

TABLE OF CONTENTS

SPONSOR'S FOREWORD	iii
LIST OF TABLES	xvii
LIST OF FIGURES	xxi
EXECUTIVE SUMMARY AND HIGHLIGHTS	1
1. MARKET	19
1.1 Introduction	19
1.1.1 Definitions	19
1.1.2 Overall demand	20
1.1.3 Demand by age of child, and type of placement	22
1.1.4 Activity trends	24
1.2 Covid-19 and care volumes	26
1.3 Policy overview of children's services	27
1.3.1 Overview of special education	27
1.3.2 Overview of children and young people services	28
1.4 Major political drivers since 2010	29
1.4.1 Special education	30
1.4.1.1 Children and Families Act (2014) and the SEND Code of Practice	30
1.4.1.2 SEND review: Right support, right place, right time (2022)	30
1.4.2 Children's social care	30
1.4.2.1 Residential care in England: Sir Martin Narey's independent review of children's residential care (2016)	31
1.4.2.2 Putting children first: Delivering our vision for excellent children's social care (2016)	31
1.4.2.3 Foster care in England: A review for the Department for Education by Sir Martin Narey & Mark Ownes (2018) and Fostering better outcomes (2018)	32
1.4.2.4 Independent review of children's social care (2022)	32
1.4.2.5 CMA market study into children's social care provision (2022)	33
1.4.3 Adoption policy since 2010	33
1.5 Potential future areas of policy focus	33
1.5.1 Regional commissioning	33

1.5.2	Market oversight	34
1.5.3	Improved outcomes	34
1.5.4	New care standards to inform quality regulation and commissioning	35
1.5.5	Reducing variation	36
1.5.6	Increased central government oversight and control	36
1.6	UK and England market value and spending	38
1.7	The UK GDP deflator	42
1.8	Gross spending on children and young people’s social care in England	42
1.8.1	Gross spending trends in recent years	42
1.8.2	Prospects for future spending on children’s services	46
1.9	Conclusion	48
1.10	MARKET SUB-SECTORS	49
A.	SPECIAL EDUCATION	49
A.1	Introduction, definitions	49
A.2	Pupils attending, and spending, on special schools and special colleges	50
A.2.1	Covid-19 impact on special education	53
A.3	Children and Families Act 2014: Reforming the SEND system	54
A.3.1	SEND Code of Practice	56
A.3.1.1	Education, Health and Care Plan (EHC Plan)	56
A.3.1.2	Requesting an assessment and a local authority’s duty to assess	57
A.3.1.3	EHC plan contents	57
A.3.1.4	Right to appeal	57
A.3.1.5	Right to request a school/college	57
A.3.1.6	Independent schools and colleges	58
A.3.1.7	Presumption of mainstream education	58
A.3.1.8	Consultation	58
A.3.1.9	Identifying demand	58
A.3.1.10	Offering provision (Local offer)	58
A.3.1.11	Information	58
A.3.1.12	Wider support for young adults	59

A.3.1.13	Personal budgets	59
A.3.1.14	Joint commissioning of integrated services	59
A.3.1.15	Looked after children	59
A.3.1.16	Children's social care	59
A.3.1.17	Transition to healthcare	59
A.3.1.18	Adult care services	59
A.3.2	Special education policy reviews following the Children and Families Act (2014)	60
A.3.2.1	Good intentions, good enough? A review of the experiences and outcomes of children and young people in residential special schools and colleges (2017)	60
A.3.2.2	Timpson review of school exclusion (2019)	60
A.3.2.3	SEND Futures: Value for money feasibility study (2020)	61
A.3.2.4	SEND Review: Right support, right place, right time (2022)	61
A.3.2.5	The creation of a single, national SEND and alternative provision system	62
A.3.2.6	Providing excellent provision from early years to adulthood	63
A.3.2.7	Reforming system roles, funding and accountability	64
A.3.3	Wider parliamentary focus	65
A.3.3.1	Education Select Committee: Special educational needs and disabilities (2019)	65
A.3.3.2	Public Accounts Committee: Support for children with SEND (2020)	66
A.3.4	Scotland, Wales, Northern Ireland policy overview	66
A.3.4.1	Scotland	66
A.3.4.2	Wales	67
A.3.4.3	Northern Ireland	68
A.4	Funding for special educational needs	68
A.4.1	High needs funding streams (public sector, England)	68
A.4.1.1	High Needs Funding block allocations	69
A.4.2	Managing dedicated schools grants overspends	70
A.4.3	Recent high needs funding trends	71
A.4.4	Future funding trends	74
A.4.4.1	Implications for high needs funding	74
A.4.5	Capital funding for increasing special educational provision capacity	76

A.4.6	Safety valve intervention programme prospects for high needs funding	76
A.4.7	National funding formula reforms	77
A.4.8	What it means for high-needs funding	78
A.5	Special school fees	79
A.6	Demand for special education in schools and special post-16 colleges	80
A.6.1	Demand for EHC plans	80
A.6.2	Growth in EHC plans in independent schools	83
A.6.3	Regional share of EHC plans	85
A.6.4	Special educational needs profile in special schools	86
A.6.5	Special education for school pupils without EHC plans	88
A.6.6	UK special education demand estimates	90
A.6.7	Demand for post-16 special education	91
A.6.8	Future demand drivers for independent sector special schools and special colleges	92
A.6.8.1	Population change	93
A.6.8.2	Prevalence of special educational needs and ‘high needs’	93
A.6.8.3	Incidence of EHC plans	94
A.6.8.4	Parental/student right to request an educational facility (mainstream vs. specialist education and public sector vs. independent sector)	95
A.6.8.5	Local authority high needs education budgets	96
A.6.8.6	Commissioning and outsourcing preferences – use of the independent sector	96
A.7	Supply of special schools and special post-16 colleges	100
A.7.1	Special school and college supply in England	100
A.7.2	Occupancy trends for special schools and colleges	101
A.7.3	Relative market power of purchasers and providers	103
A.7.4	Regional variations in supply of independent sector special education	103
A.7.5	New independent special school and college capacity	104
A.7.5.1	Special schools	105
A.7.5.2	Special colleges	106
A.8	Quality ratings	107
A.9	Regulatory/inspection changes in England	108

A.9.1	Consultation on new inspection framework for SEND provision	111
B.	CHILDREN'S RESIDENTIAL CARE	113
B.1	Profile of children in children's residential care	113
B.2	Demand for children's residential care	113
B.2.1	Children's residential care volumes and change in the UK	113
B.2.2	Penetration of the overall under 18-year-old population	114
B.2.3	Types of residential setting used	115
B.3	Average stay and placement stability	118
B.4	Supply of children's homes (registered children's homes, secure children's homes and residential special schools (open all year))	118
B.4.1	Capacity by place	119
B.4.2	Capacity by children's home	120
B.4.3	Measuring occupancy	120
B.4.4	Regional supply	122
B.5	Spending on children's residential care	124
B.6	Children's residential care prices	126
B.6.1	Average children's residential care prices	126
B.6.2	Price movement over time	128
B.6.3	Pricing structure	129
B.6.4	Future demand and increased outsourcing	130
B.7	Policy and legislative drivers	131
B.7.1	The Independent review of children's social care (2022)	132
B.7.1.1	Improving care quality and access	133
B.7.1.2	Continued support for Staying Close and Staying Put	134
B.7.1.3	Improving outcomes	134
B.7.1.4	Creation of a dedicated one-stop-shop Family Help service	135
B.7.1.5	A child protection system that acts in a just and decisive manner	135
B.7.1.6	Increasing the use of family networks to support children	135
B.7.2	CMA market study into children's social care provision (2022)	136
B.7.3	Government response to the Independent review and the CMA market study (2022)	137
B.7.4	Transforming children's services: Public Accounts Committee (2019)	138

B.7.5	Residential Care in England: Sir Martin Narey's independent review of children's residential care (2016)	139
B.7.6	Putting children first: Delivering our vision for excellent children's social care (2016)	139
B.8	Future trends	140
B.8.1	Children's residential care capacity	141
B.8.2	A shift towards regional commissioning	142
B.8.3	Smarter commissioning and commissioning efficiencies	142
B.8.4	Outcome focused commissioning	143
B.8.5	Sufficiency duty	144
B.8.6	Reducing inappropriate 'out-of-area' placements	145
B.8.7	Quality	146
B.8.8	New areas of demand	146
C.	FOSTER CARE	149
C.1	Profile of children in foster care	149
C.2	Demand for foster care	150
C.2.1	Recent demand trends	150
C.2.2	Fostering by sector	152
C.2.3	Regional fostering trends	154
C.3	Supply of fostering services	156
C.3.1	Total fostering supply	156
C.3.2	Use of available supply (the 'fill rate')	157
C.3.3	Placement duration	159
C.3.4	Unplanned placement endings	159
C.4	Spending on foster care	160
C.5	Foster care prices	163
C.6	Policy and legislative drivers	165
C.6.1	Independent review of children's social care (2022)	166
C.6.1.1	Improving care quality and access	167
C.6.1.2	Increasing the use of kinship care and family networks as an alternative to traditional foster care	169
C.6.1.3	Continued support for Staying Put and Staying Close	171

C.6.1.4	Improving outcomes	171
C.6.1.5	Creation of a dedicated one-stop-shop Family Help service	171
C.6.1.6	A child protection system that acts in a just and decisive manner	171
C.6.2	CMA market study into children’s social care provision (2022)	172
C.6.2.1	IFAs are not recommended to be included in a market oversight regime for the sector	172
C.6.2.2	Support for increasing local authority foster care	173
C.6.2.3	Improving commissioning and sufficiency planning through more support for local authorities, including the potential use of sub-national regional groups.	173
C.6.2.4	A thorough review of regulations to ensure they do not block the effective provision of placements	173
C.6.3	Government response to the Independent review and the CMA market study (2022)	174
C.6.4	Foster Care in England: A Review for the Department for Education by Sir Martin Narey and Mark Owers (the ‘Stocktake review’) (2018)	175
C.6.5	Fostering Better Outcomes: Government response to the Narey and Owers Report (2018)	175
C.6.6	Putting children first: Delivering our vision for excellent children’s social care (2016)	177
C.7	Future trends	178
C.7.1	Increased recruitment of foster carers	178
C.7.2	More family and friends taking on kinship care roles	179
C.7.3	Increased diversity and specialist skills across approved foster carers	179
C.7.4	Promoting longer-term fostering arrangements	179
C.7.5	Increased regional commissioning and sufficiency planning	180
C.7.6	Spending, prices, and profitability	180
C.7.7	Independent sector share and a level playing field	181
C.7.8	Service diversity and outsourcing partnerships	182
C.7.9	Quality	183
D.	ADOPTION	185
D.1	Adoption demand trends	185
D.1.1	Recent demand trends	185
D.1.2	Adoptions by age	190
D.2	Adoption supply	191

D.3	Spending on adoption services	192
D.4	Policy and legislative drivers	194
D.4.1	Adoption policy under the Coalition government (2010–2015)	194
D.4.2	Adoption policy under a Conservative government (2015–2020)	195
D.4.3	Regional adoption agencies	195
D.4.4	Increasing the number of children for adoption and the number of families looking to adopt	197
D.4.5	A new adoption strategy: achieving excellence everywhere (2021)	197
D.5	Future trends	198
E.	OTHER CHILDREN'S AND YOUNG PEOPLE'S SERVICES	199
E.1	Leaving care support services	199
E.1.1	Leaving care demand trends	199
E.1.2	Spending on leaving care services	201
E.1.3	Policy and legislative drivers	202
E.1.3.1	Care leavers strategy: A cross-departmental strategy for young people leaving care (2013)	202
E.1.3.2	Education Select Committee: Into independence, not out of care: 16 plus care options (2014)	203
E.1.3.3	Public Accounts Committee, Care leavers transition to adulthood (2015)	203
E.1.3.4	Government response: Keep on caring (2016)	204
E.1.3.5	Staying Put and Staying Close: Enabling young adults to maintain supportive relationships	205
E.1.3.6	The use of unregulated accommodation for 16-17 year olds	206
E.1.3.7	Reducing the risk of homelessness among young people	207
E.1.3.8	Further support for care leavers	207
E.2	Safeguarding – social work, commissioning and strategy, and local safeguarding support	208
E.2.1	Social services referrals, children in need and Child Protection Plans (CPPs)	208
E.2.2	Spending on safeguarding	209
E.2.3	High usage of agency social workers	210
E.2.4	Outsourced/delegated social work activities	212
E.2.4.1	Supporting local authorities: Independent Children's Trusts and peer support	213

E.2.4.2	Financial performance	215
E.2.4.3	Improvement monitoring	215
E.3	Other children and young people's services	216
E.4	Future Trends	218
E.4.1	Family Help: A new support model for families	218
2.	INSPECTION AND REGULATION IN CHILDREN'S CARE AND PROTECTION	221
2.1	Quality and regulatory overview in England	221
2.1.1	Ofsted inspections of children's services providers	221
2.1.2	Safeguarding vulnerable children from abuse: regulatory changes	222
2.1.3	Ofsted inspections of local authority children's services functions	223
2.2	Covid-19 and the regulatory process	224
2.3	Regulatory overview in Wales	224
2.3.1	The Regulation and Inspection of Social Care (Wales) Act	225
2.3.2	The Social Services and Wellbeing (Wales) Act 2014	225
2.3.3	Proposals to eliminate profit from the care of looked after children	226
2.4	Regulatory overview in Scotland	226
2.5	Regulatory overview in Northern Ireland	227
2.6	Quality ratings and provider risk in England	227
2.6.1	Quality: Independent sector children's homes	230
2.6.1.1	Quality performance in 2022	230
2.6.1.2	Historic quality performance (2016–2021)	230
2.6.2	Independent sector performance compared to local authorities	233
2.6.3	Quality in fostering agencies	233
2.6.4	Quality in adoption agencies	234
2.6.5	Quality in local authority children's services	234
2.7	Regulation and inspection of special education services	236
2.8	Competition and Markets Authority	236
2.9	Future regulatory and inspection developments for children's care and wider children's services	236
2.9.1	Targeted inspections where risk is greatest	237
2.9.2	Regulation that recognises the importance of outcomes and personal experiences	237

2.9.3	A 'market oversight' scheme for children's homes	238
2.9.4	A focus on improving local authority children's services	239
2.9.5	A common approach to inspection across providers within a sector	239
2.9.6	A new universal set of flexible care standards	240
2.9.7	Common standards across health and care	240
2.9.8	A joined-up approach to inspection	241
3.	PAYORS	243
3.1	Children's and young people's services	243
3.2	Special (high needs) education	243
4.	MAJOR PROVIDERS	245
4.1	Overview of major providers	245
4.1.1	Integrated services for children and young people	245
4.1.2	Full spectrum service providers	247
4.1.3	For-profit provision across multiple services	248
4.1.4	Integrated services and commissioning	249
4.1.5	Service differentiation	249
4.1.6	Specialist service differentiation	250
4.1.6.1	Service specialisation: mental health	251
4.1.6.2	Service specialisation: transition support	251
4.1.6.3	Service specialisation: special education	252
4.1.6.4	Service specialisation after acquisition	252
4.1.7	Sector ownership	252
4.1.8	Concentration of major providers	253
4.2	Market leaders	256
4.3	Growth and consolidation of major providers	261
4.3.1	Organic growth	261
4.3.2	Sector consolidation	263
4.3.2.1	Foster care	263
4.3.2.2	Children's residential care and special education	264
4.3.3	Future growth	269

4.4	Financial profile	270
4.4.1	Profitability (for-profit companies)	270
5.	INVESTORS	275
5.1	Investment activity	275
5.2	Valuations	280
5.3	Historical activity	280
5.3.1	NFA/Outcomes First Group	282
5.3.2	Priory Group/Aspris	282
5.3.3	Cambian/CareTech	282
5.3.4	Kisimul Group	282
5.4	List of UK children's care and special education major equity investors	283
5.4.1	Antin Infrastructure Partners	283
5.4.2	Apposite Capital	283
5.4.3	Ardenton	284
5.4.4	Ashridge Capital	284
5.4.5	August Equity	285
5.4.6	Bridges Fund Management	285
5.4.7	CapVest	286
5.4.8	Charme Capital Partners	286
5.4.9	G Square Healthcare Private Equity	286
5.4.10	Graphite Capital	287
5.4.11	Sovereign Capital Partners	287
5.4.12	Stirling Square Capital Partners	287
5.4.13	Waterland Private Equity Investments	288
5.5	Competitions and Markets Authority investigations	288
5.5.1	Recent engagement with children's services M&A activity	288
5.5.2	Market study of children's social care and fostering provision	288
6.	MARKET POTENTIAL	293
	APPENDIX 1. GLOSSARY	297
	APPENDIX 2. UK GDP DEFLATOR	301

APPENDIX 3. REGULATORS	303
APPENDIX 4. TRADE BODIES AND ASSOCIATIONS	305
APPENDIX 5. MAJOR PROVIDERS	307
APPENDIX 6. FINANCIAL APPENDIX	349

LIST OF TABLES

Table ES1	Projected market value of children's services sector, £m, 2022/23	2
Table 1.1	Number of children in care (looked after children), UK, 2007–2021, and number of care applications received by CAFCASS, England, 2007/08–2010/21	25
Table 1.2	Children in care (looked after children) as a % of the under 18-year-olds population by region, and growth in under 18-year-olds penetration by region, 2016 and 2021	26
Table 1.3	Children and young people's social care services and special education spending (market value) in England, 2017/18-2020/21 & 2021/22-2022/23 projections, and in the UK, 2017/18-2022/23 (estimates)	39
Table 1.4	Gross spending on local authority children and young people's services (excluding Children's Centres), annual real growth, and real growth index, England, 2010/11–2020/21	42
Table 1.5	Share of children and young people's services spending by service type, England, 2013/14 and 2018/19	44
Table A.1	Pupils attending and spending (market value) on special schools and special colleges by sector, England, March 2022, UK whole market spending estimate, 2022	52
Table A.2	Expenditure on high needs education by education sector and provider type, £000s, England, 2014/15–2020/21	73
Table A.3	Number of pupils with EHC plans/Statements of SEN by school sector, England, January 1995–January 2022	82
Table A.4	Number of pupils with EHC plans/Statements of SEN in independent special schools, England, January 2010–January 2022 (SEN2 returns and SLAC returns)	84
Table A.5	Number of pupils with EHC plans/Statements of SEN in other independent schools, England, January 2010 to January 2022	84
Table A.6	Regional (local authority) share of pupils with EHC plans/Statements and penetration of population in independent special schools, other independent schools, and non-maintained special schools, England, 1 January 2021	85
Table A.7	SEN penetration of all school pupils– SEN pupils with EHC plan/Statement and SEN pupils without EHC plan/Statement by sector, England, January 2001–January 2022	89
Table A.8	Number of independent special schools and special colleges and places offered by sector (for-profit and not-for-profit), by groups and non-groups, and occupancy (as implied by Department for Education Register of Schools and Colleges and Ofsted), England, 2022/23	101
Table A.9	Share of independent special school places and special college places by region, %, England, 2022	104
Table A.10	New openings of independent special schools by year, England, 2013–2021	105
Table A.11	Distribution of Ofsted quality ratings (most recent) for independent special schools and special colleges, by for-profit/not-for-profit status	107

Table B.1	Number of children looked after in residential care homes at 31 March, UK, 2011-2021 (including estimates for England, Scotland, Wales and Northern Ireland)	115
Table B.2	Time spent in placement which ceased in children's homes (including secure units and hostels), England, 2011/12-2020/21	119
Table B.3	Children's home capacity by provider sector, England, 2005/06-2022	121
Table B.4	Children's home capacity by sector and type of home, England, 31 March 2022	121
Table B.5	Growth in children's homes and places by region, England, 31 March 2017 and 31 March 2022	123
Table B.6	Local authority gross spending on children's residential care, England (2009/10-2020/21 and 2021/22 projection) and UK (2013-2021 estimates and 2022 projection)	126
Table C.1	Number of children looked after in foster care in the UK and penetration of the under 18-year-olds population, UK (England, Scotland, Wales, and Northern Ireland), 2015-2021	152
Table C.2	Number of children looked after by foster carers sourced by Independent Fostering Agencies (IFAs) and IFAs share of total fostered children, Great Britain (England, Scotland and Wales), 2015-2021	153
Table C.3	Share of foster placements by region - local authority agencies, independent fostering agencies and total (including penetration of under 18-year-olds), England, at 31 March 2015, and local authority agencies, England, at 31 March 2021	156
Table C.4	Foster care fill rates for local authority agencies and Independent Fostering Agencies (IFAs), England, at 31 March 2015-2021	158
Table C.5	Duration of fostering placements ceasing during the year ending 31 March, England, 2014-2021	159
Table C.6	Local authority gross spending on foster care in England split by provider sector (2009/10-2020/21 and 2021/22 projection), and UK (2014-2021 estimates and 2022 projection)	162
Table D.1	Adoption orders in courts, England and Wales, 1998-2021, and adoptions from care, England and Wales, 31 March 2008-2021	186
Table D.2	Number of looked after children in adoption placements at 31 March, UK, 2015-2021	187
Table D.3	Children waiting to be adopted from care, and average time waiting for adoption, England, 31 March 2009-2021	188
Table D.4	Share of adoption orders in courts by adopted child age group, England and Wales, 2011-2021	190
Table D.5	The number of adoptions by leading voluntary adoption agencies, UK, 2015/16-2020/21	192

Table D.6	Local authority gross spending on adoption services for children and young people in England (2009/10–2020/21 and 2021/22 projection) and UK (2014–2021 estimates and 2022 projection)	193
Table E.1	Leaving care services eligibility grid	199
Table E.2	Number of children and young people aged 16+ leaving care (no longer looked after) and the number leaving to live independently with supportive accommodation during the year, England, 31 March 2015–2021	200
Table E.3	Local authority gross spending on leaving care support services for children and young people, England (2009/10–2020/21 and 2021/22 projection) and UK (2013–2021 estimates and 2022 projection)	201
Table E.4	Referrals to children’s social services, children in need, and Child Protection Plans, England, 2005–2021	210
Table E.5	Local authority gross spending on safeguarding, England (2010/11–2020/21 and 2021/22 projection) and UK (2013–2021 estimates and 2022 projection)	211
Table E.6	Local authority gross spending on other categories of children’s services, real growth and real expenditure index, England, 2011/12–2020/21	217
Table 2.1	Distribution of quality ratings across independent sector children’s homes, independent fostering agencies, and voluntary adoption agencies, England, 31 March 2012–2022	231
Table 2.2	Distribution of Ofsted quality ratings for independent sector (private/voluntary) children’s homes and local authority children’s homes, England, 31 March 2022	232
Table 2.3	Distribution of Ofsted quality ratings for independent sector (private/voluntary) children’s homes subject to a full inspection, England, 31 March 2022	232
Table 2.4	Ofsted ratings for local authority children’s services, England, 30 September 2016–31 March 2022	235
Table 4.1	Top 25 independent sector providers of children homes by number of homes, UK, mid-2022 (estimates)	254
Table 4.2	Leading providers of independent special schools and colleges, top 28 in order of capacity, England, at March 2022	255
Table 4.3	Leading providers of children’s care and special education services by revenue, UK, 2014–2021	257
Table 4.4	Council-owned independent providers of children’s care and special education services by revenue, UK, 2016–2021	260
Table 4.5	Consolidation deals in the children’s care and special education sector since 2014	265
Table 4.6	Profitability of (for-profit) leading providers of children’s care and special education – EBITDAR pre-tax profit/loss margins, %, 2018–2021	272
Table 5.1	Private equity investors in children’s care and special education sector – schedule of current investors	277

Table 5.2	Private equity investors in children’s care and special education sector – schedule of historic investors in the recent past	278
Table 5.2a	Private equity holdings of children’s services providers, UK	279
Table 5.3	Ownership history of Outcomes First Group: Investor-backed consolidation in the children’s services sector 2006–2019	281
Table 5.4	CMA children’s services investigations	289
Table 5.5	CMA recommendations to the children’s service market	290
Table A1	Implied GDP deflator at market prices, calendar year 2010–2021 and financial year 2009/10–2020/21	301

LIST OF FIGURES

Figure 1.1	Trends in numbers of looked after children, England, 1994–2021, and UK, 1998–2021	20
Figure 1.2	Trends in high needs expenditure, nominal and real (2020/21 terms), England, 2013/14–2020/21	21
Figure 1.3	Net change in numbers of looked after children by age group, England, 2011–2021	22
Figure 1.4	Net change in numbers of looked after children by type of placement, England, 2011–2021	23
Figure 1.5	Children and young people’s social care services (projections) and special education (estimates) market values, £m, for England by provider sector (independent sector and public sector (‘the state’)), 2022/23	40
Figure 1.6	Independent (private/voluntary) sector share of local authority children’s services spending by service type, England, 2020/21	41
Figure 1.7	Gross spending on local authority children and young people’s services (excluding Children’s Centres and Early Years) in nominal and real terms, England, 2010/11–2020/21	43
Figure 1.8	Real expenditure (in 2014/15 terms) on high needs education by education sector and provider type, £bn, England, 2014/15–2020/21	45
Figure A.1	Special school demand trends by sector (public and independent), England, 2007–2022	51
Figure A.2	Breakdown of special education by provider sector, market share by volume and value, England, 2022	53
Figure A.3	Number of children with EHC plans attending school (daily), England, 11/09/2020–17/03/2022	54
Figure A.4	Allocation of Dedicated Schools Grant before deductions, 2022/23	69
Figure A.5	Trends in high needs expenditure, £m, 2014/15–2020/21	72
Figure A.6	High Needs Block budget, 2020/21–2022/23, and projections at 3%, 5% and CAGR of prior three years, £bn, 2023/24–2024/25	75
Figure A.7	Pupils with EHC plans/Statements of SEN by type of school pupil is attending, England, January 1995 to January 2022	81
Figure A.8	Number of pupils in independent special schools and other independent sector schools with EHC plans/Statements of SEN, England, January 2016–January 2020 (School Level Annual Census Returns)	83
Figure A.9	Pupil profile – distribution of pupils in maintained and non-maintained special schools by category of need, England, January 2022	87
Figure A.10	Net change in distribution of pupils in maintained and non-maintained special schools by main categories of need, England, January 2012–January 2022	87

Figure A.11	Distribution of pupils in maintained and non-maintained special schools by main categories of need as percentage of total, England, January 2010–January 2022	88
Figure A.12	SEN penetration of all SEN pupils with EHC plan/Statement and SEN pupils without EHC plan/Statement, by sector, England, January 2001–January 2022	90
Figure A.13	Share of school pupils with EHC plans/Statements for England, Wales and Northern Ireland, 2006/07, 2011/12, 2016/17 and 2021/22	91
Figure A.14	Regional (local authority) share of pupils with EHC plans/Statements in specialist colleges, England, 1 January 2022	92
Figure B.1	Distribution of children looked after by type of home (or equivalent), England, 31 March 2016 and 31 March 2021	116
Figure B.2	Looked after children in registered children’s homes whether inside or outside council boundary, England, 31 March 2015–2021	117
Figure B.3	Children looked after in residential settings by provider sector, England, 2009/10–2020/21	118
Figure B.4	Share of places in children’s homes by region, England, 31 March 2022	122
Figure B.5	Expenditure on children’s homes by sector of placement, England, 2009/10–2020/21	125
Figure B.6	Average weekly price per looked after child in children’s homes derived by LaingBuisson, England, 2009/10–2020/21	129
Figure C.1	Volume share of primary placements provided by fostering households by type of household placement, England, 31 March 2021	150
Figure C.2	Children looked after in foster care by sector of placement, England, at 31 March 2009–2021	154
Figure C.3	Spending on foster care at 31 March by sector of placement, England, 2009/10–2020/21	163
Figure C.4	Average gross local authority spending (price) per looked after child placed in foster care – IFA and local authority (LA) agency (in-house), England, 2010/11–2020/21	164
Figure D.1	Court adoption orders, England and Wales, 2011 Q1 - 2021 Q4	187
Figure D.2	Number of children ceasing care (being looked after) with a special guardianship order by guardianship type, England, 2010/11–2020/21	189
Figure 4.1	Intervention services for children and young people care and special education: Independent sector provider opportunities	246
Figure 4.2	EBITDAR margin (for children’s services only) of largest major providers of children’s homes and special education, 2008–2021	271