variety of other training and support services, including executive coaching/mentoring, training of various kinds, and even (in a few cases) legal and financial advice.

3.11 Alongside face-to-face services, there are a growing number of web-based services. A review of a sample of 20 of these (Appendix 3) found that most were designed specifically to offer career guidance; that many were concerned with psychometric assessment and CV preparation; and that nearly half were free of charge, while the rest charged for some or all services. A US study of a sample of websites offering no-cost career assessment found that almost none included any reference to how instruments had been developed or to underpinning psychometric data on reliability and validity (Oliver & Zack, 1999).

3.12 In terms of professional associations, private-sector providers seem likely to belong to one or more of three main bodies:

- CIPD (see para.3.10 above) has three main levels of membership: Chartered Member (MCIPD), requiring three years' relevant experience at management level; Chartered Fellow (FCIPD) requiring ten years' such experience; and Chartered Companion (CCIPD), gained by invitation only. These cover all areas of human resource work. The CIPD Career Forum (special interest group) currently has 1,400 members. The Directory (see above) is not limited to CIPD members, but those listed have to sign up to the Code of Practice (which includes a complaints procedure).
- The Association of Career Professionals (ACP) International is a global organisation with members in over 30 countries who provide career-related services to individuals or organisations. It currently has 135 members in the UK. Approximately 30% of these are with outplacement or career management firms; the remaining 70% have their own businesses offering career services – these vary in size and in scope of practice, but most are solo practitioners. ACP International offers certification through the Institute of Career Certification (ICC) International, at five levels: Associate, Practitioner, Fellow Practitioner, Fellow Manager, and Emeritus Practitioner/Fellow.
- The Institute of Career Guidance manages a Register of Guidance Practitioners. There are currently 174 practitioners on the register, of whom 27 have provided employment details that suggest they are in private practice (such information is not specifically requested on the application form). The total ICG membership is around 3,000.

Some may also be members of bodies like the British Psychological Society, or may be registered with BPS to administer psychometric tests. There are also a variety of professional associations in cognate areas like coaching, counselling and mentoring. On coaching, for example, the UK International Coach Federation has nearly 650 members in the UK: these may cover career coaching (focusing primarily on career progression) but more commonly are concerned with life coaching (focusing on work-life balance and personal development) and/or executive coaching (focusing on executive performance).

3.13 Currently, 1,213 organisations are accredited as meeting the Matrix quality standards (see para.2.8 above). Of these, 18 (1.5%) are listed as 'private sector' (see Appendix 4). These include some employers offering career development services in-house, as well

as organisations like Penna and RightCoutts.

3.14 Demand. On market demand, MORI (2001) found that nearly half of the working-age population had accessed information, advice and guidance about learning and work opportunities in the preceding year. The most common source was employers; a wide variety of other sources had also been used. One in four expressed some unmet demand for IAG during the previous three years. Asked about the IAG services they had used in the past, 28% associated them with being 'free' and 8% with being 'good value for money'; when asked about their ideal services, the parallel figures rose to 35% and 18% respectively (p.101).

3.15 A later survey by Skillset (2003) of the workforce in the broadcast, video and interactive media sectors found that just over a quarter (27%) of respondents said they had never received structured careers advice or guidance, and just under a fifth of these said they had received it from a careers service or adviser or a private careers advice service (most of the rest had received it from their employer or work colleagues). Those who had not received any structured guidance were asked whether they would consider paying for such advice to further their career: 41% said they would. In contrast to earlier findings (cf. para.2.5 above), the proportion was higher among those with lower salaries: almost half of those earning below £20k said they would consider paying, as opposed to a quarter of those earning £50k or more (pp.41-44). Skillset has now set up its own fee-charged sector-based career development service, and some other Sector Skills Councils are considering doing the same. This may stimulate the growth of a wider range of sector-based services, alongside more generic services.

4. Conclusions

4.1 From the analysis and evidence above, a number of tentative conclusions can be drawn:

- Public policy in the UK has remained ambivalent about market-based provision in career guidance. It is clearly not willing to support a comprehensive and universal publicly-funded system of provision. But its measures to encourage market-based provision have been limited, and not sustained.
- If access to career guidance is regarded purely as a private good, this does not matter. If however it is viewed as a public good – as the report by OECD (2004) and the Resolution on Guidance by the Council of the European Union¹ affirm it should be – then, in the absence of support for comprehensive and universal publicly-funded access, there is a strong case for publicly-funded provision to be complemented by more sustained and more

¹ See especially the statement that: 'Services need to be available at times and in forms which will encourage all citizens to continue to develop their skills and competences throughout their lives, linked to changing needs in the labour market. Such services need to be viewed as an active tool, and individuals should be positively encouraged to use them.' Resolution 9286/04 EDUC 109 SOC 234, 18 May 2004.

- proactive policy support for market-based provision.
- Many individuals are able to secure the help they need through the institutions in which they are based (schools, colleges, universities, employers). The strongest part of the current 'market in career' is in support of such provision: provided, for example, to independent schools, or to employers in the form of outplacement and career development services.
 - There is however a concern that where services are provided or purchased by an institution, the services provided may be directed to serve the interests of the provider or customer (the institution) as well as the end-user (the individual). As OECD (2004) notes: 'If for example an employer wants to retain an employee, he/she may not be willing to support access to guidance services which encourage the person to investigate jobs in other organisations' (p.68).
 - This focuses attention on the extent to which a significant part of career support provision might comprise a market in which services are purchased by individuals.
 - At present, the extent of such a market is limited. Some services in the public and voluntary sectors do charge fees; there is also some private-sector provision available to individuals. Often, however, such services are subsidised by other activities, and charged at rates designed to cover marginal costs.
 - Evidence from learndirect and elsewhere suggests that there is significant latent demand for career development services which could be stimulated by effective marketing. The costs and risks of investment in marketing to individuals appears to be a significant obstacle to market growth.
 - The current structures of professional formation within the career development are diffuse, with a significant gulf between bodies mainly covering professionals within the public sector (for example, the Institute of Career Guidance and the International Association for Educational and Vocational Guidance) and within the private sector (for example, CIPD and ACP International).

4.2 The Skills White Paper (see para.2.17 above) refers to the need to achieve a 'step change' in the level of access to career guidance provision, and the wish to do so on the basis of a well-marketed combination of free and charged services. This offers an opportunity for the Government to pay more attention than before to existing market-based provision, and to ways in which both the extent and the quality of such provision might be enhanced.

Appendix 1: Review of Yellow Pages

There are 74 Yellow Pages directories covering England. Using systematic random sampling across the collection at the University of Derby, every fifth copy was selected provided it was a 2003/04 or 2004/05 edition. Entries under 'Careers Advice' were then classified into three categories: publicly-funded, charitable, and private-sector. In some cases, judgements had to be made in the light of the information available. The results of the analysis are given in the table below:

Yellow Pages area	No. of publicly-funded organisations	No. of charitable organisations	No. of private-sector organisations	Total
Birmingham North	9	0	2	11
Brighton	14	2	10	26
Carlisle & North Cumbria	2	1	0	3
Colchester	6	0	0	6
Exeter	4	0	1	5
Gatwick Area	8	0	10	18
Leeds	3	1	11	15
London Central	12	0	46	58
Maidstone	8	0	3	11
Mersey	30	0	2	32
Oxford & Banbury	14	0	6	20
Reading	15	0	7	22
Southampton	13	0	7	20
Tunbridge Wells	12	1	4	17
Wolverhampton	9	2	3	14
Total	159	7	112	278

Of the 159 publicly-funded organisations, 105 (66%) were Connexions services and 29 (18%) were armed forces careers offices (i.e. recruitment services). If taken as proportions of all organisations listed, the breakdown is:

Private-sector organisations	112 (40%)
Connexions services	105 (38%)
Armed forces recruitment services	29 (10%)
Other publicly-funded organisations	25 (9%)
Charitable organisations	7 (3%)
Total	278 (100%)

The private-sector organisations include some which are listed in more than one area: these include, in particular, Proteus Consultancy Ltd, Penna, and Connaught Executive Career Services Ltd.

On this basis, it would seem likely that there are nearly 1,400 organisations listed as offering careers advice across the country as a whole. Of these, around 550 are private-sector organisations.

Appendix 2: Analysis of services offered by organisations listed in the CIPD Directory of Career and Outplacement Professionals

No. of organisations listed: 73

Core career-related services

‘Career advisory services’	1
‘Career assessment’	1
‘Career audit’	2
‘Career change’	5
‘Career coaching’	14
‘Career consultancy’	2
‘Career counselling’	13
‘Career development’	13
‘Career diagnostics’	1
‘Career guidance’	3
‘Career management’	17
‘Career planning’	4
‘Career review’	5
‘Career search’	1
‘Career transition’	4
‘Career workshops’	4

Specific career-related services

Competency mapping/skills audit	2
Psychometric assessment	15
CV preparation/personal marketing	16
Preparation for self-employment	9
Mid-life planning	2
Preparation for (early) retirement	10
Outplacement (counselling)	39
Redundancy counselling	7
Redeployment counselling	2

Other services

- Executive coaching
- Executive mentoring
- Management training
- Leadership training
- Talent management
- Communication skills training
- Team building
- Diversity awareness
- Selection and appraisal skills
- Strategic management
- Stress management
- Well-being programmes
- Work-life balance
- Employment law training/advice
- Financial advice

Qualifications listed for individuals

FCIPD	38
MCIPD	30
CCIPD	2
MCFI	4

Around 20 other qualifications listed (including DipCG), but none more than once.

Appendix 3: Web-based services

Twenty websites advertising online career information and guidance were surveyed from a keyword search on www.google.com using the term 'online careers guidance' and clicking the 'pages from the UK' option. Google reported approximately 502,000 results. All sites in the sample were accessed via the search results on the first page, either directly or via other links. Approximately 50% of the results of the first page led to websites that were included in the sample. Website links to career guidance organisations or companies that did not offer online services were excluded. It is important to note, for future research purposes, that Google searches with the same keyword produce slightly varied results on different occasions.

There were broadly six types of service available. These were: online questionnaires and psychometric testing (50%); online career self-assessment tools (25%); CV preparation, covering letter and job-application writing services, including appraisal (25%); CV template downloads (15%); 'hints and tips' style information guides, manuals and courses (45%); job vacancies and course database searching (15%); and online contact with advisers or consultants (10%). Forty per cent offered more than one type of service. Eighty per cent of the websites were designed specifically to offer career guidance (although one was the careers advisory service component of a larger university website); the other 20% comprised sections of general websites, such as BBCi and Google.com. Forty-five per cent of the sample offered all services free of charge; 35% charged for all services; and 20% offered a mixture of both free-of-charge and fee-charged services.

Fifty per cent offered some type of questionnaire-style testing. Types of tests ranged from occupational interests and job matching, through aptitudes and abilities, to personality and IQ. Some were specific career-related sites; others were part of a larger website of general tests. Three websites made no charges for these services; six charged fees that ranged from £4 to £44.65 depending on the type of test and the type of report requested. One website offered a mini-report for free and charged an unspecified fee for the full version. In general, personality tests on specific careers websites had the highest costs (£20 to £44.65), while the lowest fees were charged by two general sites, which charged £4 and £8.50 respectively for all types of tests, including those not related to career.

One-quarter of the websites surveyed offered some kind of online self-assessment career tool, usually in the style of an exercise workbook. All these tools were available free of charge, although in one case it was clear that the instrument was designed to be used in a facilitated workshop session with a career professional.

Thirty-five per cent of the sample offered services related to job applications and CVs. Five websites offered CV writing services; one offered CV evaluation or appraisal (other sites may have offered this via contact with a careers adviser); and three offered online CV template facilities. Two websites offered covering-letter writing services and one offered job-application-form writing services. All websites offering CV writing services charged fees. These ranged from £40 to £797. Many organisations offered different packages depending on income and, in some cases, age. Charges for covering-letter writing services ranged from £10 to £149, while the website offering job-application-form writing priced its services from £40 to £200 depending on job status. The website offering CV evaluation advertised two services: appraisal, with costs ranging from £1.75 for a quick email comment to £27.50 for a more detailed evaluation; and mentoring, designed to evaluate and suggest alterations to an existing CV, priced at £130. Of the three websites offering online CV templates, two were available free of charge, the third costing between £15 and £20.

Nine websites offered 'hints and tips' style information guides. Seven provided this information free of charge, either directly on the website or via email. A range of information was available including job-searching advice, CV preparation, interview techniques, occupational information, dealing with work-related stress, promotion, employment law, financial information and self-employment. Two websites provided guidance on CV writing for a fee: one offered tutorial manuals, while the other offered an online course in CV writing. Both of these had variable charges between £10 and £21.

Three websites provided free facilities to search for course and job vacancies. One of these included overseas job vacancies.

Two websites offered email contact with a careers adviser or consultant. Of these, one provided this service free of charge, whilst the other offered email (and telephone) coaching for an unspecified fee.

Appendix 4: Matrix-accredited organisations

Type of organisation	No. of accredited organisations
Adult and Community Learning	124
CAB	3
Career	70
Chamber of Commerce	3
Child Welfare	1
FE College	207
Higher Education	79
HM Prison Service	8
Housing Association	23
Library Service	19
Local Authority	66
Other	12
Private Sector	18
Probation Service	7
Recruitment Agency	3
Refuge	1
Sixth Form Colleges	28
Special Needs	42
Training	110
TUC	23
Voluntary	366
Total	1,213

The 18 Matrix-accredited private-sector organisations are:

Abbey National Plc (Group Training & Development), Milton Keynes
 Bloomfield Supplies Limited, Gloucestershire
 British Sky Broadcasting Ltd (BSkyB), Middlesex
 Catalyst, Norfolk
 Debden Security Printing Limited, Essex
 Employment and Regeneration Partnership Ltd, Manchester
 High & Mighty Limited, Berkshire
 Lever Faberge Limited, Leeds
 London Hilton Park Lane, London
 Malcolm Hollis, London
 Metro (West Yorkshire Passenger Transport Executive), Leeds
 Penna, Derbyshire
 PPG Industries (UK) Limited, Wigan
 RightCoutts, London
 Rolls Royce Plc Resource Centres, Derby
 Shepherd Construction, York
 Southern Water, Worthing, West Sussex
 Stroud & Swindon Building Society, Gloucestershire

Annex: Summary of Consultation Event Proceedings

Introduction

1.1 The Centre for Guidance Studies (CeGS) at the University of Derby facilitated, on behalf of the Department for Education and Skills (DfES) Engaging Adults in Learning Division, a consultation event designed to examine the potential and scope for stimulating UK market demand for career guidance. Its aim was to examine the application of market principles to the delivery of career guidance and, in particular, to explore whether or not this could be an effective means of meeting the public interest in expanding provision without making excessive demands on the public purse. The timeliness of the event was enhanced by the publication of the Skills White Paper, with its reference to achieving a step change in the use made of the information and guidance structure through a combination of free and charged services.

Key objectives

1.2 The following key objectives were agreed to frame the process of the consultation event:

- (i) To review market-based models of delivery and their relationship to public policy developments.
- (ii) To identify the main ‘risks’ and ‘benefits’ associated with stimulating market demand from a public policy viewpoint.
- (iii) To assess the potential for enhancing current policies and develop at least four main strategies to support government in strategic planning and development of careers provision for adults.
- (iv) To explore ways of integrating or at least co-ordinating structures of professional formation across the public, private and voluntary sectors.

Review of market-based models

1.3 The following models of market-based service delivery were identified:

- fee-charged services offered by public-sector organisations;
- government-financed services contracted out to the private (for-profit) and voluntary (not-for-profit) sectors;
- services in the voluntary sector financed not by government but by other sources (including charities, private-sector organisations, and end-users); and
- services in the private sector financed by end-users or by non-government third parties (e.g. employers).

1.4 The general principle of ‘creating a market in career’ to take pressure off the public purse was accepted as a serious proposition to be developed within the government’s new skills policy framework. This will complement publicly-funded provision, so extending access to a range of high-quality ‘products’ and ‘services’ available on a free or charged basis to all members of the public.

1.5 Three possible roles for government were outlined:

- (i) stimulating the market in order to build and strengthen its capacity;
- (ii) regulating the market and assuring the quality of services, both to protect the public interest and to build consumer confidence; and
- (iii) compensating for market failure where this is appropriate.

It was agreed that government has a vital role to play in all three respects.

Stimulating market demand

1.6 The *benefits* associated with offering a combination of free and charged services were primarily linked to:

- cost-savings to the public purse;
- improving access to ‘quality assured’ services; and
- increasing the capacity of career guidance organisations to meet the potential demand.

1.7 The *risks* associated with such a blended strategy included:

- managing the transition from a situation where many individuals are accustomed to having access to free services;
- growing the supply-side of the market in response to demand;
- managing expectations of services required, particularly in the early set-up phase; and
- ensuring high-quality provision that safeguards the interests of consumers.

1.8 The role of learndirect in helping to promote and stimulate market demand through advertising, signposting and facilitating linkages with kite-marked providers of career services received a highly favourable response. The main outcome from discussions on the marketing and branding of public/private sector services was that ‘marketing specialists’ would be best placed to develop this, working closely with potential ‘consumers’ and ‘service providers’.

Government strategies

1.9 At least four major themes emerged from the event which require attention by the new Review Group announced in the Skills White Paper:

- (i) Regulation
- (ii) Segmentation
- (iii) Marketing
- (iv) Capacity building

Regulation

1.10 The issue of who should regulate the market, in order to secure confident referrals and safeguard the interests of consumers, requires more detailed analysis, linked to clearer ‘product’ definition. Two types of needs were identified:

- An independent regulatory framework for the career services industry in the UK, with a range of rule making, investigatory and enforcement powers to promote efficient, orderly and fair markets and ensure that consumers achieve a fair deal.
- More integrated forms of professional formation to define common ethical standards and develop an integrated competence framework.

1.11 The relevant bodies might be grown from existing bodies such as the Guidance Council or the Federation for Professional Associations in Guidance (FedPAG), or new bodies or mechanisms might be necessary. Existing quality-assurance mechanisms such as the Matrix standards and/or the Adult Learning Inspectorate (ALI) are adapted to the needs of larger services rather than those of small services and ‘sole traders’: regulation in relation to the latter might need to be confined to individual professional competence standards. Attention might also be paid to the possibility of using eBay-style customer feedback methods.

Segmentation

1.12 The new White Paper indicates that a combination of free and charged services is needed. This raises the issue of where the line is to be drawn between the free and the charged services in terms both of (a) type of service and (b) type of client.

1.13 It was suggested that all adults should have free access to information and advice, and also to basic diagnostic services designed to define their need for further services, through learndirect and/or face-to-face provision. The further services (counselling, psychometric testing, courses, etc.) could be set out as a differentiated ‘menu of provision’ designed to be responsive to the individual needs of the consumer. These would be free to some customers but charged to others.

1.14 Current Government policy is to distinguish those who should have access to further free services in terms of qualification levels. This risks, however, depriving access to groups such as new graduates, who increasingly need sustained support in moving through short-term jobs designed to clear student debts into longer-term career paths. One alternative possibility might be to adopt financial ‘means testing’. Another might be to adopt more flexible forms of targeting.

Marketing

1.15 The role of government in stimulating the ‘market in career’ was considered. This could be done through learndirect linked to public/private-sector partnership arrangements. The marketing strategy should be led by professional marketing organisations working closely with policy-makers and providers of career services. It might be based on sought outcomes rather than processes, and informed by research currently being undertaken by MORI and by the Institute for Employment Studies (IES), as well work being carried out by the Institute of Employment Research (IER) at the University of Warwick and by the Centre for Guidance Studies (CeGS).

1.16 An important and as-yet-unresolved issue is whether the role of government is to pump-prime a market which should then become self-sustaining, or whether it should have a continuing marketing and referral role.

In addition, it would be very helpful if more explicit elements of career planning could be built into the Investors in People (IiP) framework, possibly linking this more clearly to the Matrix standards.

Capacity building

1.17 In order to meet the potential demands of consumers there is an urgent need to drive up the capacity of the careers industry. This might include:

- mapping in more detail the existing capacity of the private sector;
- reviewing the training, financial support and supervision available for entrants to the industry; and
- specifying requirements for continuous professional development (CPD).

Recommendations

1.18 The following recommendations are outlined for consideration by the Review Group:

- (i) Consult with professional groups and other relevant bodies to develop a regulatory framework for the industry, alongside a more integrated approach to professional ethics and standards. (para.1.10, 1.11)
- (ii) Assess the extent to which the Matrix standards and the work of the Adult Learning Inspectorate (ALI) might be 'flexed' as part of this framework. (para.1.11)
- (iii) Seek agreement on a common core terminology for use within both the public and private sectors. (para.1.10, 1.13)
- (iv) Commission a more detailed research project to map current private-sector career guidance provision in order to assess its capacity to respond to potential consumer demands. (para.1.15, 1.17)
- (v) Consider the merits of 'means testing' versus 'flexible targeting' in distinguishing those eligible for free as opposed to charged services. (para.1.14)
- (vi) Work with professional marketing services to develop and promote the brand and image of the new nationwide service. (para.1.8)
- (vii) Explore the potential link between Investors in People (IiP) and Matrix standards in order to encourage employers to provide more support for the career development of their employees. (para.1.16)
- (viii) Commission a review of training, financial support and supervision available to new entrants to the industry. (para.1.17)
- (ix) Emphasise the requirement for continuous professional development within the industry, and include attention to this within the new regulatory arrangements. (para.1.10, 1.11, 1.17)

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