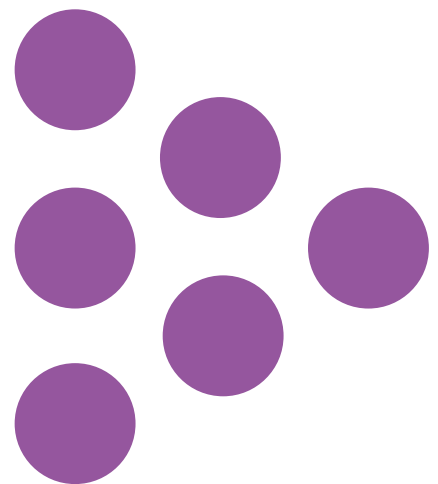

Report

Transitioning to a multi-academy trust led system: what does the evidence tell us?

National Foundation for Educational Research (NFER)



Transitioning to a multi-academy trust led system: what does the evidence tell us?

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The views expressed in this report do not necessarily reflect those of any of the individuals or organisations acknowledged above.

Glossary of key terms

Academies – state schools that are independent from the local authority (LA) and directly funded by Government. Every academy is required to be part of an academy trust, which must be run as a not-for-profit. They cannot be run for financial profit and any surplus must be reinvested in the trust. Many academies operate as multi-academy trusts, while others run as single academy trusts (DfE, 2017).

Converter academies – LA maintained schools that apply to the Government to become an academy. They are typically high performing (NFER, 2015).

Faith schools – schools with either a formal designated faith character or a faith ethos. Schools with a faith ethos do not have a formal faith designation but do have formal links to a faith body. Faith schools can be either LA maintained or academies (Long and Danechi, 2019).

Multi-academy trusts (MATs) – an academy trust which is responsible for a number of academies. Setting up a MAT typically involves two or more ‘founder’ schools forming a trust together which other schools may join later. However, some MATs have been established by an individual school with the potential for other schools to join it later. As a result, there are a small number of MATs that contain only one school (Association of School and College Leaders, 2019).

Single academy trusts (SATs) – an academy trust which is responsible for only one academy (DfE, 2017). In 2022/23 there were 174 single school MATs.

Sponsored academies – LA maintained schools that are academised to improve their performance with the support of a sponsoring organisation. They are typically underperforming (NFER, 2015).

Region – for this analysis, regions were defined by the Government office regions. These match the newly formed regional director regions. This is unlike the former regional school commissioner regions which did not align with government office regions.

Regional directors (formerly regional schools commissioners) – leaders in education appointed to act on behalf of the Secretary of State for Education across nine regions in England. Their core responsibilities include addressing underperformance in schools and managing the creation and growth of academy trusts (Department for Education, 2022e).

Re-brokerage – a process in which an individual academy is transferred into a new trust by their regional director due to concerns about the performance of the academy or the trust which is currently responsible for it (Department for Education, 2017).

Executive Summary

Over the last two decades, the school system in England has evolved from a local authority (LA) led-system to a system in which today nearly half of all schools have been academised. As academisation has progressed, the Government has promoted the formation of multi-academy trusts (MATs) (House of Commons Education Committee, 2017; Department for Education, 2022k).

In March 2022, the Schools White Paper set out the ambition for all schools to be in a ‘strong’ MAT with at least ten schools or 7,500 pupils by 2030 (Department for Education, 2022f). It also outlined proposals to allow LAs to establish new MATs in areas where too few ‘strong’ trusts currently exist. This was followed by the introduction of a new Schools Bill to Parliament, intended to create the legal basis for regulating all trusts (UK Parliament, 2022), and the start of a regulatory review looking at how ‘strong’ trusts should be identified, how new trusts are commissioned and how trusts should be regulated (Department for Education, 2022a). However, the Bill created controversy and has now been dropped in its current form (Belger, 2022b; Whittaker, 2022).

This has been coupled with substantial political change: five different education secretaries have been in post since the 2022 Schools White Paper was launched (Walker, 2023). A new government is now in place and has committed to pursuing the ambitions outlined in the White Paper, but it is not clear to what extent this will be supported by new legislation (Belger, 2022b).

This report provides new insights into the current MAT landscape by investigating how the mainstream school system has evolved so far. It sheds light on the key potential considerations and challenges in either pursuing an all-MAT system or in maintaining the current status quo, although it does not consider whether the ambition for a MAT-led system is desirable in itself. Finally, the report explores the role of LAs within the current school system and their views on the recent academisation policy proposals.

Our research draws on a mixed-methods approach, combining quantitative analysis of Department for Education (DfE) data and analysis of a survey administered to directors of children’s services¹ in September 2022, which achieved responses from in one in every five English LAs.

It is important to note that the quantitative analysis presented throughout this report is largely descriptive and is not intended to be used to make causal inferences. A degree of caution is also needed when interpreting the survey analysis due to the small sample size.

¹ While the majority of survey responses were from directors or assistant directors of children’s services in LAs, a small number of responses were provided by individuals working in other roles within education and children’s services in their LA. See Appendix for further details.

What does the current school landscape look like?

Academisation and trust size

Just under half of all mainstream schools in England have academised

About 53 per cent of all mainstream schools remain LA maintained. Only two-fifths of primary schools are academies compared to four-fifths of secondary schools.

More than half of academies are in trusts of fewer than ten schools

Secondary academies (at 64 per cent) are more likely than primaries (at 49 per cent) to be in trusts with fewer than ten schools, including single academy trusts (SATs). One in four secondary academies are in SATs*.

This is despite the fact that trusts have grown in size in recent years

Since 2015/16, the proportion of schools in trusts with at least ten schools has more than doubled, while the proportion of schools in single academy trusts* has shrunk by almost two-thirds.

*This includes SATs and a small number of MATs that only have one school. See the glossary for further details.

A varied regional landscape

There are important differences in the extent of academisation across regions

Most regions in England have academised over half of their schools. The exceptions are the North West, London and the South East, where the majority of schools remain LA maintained.

The size of trusts that schools are in also varies considerably across the country. The East Midlands, the South West and Yorkshire and the Humber are the only regions in which more than half of academies are part of a MAT with at least ten schools. In comparison, less than a third of schools are in MATs with ten or more schools in London and the North West.

Trusts are typically concentrated within a region

Most trusts (87 per cent) with at least two schools have all their schools located in a single region. Only the largest trusts are more geographically dispersed, yet a third of MATs with more than 30 schools still operate in a single region.

Performance and school trusts

Where performance is measured on the basis of Ofsted outcomes and attainment data

Most underperforming schools have now been academised

About 14 per cent of schools in MATs have an inadequate or requires improvement Ofsted rating, compared to around seven per cent of LA maintained schools. This reflects the fact that most underperforming schools have now been moved into MATs as per Government policy.

There are currently less than 300 LA maintained schools who meet the criteria for intervention, albeit more schools may become eligible over time.

Trust quality varies across regions

While many trusts are high performing, nearly one in ten trusts with two or more schools still have over half of their schools rated as inadequate or requires improvement by Ofsted. These lower performing trusts typically have fewer than ten schools.

Academies in the West Midlands and East of England are more likely to be in lower performing trusts.

How have schools historically moved into and between trusts?

The expansion of academisation has primarily been driven by converter academies

Among primary schools, there have been two periods of rapid academisation, both driven by converter academies. The first was catalysed by the 2010 Academies Act, and the second by the 2016 Schools White Paper. Among secondary schools, most schools had academised by 2012/13. Since this initial surge of academisation, a comparatively small number of secondary academies have opened year-on-year². Growth in academisation across both primary and secondary academies has slowed in recent years, partly due to the Covid-19 pandemic.

While academies are more likely to join larger trusts than they were in the past, smaller trusts also have an important role to play in building system capacity³

In 2021/22, about half of all new converter academies and sponsored academies became part of a MAT with less than ten schools. In the same year, almost two-thirds of single academy trusts (SATs) becoming part of a MAT joined a MAT of this size. This highlights the importance of drawing on trusts of all sizes to build MAT capacity.

Schools are highly likely to join a trust with a presence in their local authority

Schools are highly likely to join a MAT that already has a school in the same local authority. For example, among the schools who converted in 2021/22, around four-fifths joined a trust which already had a school within the same local authority. The proportion of converter academies joining a local MAT has increased year-on-year.

What patterns of movements into and between trusts might we see in the future?

The academisation of key groups of schools

Faith schools are a key block of schools yet to extensively academise

Almost a third of schools in England have a faith ethos or designation. To date, both primary and secondary faith schools have been slower to academise than their non-faith counterparts. Increased faith protections for academies may encourage more faith schools to academise and join a MAT in future (as discussed in Section 4). While the Government has committed to passing new legislation to remove barriers that prevent faith schools joining trusts as a priority (Belger, 2022b), it is not clear when or how government might seek to make these changes given that the Schools Bill has now been dropped.

² From 2017/18 onwards, the majority of new academies were free schools and hence from this period the majority of brand-new academies are excluded from the analysis.

³ Where capacity refers to MATs being able to bring new LA maintained schools or SATs into their trusts. For example, having sufficient senior leader capacity across the MAT to support school improvement in the new school(s) joining the trust.

Trust mergers and re-brokerages

There is little precedent for trusts mergers. However, more trusts may need to merge if the Government pursues ambitions for all schools to be in a MAT of at least ten schools

Less than five per cent of trusts close each year and only around three-quarters of these closures are the result of trusts merging. Given that more than half of academies are in trusts with fewer than ten schools and that the Government has indicated the desire for trusts to grow by consolidating together (Department for Education, 2021), it may consider facilitating an increase in the rate at which trusts merge as a way of rapidly growing smaller trusts to the desired size of at least ten schools.

Academies are, on average, re-brokered 3.4 years after joining their trust

Each year, a small number of schools are re-brokered by their regional director and join a new MAT. Re-brokered schools are highly likely to be underperforming schools (as measured by Ofsted ratings and attainment outcomes). These re-brokerages typically happen shortly after the end of the three-year grace period which trusts are given when a sponsored academy joins a trust⁴. There is also considerable regional variation in how long schools are given before being re-brokered (see Section 4.2 for further details).

The creation of LA established MATs

Our survey found that LAs are largely in favour of being able to establish their own MATs, despite generally being ambivalent about the Government’s White Paper academisation plans

Around two-thirds of responding LAs were in favour of being able to establish their own MATs, while only six per cent were in favour of the Government’s aim for all schools to be in a ‘strong’ MAT of at least ten schools or 7,500 pupils by 2030. Furthermore, while over two-thirds (65 per cent) of respondents reported that their LA was somewhat or very interested in establishing their own MAT, only 39 per cent of LA respondents felt their LA was likely to begin the process of establishing their own MAT within the next three years.

The disparity in the level of interest among LAs in establishing a MAT and those who feel their LA is likely to begin this process may be due in part to concerns among LAs about their ability to fund the process and their understanding of what would be involved. Surveyed LAs were also not in favour of only allowing LA established MATs in areas with insufficient capacity among existing ‘strong’ trusts. Allowing LAs to establish MATs irrespective of existing ‘strong’ trust capacity in the area may be a way which government can encourage more resistant schools to academise and/or join a MAT, particularly if their relationship with the LA is the main reason for their reluctance to academise.

⁴ During this three-year period, the sponsored school is exempt from routine Ofsted inspections and the school’s performance data does not count towards the trust’s data.

What are the key challenges in shifting to an all-MAT system?

➤ A long way to go

Shifting to an all-MAT system would require the substantial number of schools who currently remain LA maintained or in SATs to join MATs. For example, were the Government to pursue a target such as that laid out in the original 2022 Schools White Paper for an all-MAT system by 2030, 25 LA maintained mainstream schools and three SATs would need to join a MAT each week. Pursuing rapid trust growth of this nature risks creating issues for trust quality, as it did during the initial rapid expansion of MATs (Eyles, Machin and Silva, 2018), or schools rushing to join a MAT which may not be an appropriate match.

➤ Attracting schools to join a suitable MAT

There remain questions as to how likely the remaining LA maintained schools and SATs, who have had the option to academise and join a MAT for many years, are to join a MAT going forward. While the Schools White Paper has renewed interest in academisation (National Governance Association, 2022), there may be continued resistance. Over half of the LAs responding to our survey said that maintained schools and SATs in their LA were opposed to joining a MAT. A number of LAs in our survey also highlighted that some faith schools did not want to join the MAT that their relevant religious authority would consent for them to join and felt that this would be a significant challenge for academisation⁵.

➤ Will some schools be left behind?

There are many reasons why some schools may not be attractive to a MAT or may struggle to find a suitable MAT. For example, small, rural schools often face acute financial challenges and unique circumstances which established MATs have less experience of managing (Department for Education, 2019). Four-fifths of LAs responding to our survey were concerned that some schools in their area risked being left behind as MATs would be reluctant to take them on.

➤ The optimal size of a MAT

The Government’s ambition for all schools to be in a MAT of at least 10 schools, or 7,500 pupils is based on the argument that larger MATs benefit from economies of scale in terms of education outcomes and financial management, for example, and that a system with more scale will be easier to regulate (Department for Education, 2022k). While there may be a theoretical argument for larger trusts, there is a lack of evidence on the optimal size of a trust for achieving good pupil outcomes and financial efficiency.

➤ Challenges facing specific schools

The English school system is complex and there are numerous examples of school groups and structures for whom academisation poses specific challenges (such as faith schools or federated schools). These schools face particularly complex considerations if and when they come to academise which may require tailored and distinct approaches to academisation.

⁵ Based on open responses to the questions “Aside from additional funding, what one thing could the Government provide to support LAs with their academisation plans?” and “In relation to education, what are the biggest challenges facing your local authority at the present time?”

➤ **A complex regional picture**

Due to the stark differences in the regional academisation rates of mainstream schools, trust make-up and in the performance of trusts, the challenge of creating sufficient capacity within MATs is intensified at a local level. There remains the question of whether some LAs are potentially nearing a ‘tipping point’ of academisation in terms of financial viability and system efficiency. For example, the 29 per cent of LAs who have over 90 per cent of their mainstream schools academised may be approaching such a threshold. That said, less than a tenth of surveyed LAs felt it was no longer financially viable to retain their LA schools and most surveyed LAs reported they were not in favour of powers to force their remaining maintained schools to academise.

➤ **Funding, time and competing priorities**

Academisation involves costs for LAs, schools and trusts. In September 2022, LAs that we surveyed highlighted that schools and LAs already face major funding challenges and that they would need additional funding to support more schools academising each year. While the Government has since announced an additional £2.3bn for schools in 2023/24 and 2024/25, there is no new money for the current financial year, and it is not clear whether the increased funding will be sufficient to meet the scale of current pressures.

LAs were also concerned that academisation would divert attention and funding from other pressing priorities, such as special educational needs and disabilities (SEND) provision, Covid-19 recovery and planning for the imminent demographic decline in primary pupil numbers. Conversely, funding challenges may also prove to be a catalyst for academisation. For example, schools facing financial challenges may seek to academise to reduce costs.

➤ **The role of LAs**

Surveyed LAs were concerned about the implications of government proposals on their responsibilities and powers in future and want more clarity about their roles going forward. Some LAs noted that academisation may also compromise strong networks of school support that already exist in their areas. They raised concerns that some schools may stop engaging with local school improvement networks once they join MATs.

The most significant education related challenges reported by LAs at the time of the survey relate to ensuring SEND pupils have appropriate support in the most appropriate setting and planning for the current demographic decline in primary pupil numbers. These are both areas where LAs’ formal powers have not kept pace with academisation. For example, while an LA can ask a trust to close or reduce their roll to help accommodate demographic changes, school trusts are not compelled to accept the request. LAs also highlighted the need for greater inclusivity and cooperation within the school system.

➤ **A regulatory framework for trusts**

Given the substantial regional disparity in trust performance and that most failing schools have now been academised, there is a clear need for a national regulatory framework for trust performance. While the DfE has a diagnostic framework to identify MAT capacity (Department for Education, 2022c), it is not clear how this will be translated to a framework which can adequately assess trust quality. This is crucial for driving capacity to support full academisation and ensuring that lower performance within trusts is improved going forward.

A fundamental challenge is how ‘strong’ trusts should be identified and this is the focus of the regulatory review currently being undertaken by government. An additional core challenge for establishing a regulatory framework will be ensuring that it can be implemented in accordance with trusts’ funding agreements, the terms of which are dependent on when a trust was established. For example, it may require trusts to accept amendments to their funding agreements. The ongoing regulatory review is set to address these questions, though the review – which was set to conclude by December 2022 – has yet to publish its recommendations (Department for Education, 2022a). It is key that this review is prioritised going forward in order to support the development of an effective national regulatory framework.

Conclusions

This report highlights that the ambition to rapidly transition to an all-MAT system, where all schools are in a ‘strong’ trust of at least ten schools, would require schools to join MATs and trusts to merge at an unprecedented scale. Given the many factors to consider, the Government should prioritise a slower transition that allows more time to build MAT capacity and to ensure the transition is supported by the commensurate resources and policy solutions to facilitate all schools joining a ‘strong’ MAT. It is also important to recognise that there are important issues that the Government will need to work through even if the current status-quo is maintained. This includes completing the ongoing regulatory review and establishing an appropriate regulatory framework, defining and supporting the development of ‘strong’ trusts and ensuring that LAs have powers which match their responsibilities.

Recommendations

1. **The evidence suggests rapidly achieving a high-quality all-MAT system is not possible without appropriate resources, policy solutions (including those covered by the regulatory review) and building sufficient MAT capacity.**

Without the commensurate resources, policy solutions and political will, the proposed pace and timing of system change risks creating issues for trust quality, creating significant upheaval for the system and distracting from other pressing policy priorities such as Covid-19 recovery. The Government should prioritise a slower transition which addresses existing system issues ahead of rapid system change. These include developing a suitable regulatory framework, providing a clear and transparent framework for how a ‘strong’ trust can be identified and facilitating school improvement within MATs. Additional consideration is also needed to address the issues facing particular groups of schools (such as faith schools) and how to ensure that no schools are left behind.

2. **The Government needs to ensure LAs have commensurate powers and resources to match their responsibilities.**

LAs are facing significant challenges in ensuring pupils are placed in the most appropriate settings and planning for the demographic decline in primary pupils. However, their powers in these areas have not kept pace with the expansion of academisation. LA powers need to be enhanced to ensure LAs can fulfil their ongoing responsibilities effectively in an increasingly academised system.

3. **More evidence is needed on what makes for a ‘strong’ trust.**

It is increasingly important to have high-quality evidence on what makes for a ‘strong’ trust. For example, while there is a theoretical argument for larger trusts, there is currently a lack of evidence on the optimal size of a trust for good pupil and financial outcomes.

1 Introduction

Over the last two decades, the school system in England has evolved from a local authority (LA) led-system to a system where nearly half of all schools are academies, which are run independently from the LA. Every academy is part of an academy trust which must be run as a not-for-profit company.

The academisation of schools began gradually, however the passage of the Academies Act in 2010 triggered a rapid expansion in the number of academies and trusts within the school system, particularly between 2011 and 2016. While academisation and trust growth has continued, this expansion has slowed in recent years, partly because of the Covid-19 pandemic. As academisation has progressed since 2010, the Government has promoted the formation of multi-academy trusts (MATs) (House of Commons Education Committee, 2017; Department for Education, 2022k). Today, nearly half all schools have been academised and 87 per cent of academies are now part of a MAT.

In March 2022, the Schools White Paper set out the ambition for all schools to be in a ‘strong’ MAT with at least ten schools or 7,500 pupils by 2030 (Department for Education, 2022f). It also outlined proposals to allow LAs to establish new MATs in areas where too few ‘strong’ trusts currently exist. Following the publication of the 2022 Schools White Paper, a new Schools Bill was introduced in parliament which was intended to create a consistent legal basis for regulating all academy trusts (UK Parliament, 2022). A regulatory review was also launched to look at how ‘strong’ trusts are identified, how new trusts are commissioned and identify how trusts should be regulated (Department for Education, 2022a). However, the Bill created substantial controversy and has now been dropped in its current form (Belger, 2022c; Whittaker, 2022).

This has been coupled with substantial political changes: five different education secretaries have been in post since the White Paper was launched (Walker, 2023). A new government is now in place and has committed to pursuing the ambitions outlined in the 2022 Schools White Paper, but it is not clear to what extent this will be supported by new legislation (Belger, 2022b).

This report provides new insights into the current MAT landscape by investigating how the mainstream school system has evolved so far. It sheds light on the key potential considerations and challenges in either pursuing an all-MAT system or in maintaining the current status quo, although it does not consider whether the ambition for a MAT-led system is desirable in itself. Finally, the report explores the role of LAs within the current school system and their views on the recent academisation policy proposals.

Our research used a mixed-methods approach, as detailed below.

- **Quantitative investigation of the MAT landscape and movement of schools into and between trusts**

Our quantitative analysis draws on a wide-range of administrative Department for Education (DfE) datasets to provide an overview of the current MAT landscape in mainstream state-funded schools and explores the historic patterns of movements into and between trusts across academic years that have shaped the current school landscape. This includes considering the role of trust size, geography, phase and performance in these movements.

- **Survey of LAs**

A short survey (including closed and open response questions) was administered to directors of children’s services⁶ in all LAs in England exploring their views on the Government’s White Paper academisation ambitions and proposals to allow LAs to establish new MATs, as well as the wider challenges they are currently facing in relation to education. A sample of 33 LAs was achieved, representing one in five local authorities in England. The achieved sample had good levels of representation across all regions in England and across LAs which had academised to different degrees.

It is important to note that the quantitative analysis presented throughout this report is largely descriptive and is not intended to be used to make causal inferences. A degree of caution is also needed when interpreting the analysis of the survey due to the small sample size. Further detail about the methodology can be found in the Appendix.

⁶ While the majority of survey responses were from directors or assistant directors of children’s services in LAs, a small number of responses were provided by individuals working in other roles within education and children’s services in their LA. See Appendix for further details.

2 The current school landscape

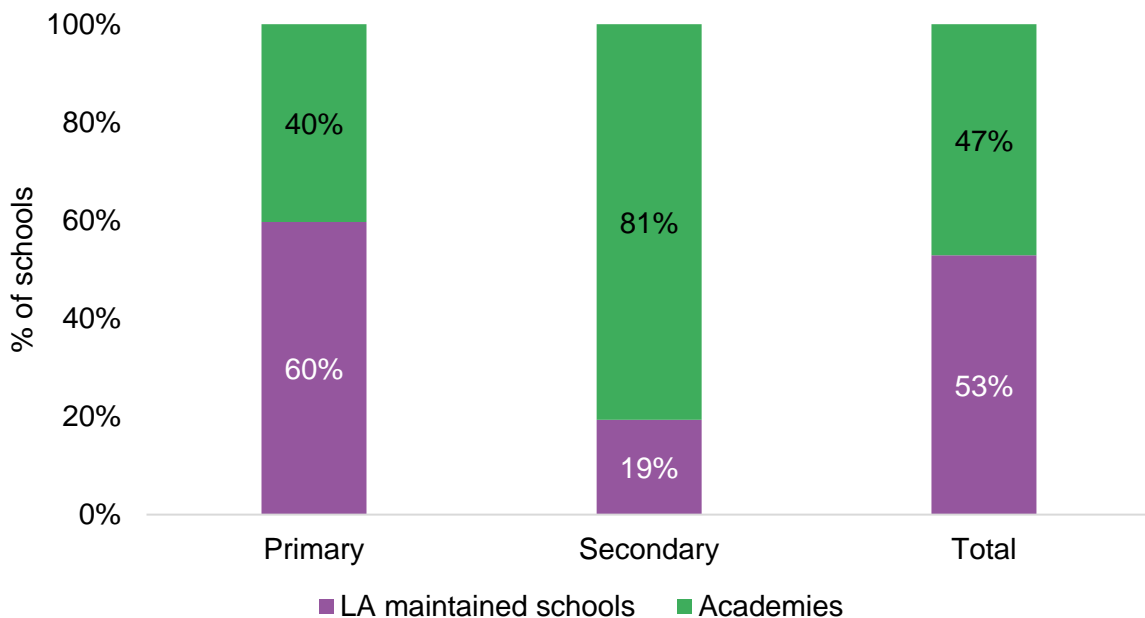
This section provides an overview of the current school and trust landscape. This includes exploring how the current landscape varies across regions and how school performance varies across different school types.

2.1 Overview

Just over half of all mainstream schools in England are yet to academise

As shown in Figure 1, 53 per cent of all mainstream schools remain LA maintained. This is largely driven by primary schools. Only two-fifths of primary schools are academies compared to four-fifths of secondary schools. For the primary sector especially, this highlights that a substantial number of LA maintained schools would need to academise to achieve an all-MAT system.

Figure 1 The mainstream school landscape by phase, 2022/23



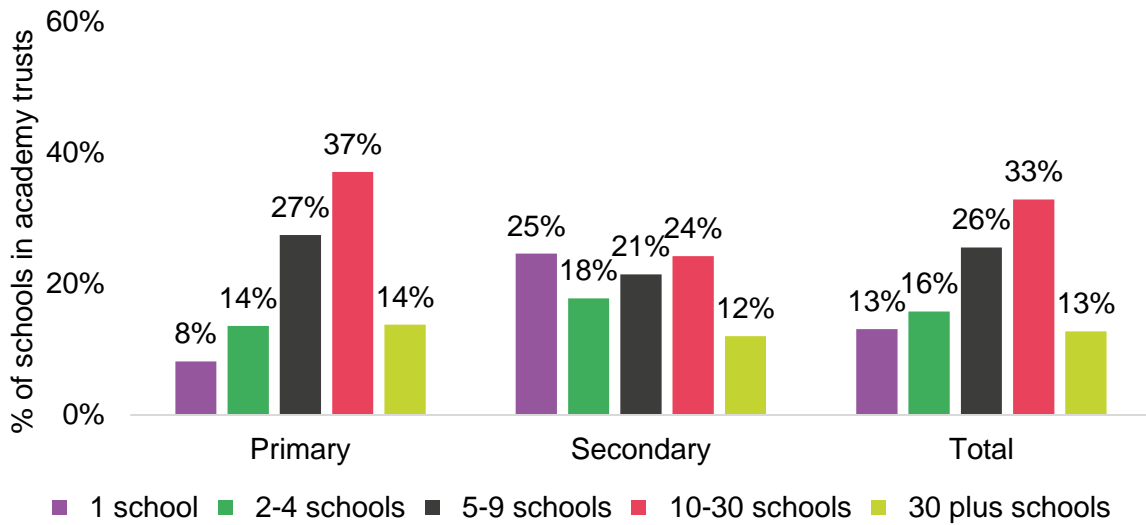
Source: NFER analysis of DfE data

Among those schools who have academised, over half are in trusts consisting of fewer than ten schools

As presented in Figure 2, this is primarily driven by secondary schools. Over half of primary academies are part of trusts with at least ten schools compared to only approximately a third of secondary academies. Additionally, one in four secondary academies are in a single academy trusts (SATs)⁷. The fact that more than half of academies are part of trusts with fewer than ten schools further highlights the significant number of trusts which would need to grow and/or merge with other trusts to meet the Government’s ambitions for all schools to be in a MAT with at least ten schools.

⁷ This includes SATs and a small number of MATs that only have one school. See the glossary for further details.

Figure 2 The share of schools in academy trusts by trust size and school phase, 2022/23



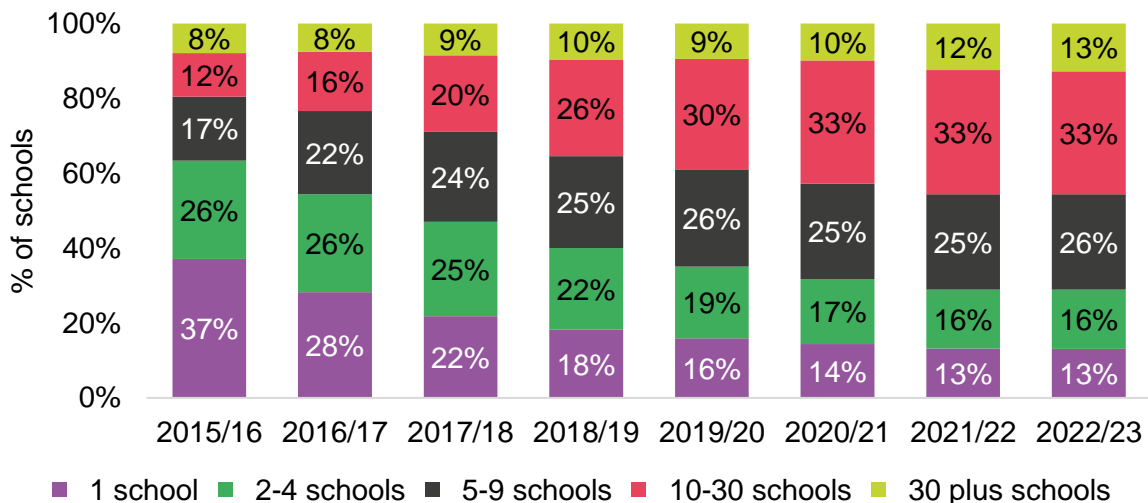
Source: NFER analysis of DfE data

Note: Trust size is based on all schools (including non-mainstream schools)

The proportion of schools in trusts with ten or more schools has increased over the years, while the share of SATs⁸ has declined

Figure 3 shows that since 2015/16, the share of schools in trusts with ten or more schools has more than doubled. In the same period, the proportion of schools in SATs has shrunk by almost two-thirds. This has been partly driven by a considerable number of schools in SATs joining larger MATs, especially between 2016/17 and 2018/19.

Figure 3 Share of schools by trust size and academic year, 2015/16 – 2022/23



Source: NFER analysis of DfE data

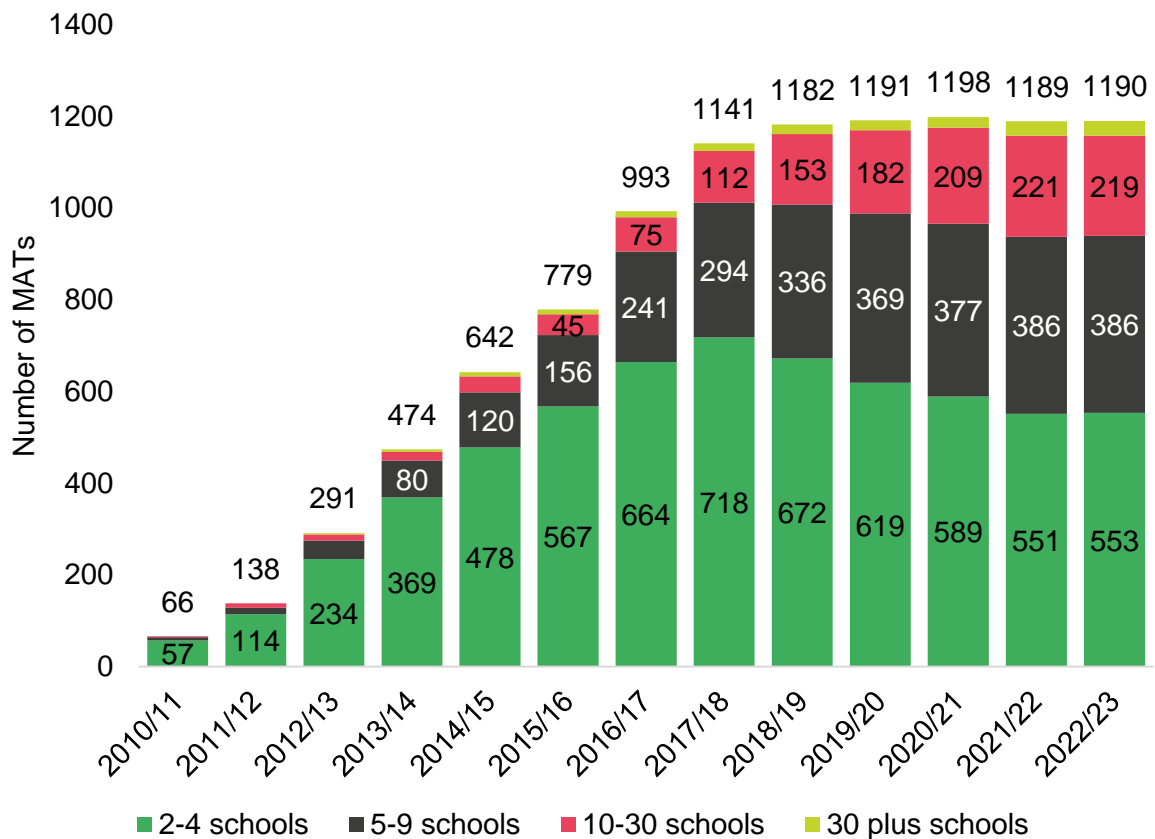
Note: Trust size is based on all schools (including non-mainstream schools)

⁸ This includes SATs and a small number of MATs that only have one school. See the glossary for further details.

While the number of large MATs has increased, the number of MATs in the system overall has plateaued since 2018/19

As shown in Figure 4, the number of MATs with at least two schools rose sharply between 2010/11 and 2017/18 but has since plateaued at around 1200 MATs. While the number of MATs overall has remained steady, the proportion of MATs with more than ten schools has increased. However, MATs with at least ten schools still only account for around a fifth of all MATs⁹ (although they are responsible for educating 39 per cent of mainstream pupils).

Figure 4 The number of MATs in England by trust size, 2010/11 – 2022/23



Source: NFER analysis of DfE data

Note: Trust size is based on all schools (including non-mainstream schools)

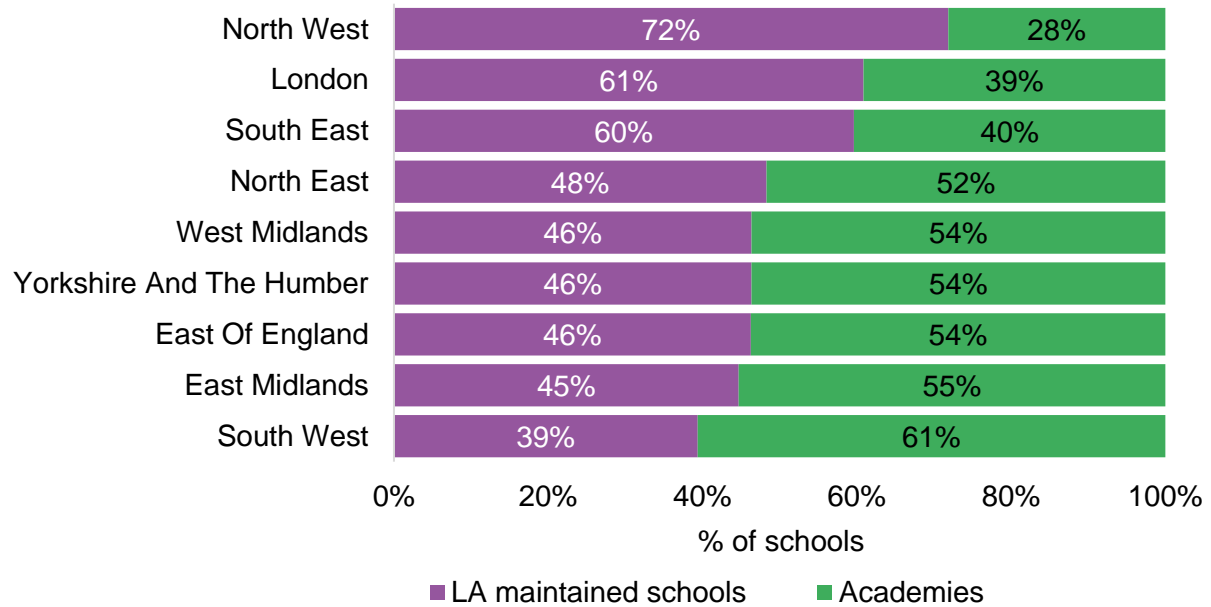
⁹ The distribution of MATs containing two to four schools and those containing five to nine schools are skewed towards having fewer schools. For example, among MATs with between two and four schools, 42 per cent contain two schools, 31 per cent contain three schools and 27 per cent contain four schools.

2.2 A varied regional landscape

There are large differences in the extent of academisation across regions

The majority of regions¹⁰ in England have academised over half of their schools. The only exceptions are the North West, where 28 per cent of schools are academies, and the South East and London, where only 40 and 39 per cent of schools are academies respectively.

Figure 5 The mainstream school landscape by region, 2022/23



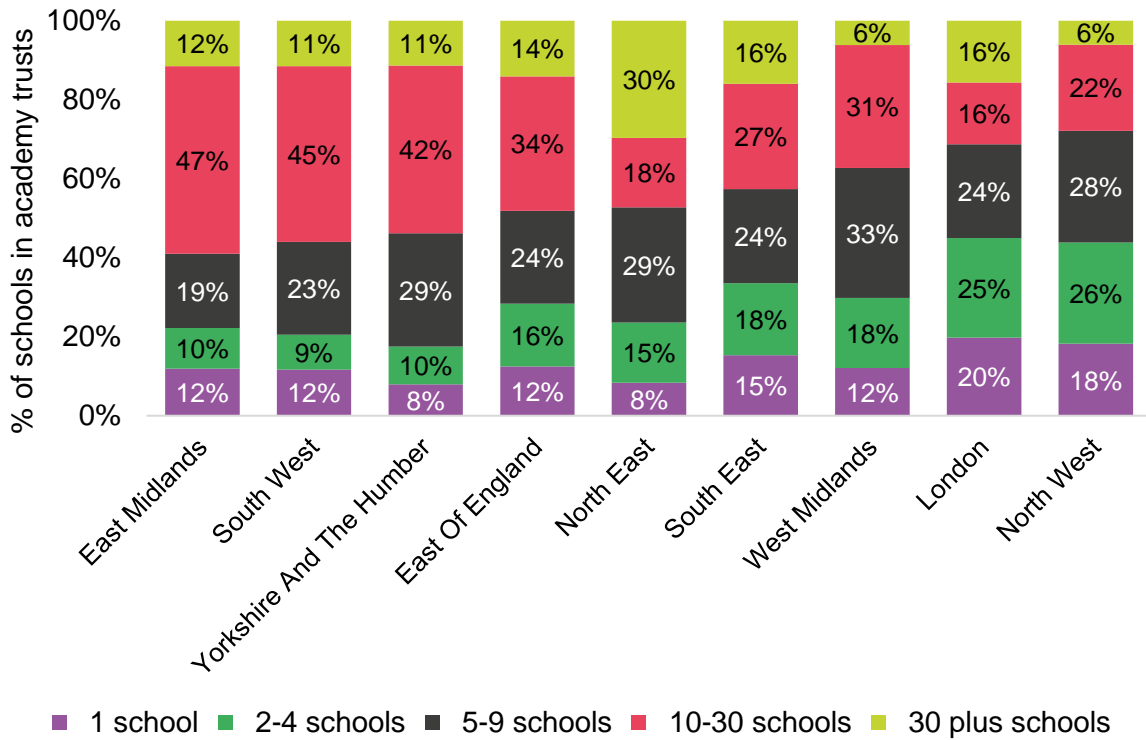
Source: NFER analysis of DfE data

There are also differences in the size of the trusts across the country

Figure 6 shows that academies in the East Midlands, the South West and Yorkshire and the Humber are more likely to be in trusts with at least ten schools than academies nationally. Conversely, academies in London and the North West are much less likely to be in trusts of ten or more schools, with less than a third of academies in trusts of this size. Together with Figure 5 above, this illustrates the need for a tailored regional approach to transitioning to an all-MAT system with trusts of the desired size.

¹⁰ The regions used in this analysis were defined by the Government office regions. These match the newly formed regional director regions. This is unlike the regional school commissioner regions which did not align with government office regions.

Figure 6 The share of schools in academy trusts by trust size and region, 2022/23



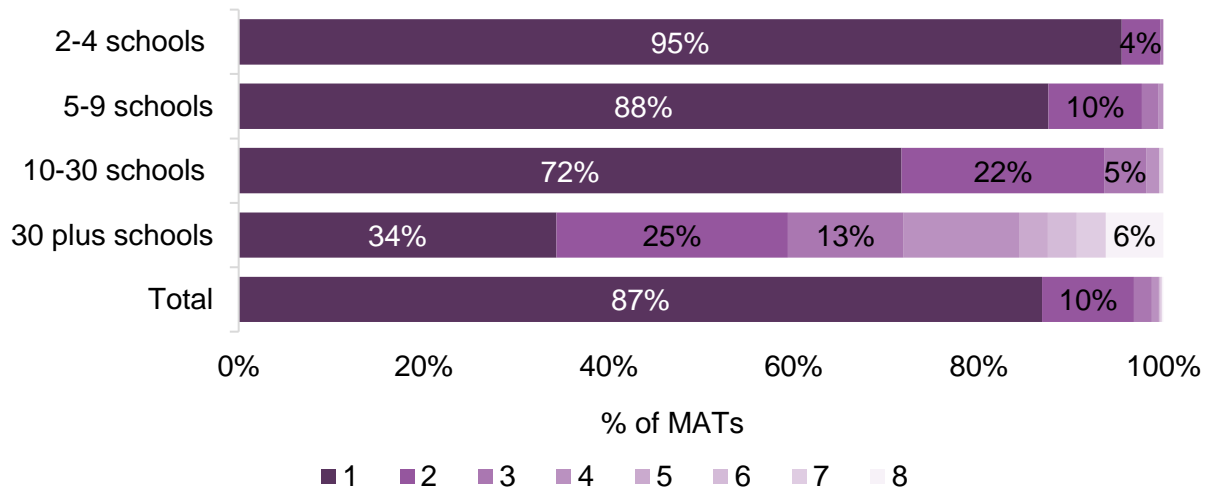
Source: NFER analysis of DfE data

Note: Trust size is based on all schools (including non-mainstream schools)

For the majority of MATs, all schools are located within the same region

The majority of trusts (87 per cent) have all their schools located within a single region, as shown by Figure 7. Only the largest trusts are more geographically dispersed – only a third of trusts with 30 or more schools operate in a single region. Analysis of the number of local authorities that trusts have schools in for the same year identified a similar pattern – 47 per cent of trusts have all of their schools located in the same LA while a further 23 per cent operate across two LAs. The remaining 30 per cent of trusts have schools spread across three or more LAs.

Figure 7 The number of regions trusts have schools in by trust size, 2022/23



Source: NFER analysis of DfE data

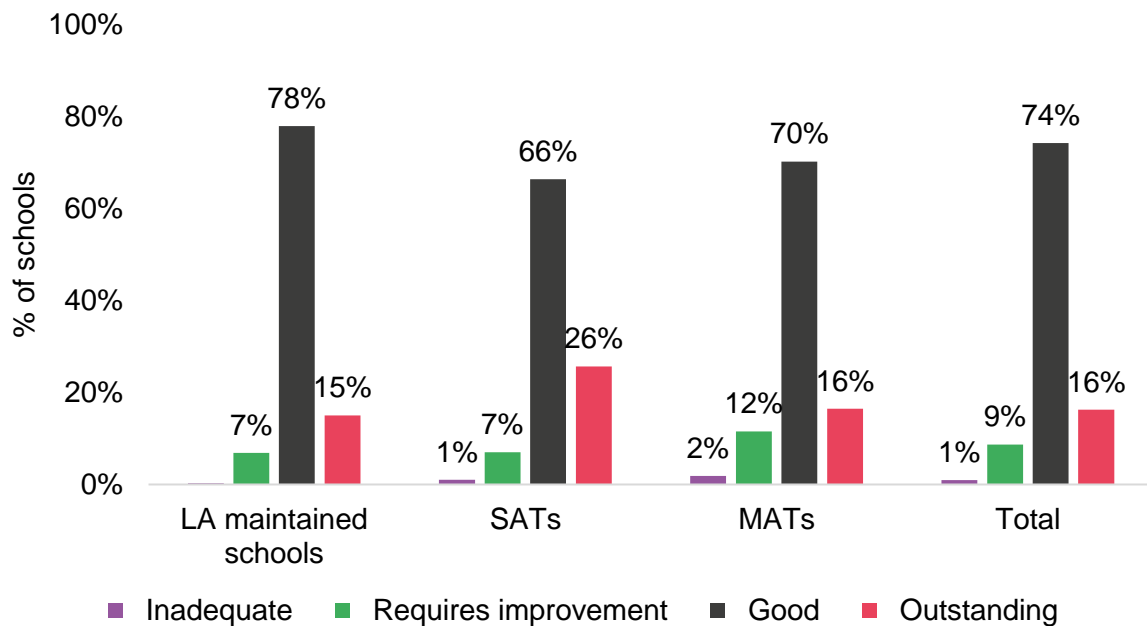
2.3 Performance and school trusts

Most underperforming schools have now been academised

Figure 8 shows that 14 per cent of schools in MATs have an inadequate or requires improvement Ofsted rating, compared to seven per cent of LA maintained schools. A similar pattern is observed for pupil attainment. This does not necessarily indicate that academies are less academically successful, but rather reflects the fact that most underperforming schools have now been moved into MATs as a result of government policy.

Since 2016, schools with inadequate ratings have been forced to academise (Department for Education, 2022k). This policy has now been extended to schools with two consecutive requires improvement ratings (Department for Education, 2022j). This raises important questions about whether there is sufficient focus on supporting school improvement for academies already within a trust.

Figure 8 Ofsted rating by school type, 2022/23



Source: NFER analysis of DfE data

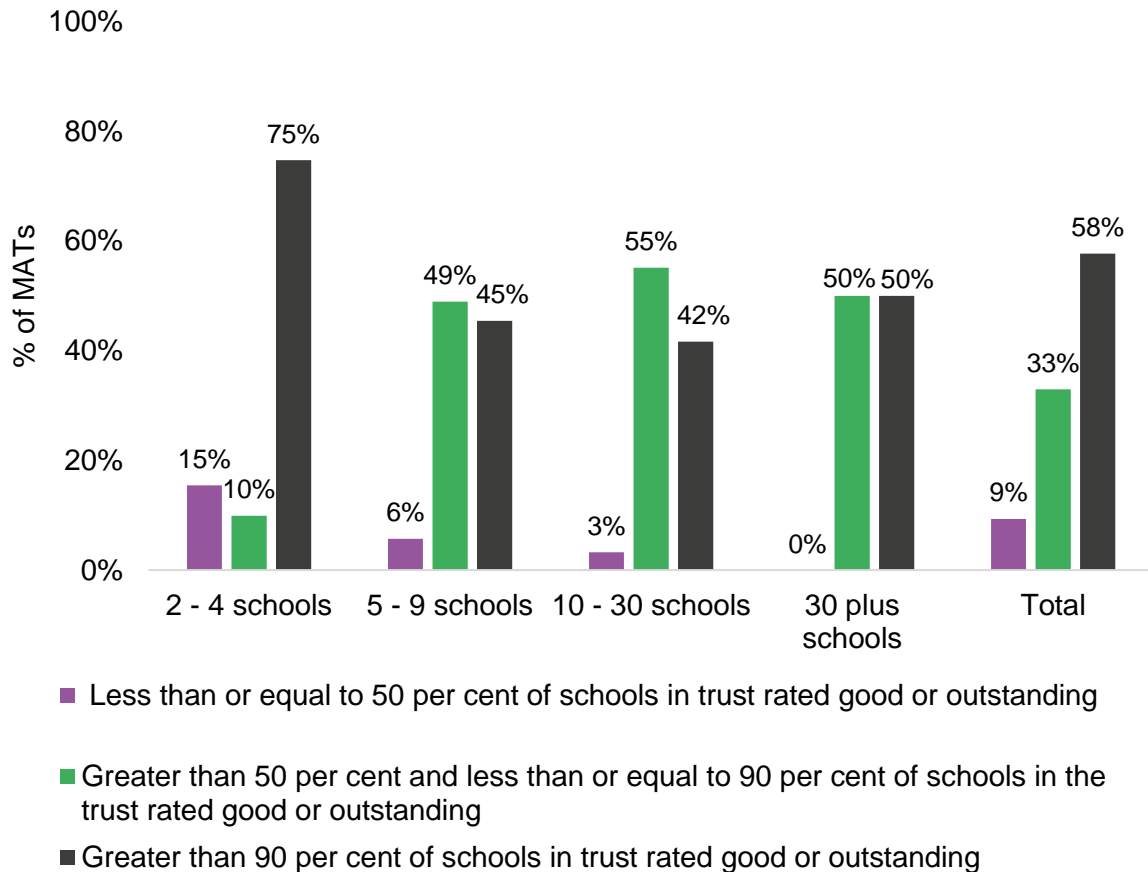
There are a small proportion of lower performing trusts, which are primarily relatively small-sized trusts

Although over half of all MATs have at least 90 per cent of their schools rated as good or outstanding, nearly one in ten trusts still have the majority of their schools rated as inadequate or requires improvement. Figure 9 shows that these lower performing trusts typically have fewer than ten schools¹¹. For example, while 75 per cent of MATs with between two and four schools have at least 90 per cent of their schools rated as good or outstanding, 15 per cent of MATs of this size have at least half of their schools rated as inadequate or requires improvement. However, it is

¹¹ Sensitivity analysis showed that this pattern of lower performing trusts typically having fewer than ten schools holds true over time and when the analysis is repeated only including schools who have been in their trusts for 5 years or more.

important to note that this analysis is descriptive and so it is not possible to say whether or not the size of the trust is a causal factor affecting trust performance¹². The fact that trusts with poorly performing schools are not uncommon highlights that academisation alone is not sufficient to support school improvement, and that some MATs may benefit from additional support for school improvement.

Figure 9 Ofsted performance for MATs by trust size, 2022/23



Source: NFER analysis of DfE data

Note: Trust size is based on all schools (including non-mainstream schools)

There are important differences in trust quality across regions

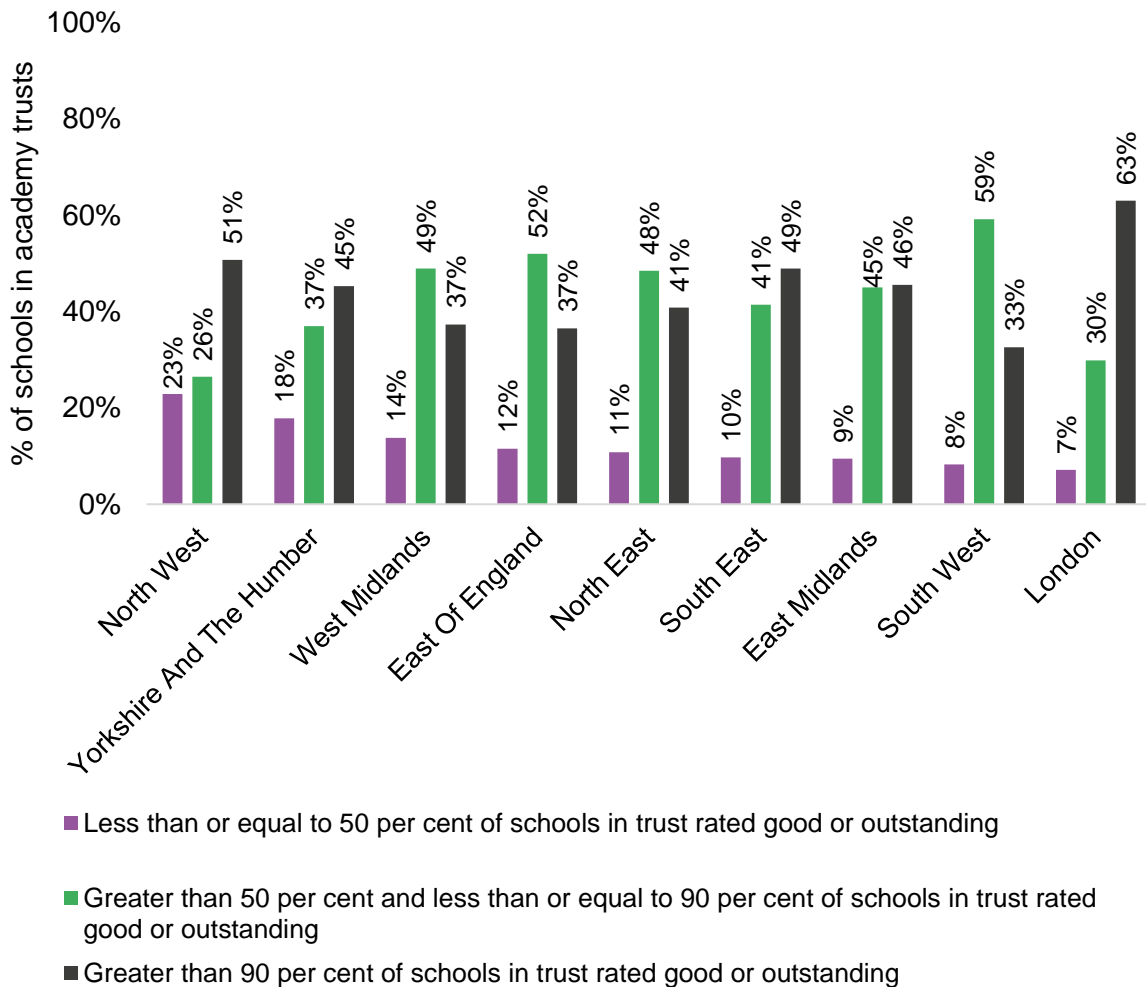
Figure 10 shows that there is complex regional variation across the country in the share of schools in trusts containing a large number of high-performing schools.

For example, the West Midlands and East of England have a relatively low proportion of academies in trusts in which almost all schools are rated good or outstanding by Ofsted and a comparatively high proportion in trusts in which fewer than half of schools have good or outstanding ratings. However, this is at least partly reflected by underlying regional differences. The West Midlands is also a region where comparatively fewer schools overall are rated as good or outstanding compared to other regions (87 per cent compared to 95 per cent in London and 92 per cent in the South East).

¹² There is currently a lack of evidence on the relationship between trust size and school outcomes (such as Ofsted rating or pupil outcomes). This is discussed further in Section 5.

Conversely, in the North West – which has a relatively low rate of academisation – while over half of schools are in trusts consisting almost entirely of schools rated good or outstanding, almost a quarter of schools in the region belong to trusts where less than half of schools have good or outstanding ratings. To achieve the ambition for an all-MAT system, some regions will need particular focus on growing capacity among stronger trusts and improving among weaker trusts, alongside wider regional school improvement work.

Figure 10 The share of schools in MATs by region and the percentage of schools rated as good or outstanding by Ofsted by region, 2022/23



Source: NFER analysis of DfE data

More evidence is still needed on what makes school trusts successful

To date, research has shown that academisation alone does not necessarily improve school outcomes (Department for Education, 2022k). While out of the scope of this research, there is a need for more evidence on what makes trusts successful, and what features are desirable for trusts, such as optimal size and organisational structures, for pupils’ attainment and financial stability.

3 The historical movements of schools in trusts

This section explores the patterns of movements in the schools who have joined trusts in the past and investigates the key characteristics of trusts which different schools join.

3.1 The movements of schools into trusts

Growth in academisation has primarily been driven by converter academies, but this growth has slowed in recent years

There are two main types of academies, converter academies and sponsored academies. Converter academies are mostly high performing LA maintained schools that apply to the Government to become an academy. Sponsored academies are typically underperforming LA maintained schools that are academised in order to improve their performance with the support of their sponsoring organisation (NFER, 2015).

Over the last decade, the rate of growth of academisation has varied by type and phase of school. As shown in Figure 11, for primary schools, an increasing number of schools became academies following the introduction of the 2010 Academies Act until 2013/14. This growth was primarily driven by converter academies, though a considerable number of sponsored academies were opened in 2012/13 and 2013/14. The 2016 Schools White Paper (Department for Education, 2016a) spurred another rapid increase in academisation between 2016/17 and 2018/19, with the number of schools academising peaking at over 900 schools in 2016/17. Since 2019/20, the rate at which primary schools are academising has slowed. It is likely that the disruption caused by the Covid-19 pandemic has contributed to this.

Among secondary academies, the majority had converted by 2012/13. Since this initial surge of academisation, a comparatively small number of secondary converter or sponsored academies have opened year-on-year. The Covid-19 pandemic also likely contributed to the overall fall in the number of secondary schools academising from 2019/20 onwards.

Given the pattern which followed the 2016 White Paper, the 2022 Schools White Paper may catalyse a renewed expansion in the number of academies. However, given the Schools Bill has now been dropped and that remaining LA maintained schools have resisted academisation for over a decade, the scale of this growth is unlikely to be comparable to that seen in the past.

Figure 11 The number of primary and secondary schools academising yearly by academy type, 2010/11 – 2021/22

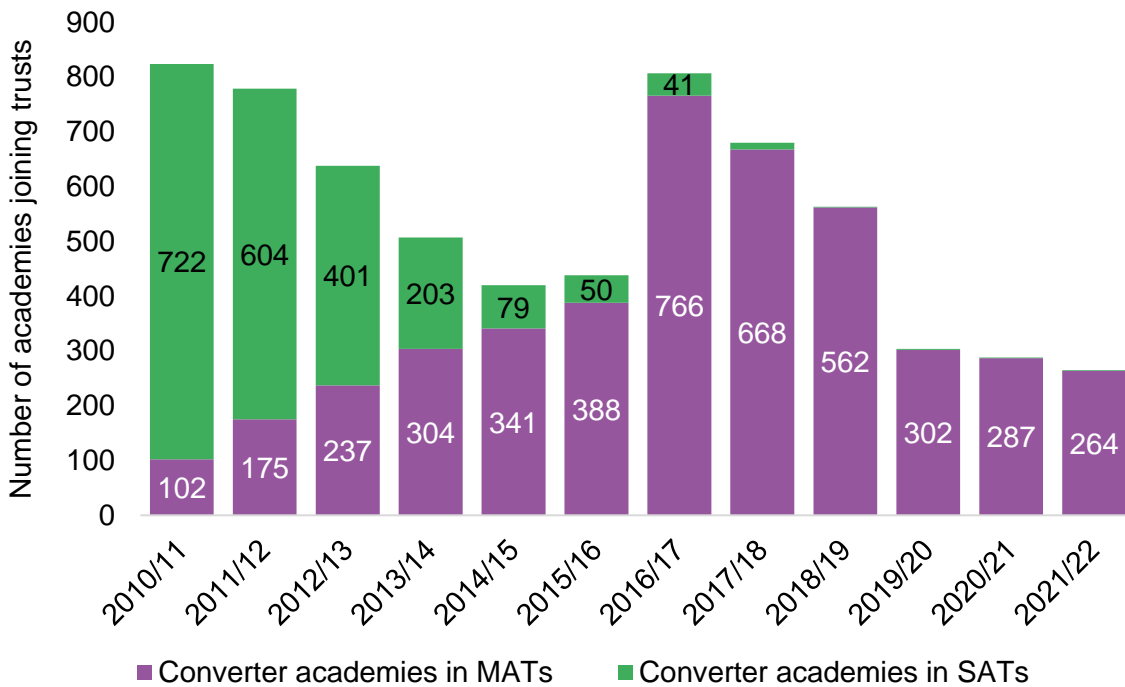


Source: NFER analysis of DfE data

Schools have increasingly joined MATs rather than SATs

There has been a noticeable shift towards academies joining MATs, which is consistent with the shift in government policy towards promoting MATs rather than SATs (House of Commons Education Committee, 2017). Whilst almost all new sponsored academies have consistently joined MATs, converter academies were much more likely to become SATs in the early 2010s. However, as presented in Figure 12, this is no longer the case.

Figure 12 The number of converter academies joining trusts each year by trust type, 2010/11 – 2021/22

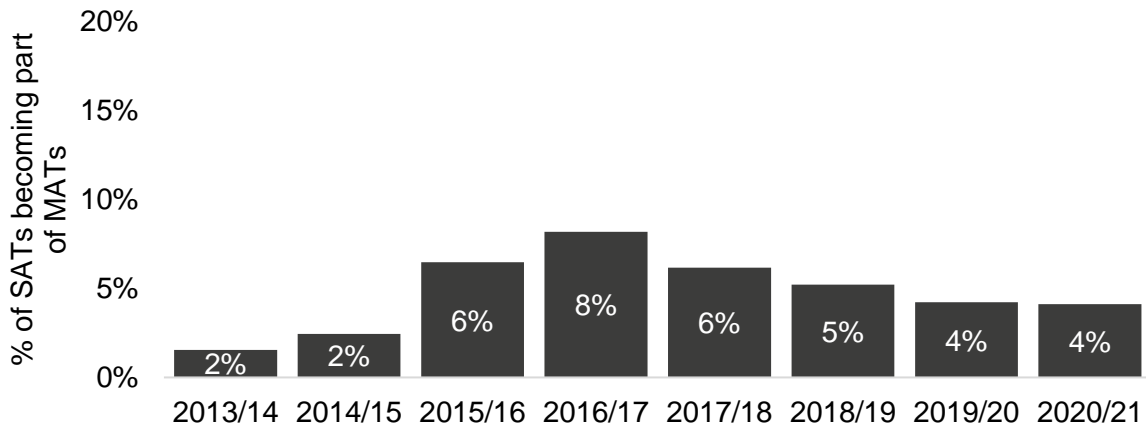


Source: NFER analysis of DfE data

A small share of SATs join MATs every year

Alongside converter and sponsored academies, another important set of movements into MATs has come from SATs. As shown by Figure 13, since 2015/16 there has consistently been a small share of SATs joining or expanding to form a MAT each year. The majority (nine in ten) of these SATs were converter academies which opted to become part of a MAT, as opposed to sponsored academies. Whilst overall there has been a substantial movement of SATs to MATs and a decline in the overall number of SATs, as shown in Figure 14, there are still over 1,000 SATs remaining (see Section 5 for further discussion). If the Government wants to achieve its ambitions for an all-MAT system, the rate at which SATs are joining MATs or expanding to form new MATs will need to increase considerably in the coming years.

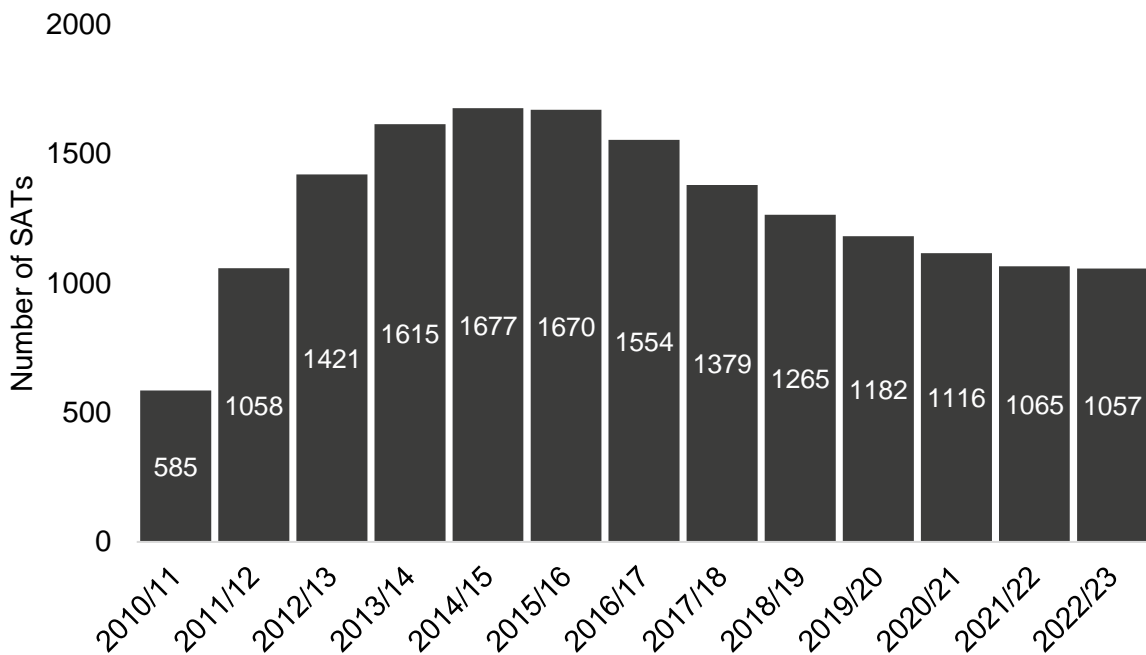
Figure 13 The share of SATs becoming part of MATs, 2010/11 – 2021/22



Source: NFER analysis of DfE data

Note: Refers to SATs becoming part of MATs in the following academic year

Figure 14 The number of SATs over time, 2010/11 – 2021/22

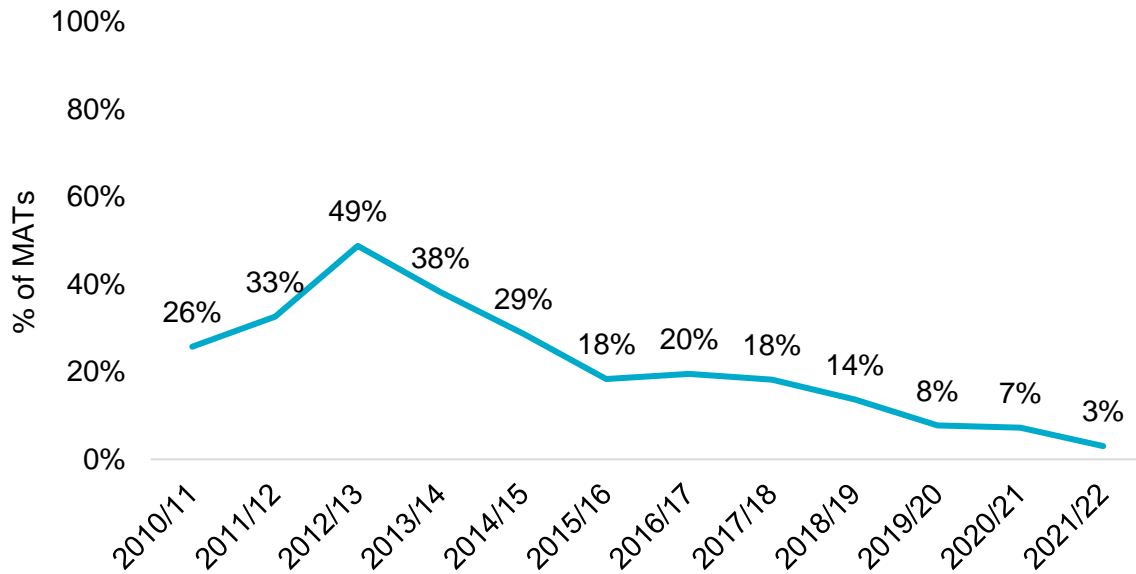


Source: NFER analysis of DfE data

The proportion of MATs sponsoring new academies each year has steadily decreased

Whilst sponsored academies are less common than converter academies, the majority of trusts contain at least one sponsored academy. Since 2012/13, six out of ten trusts with at least two schools have at least one sponsored academy. However, as Figure 15 shows, the proportion of MATs that have sponsored a new academy in any given year has been falling since 2012/13 and now only a very small proportion of trusts are sponsoring new academies. This reflects the declining number of academies being sponsored due to the dwindling population of underperforming schools left to academise among LA maintained schools.

Figure 15 The percentage of MATs that sponsor at least one new academy in each year, 2010/11 – 2021/22

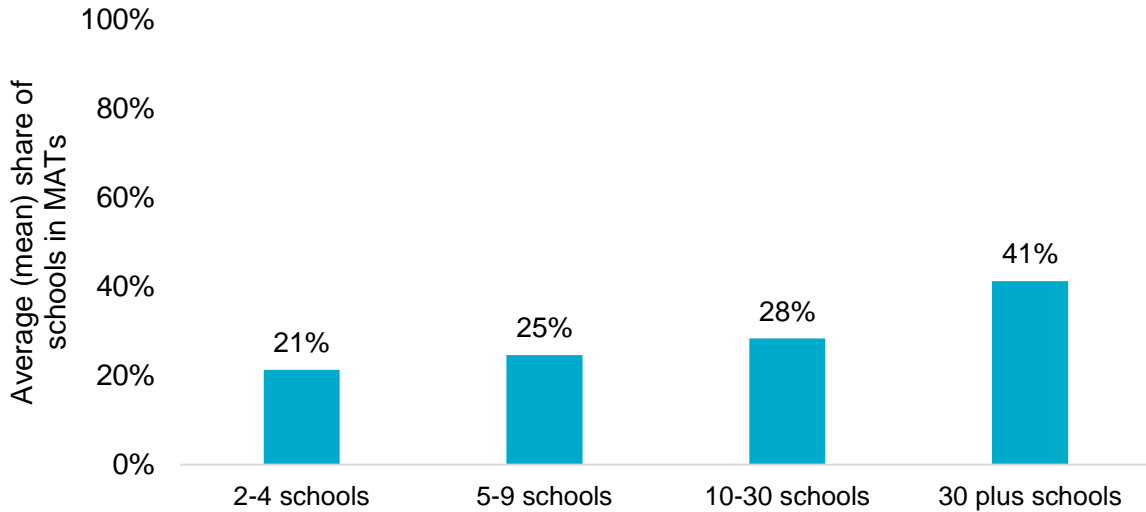


Source: NFER analysis of DfE data

Larger trusts, particularly those with more than 30 schools, typically contain a larger proportion of sponsored schools compared to smaller trusts

Figure 16 shows that, in 2022/23, larger trusts have a larger average proportion of sponsored academies than smaller trusts, particularly trusts of more than 30 schools. Overall, 37 per cent of sponsored academies sit within MATs with between two and nine schools, compared to 61 per cent of sponsored academies belonging to MATs with more than ten schools. The remaining two per cent belong to SATs. However, despite larger trusts containing the larger share of underperforming schools, small trusts still provide important capacity within the school system for supporting challenging schools.

Figure 16 The average percentage of schools in MATs that are sponsored academies by trust size, 2022/23



Source: NFER analysis of DfE data

Note: Trust size is based on all schools (including non-mainstream schools)

3.2 The types of MATs schools move into

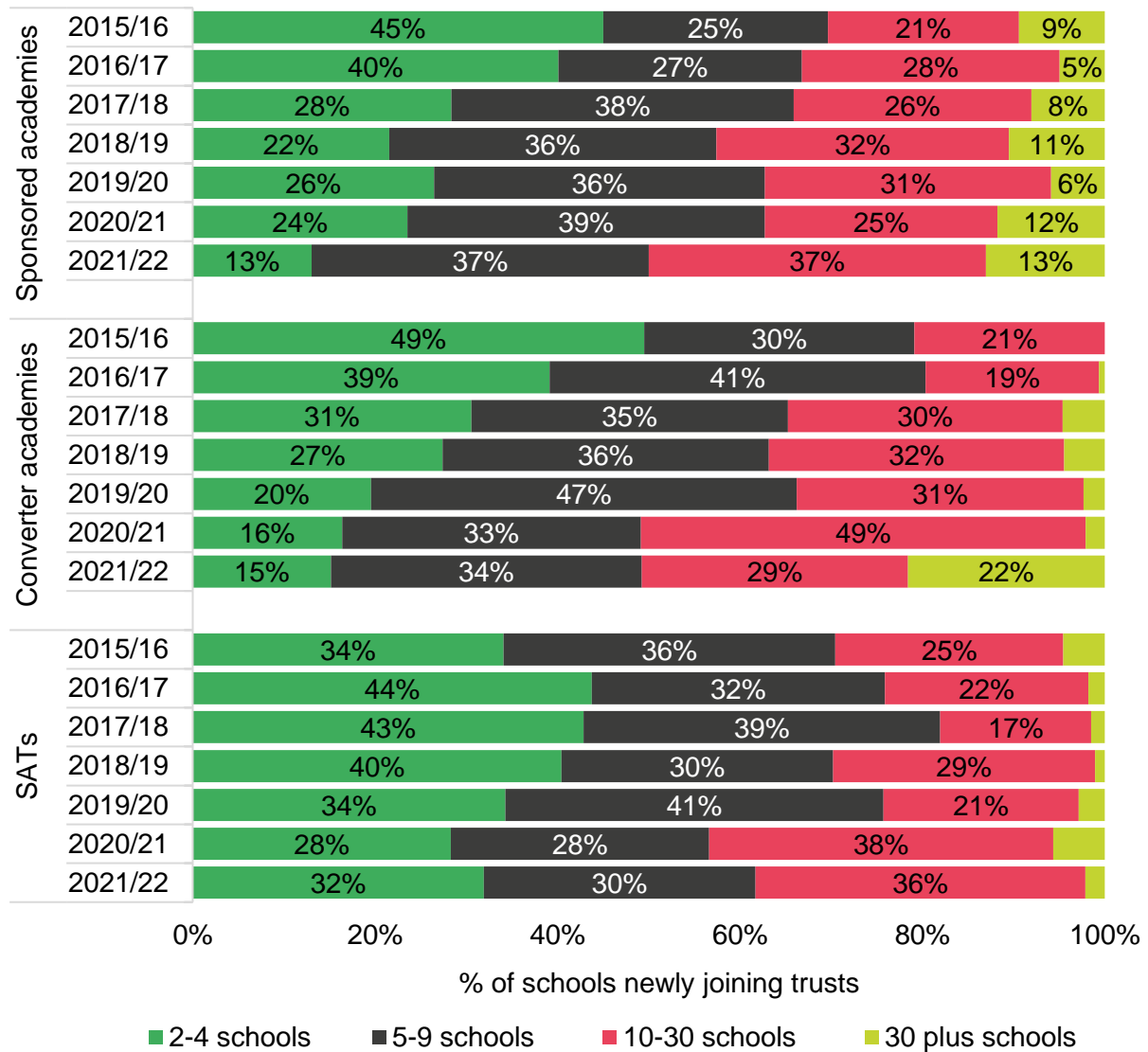
Academies are more likely to join larger trusts than they were in the past

Though a significant number of academies still join trusts with fewer than ten schools, there has been a noticeable shift in the pattern of the size of MAT which new academies are joining. As presented in Figure 17, converter academies, sponsored academies and SATs have all become more likely to join MATs with at least ten schools over time. This is likely to partly reflect the growth in the size of trusts over time which has meant that there are now more large trusts in the system, as outlined by Section 2.1. Today, around a fifth of MATs contain at least 10 schools and around half of all new converter and sponsored academies join trusts of this size. The shift towards schools joining larger trusts has been less marked for SATS joining MATs – less than four in ten SATs joined trusts with at least ten schools in 2021/22.

Since 2015/16, both sponsored and converter academies have become increasingly likely to join trusts with at least ten schools¹³. However, a considerable share of academies still join trusts with fewer than ten schools each year which highlights that smaller trusts still have a key role to play in building overall MAT capacity.

¹³ In 2021/22, a much larger share of converter academies joined trusts with more than 30 schools than sponsored schools. This was driven by a very small number of faith trusts bringing in a large number of schools. For further discussion of the growth of faith schools and trusts see Section 4.1.

Figure 17 The share of schools joining trusts by trust size and academy type, 2015/16 – 2021/22



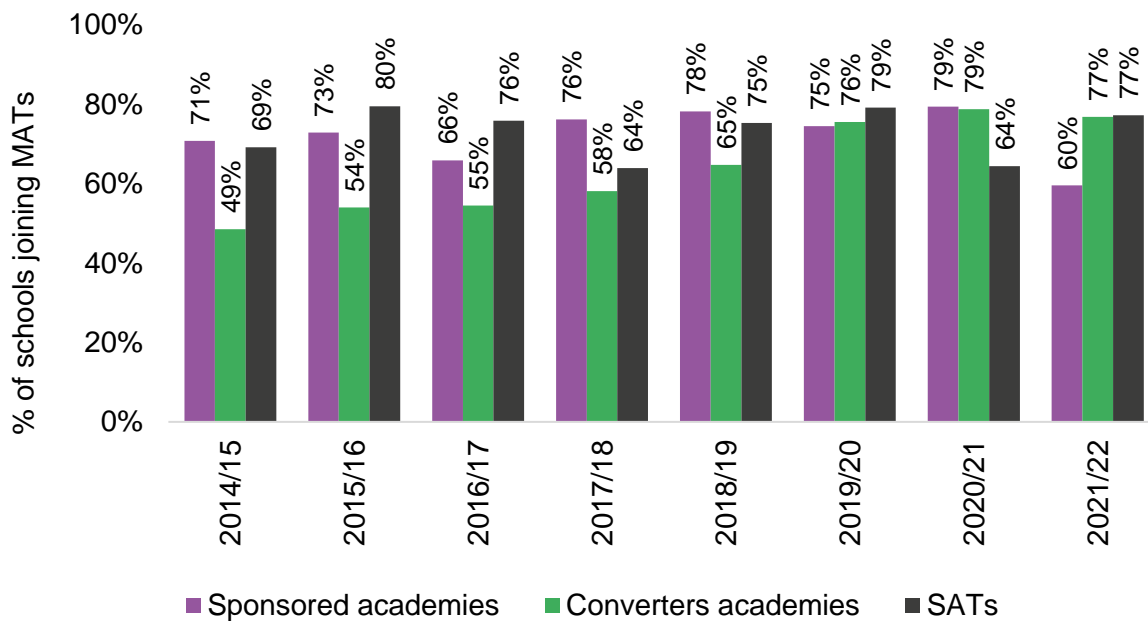
Source: NFER analysis of DfE data

Note: Trust size is based on all schools (including non-mainstream schools)

Schools are highly likely to join trusts with presence in their local authority

Figure 18 shows that schools are highly likely to join a MAT that already has a school in the same local authority. While the proportion of sponsored academies and SATs joining local MATs has remain relatively steady, increasing proportions of converter academies have elected to join a MAT represented in their local authority year-on-year. Additionally, around a fifth of schools join a trust represented among the five closest schools to them¹⁴. This highlights that building local capacity will be crucial to transitioning to an all-MAT system.

Figure 18 The share of schools joining a MAT with a school already in the same local authority by academy type, 2014/15 – 2021/22



Source: NFER analysis of DfE data

¹⁴ Since 2013/14, between 19 per cent and 27 per cent of schools have joined a trust represented among the five schools closest to them.

4 What patterns of movements into and between trusts might we see in the future?

This section explores the patterns of movements that the continued academisation of schools and growth of trusts is likely to bring about. It also discusses LAs' views on and interest in starting their own LA established MATs, a proposal announced in the Schools White Paper.

4.1 The academisation of key groups of schools

There are relatively few underperforming LA maintained schools who remain eligible for intervention

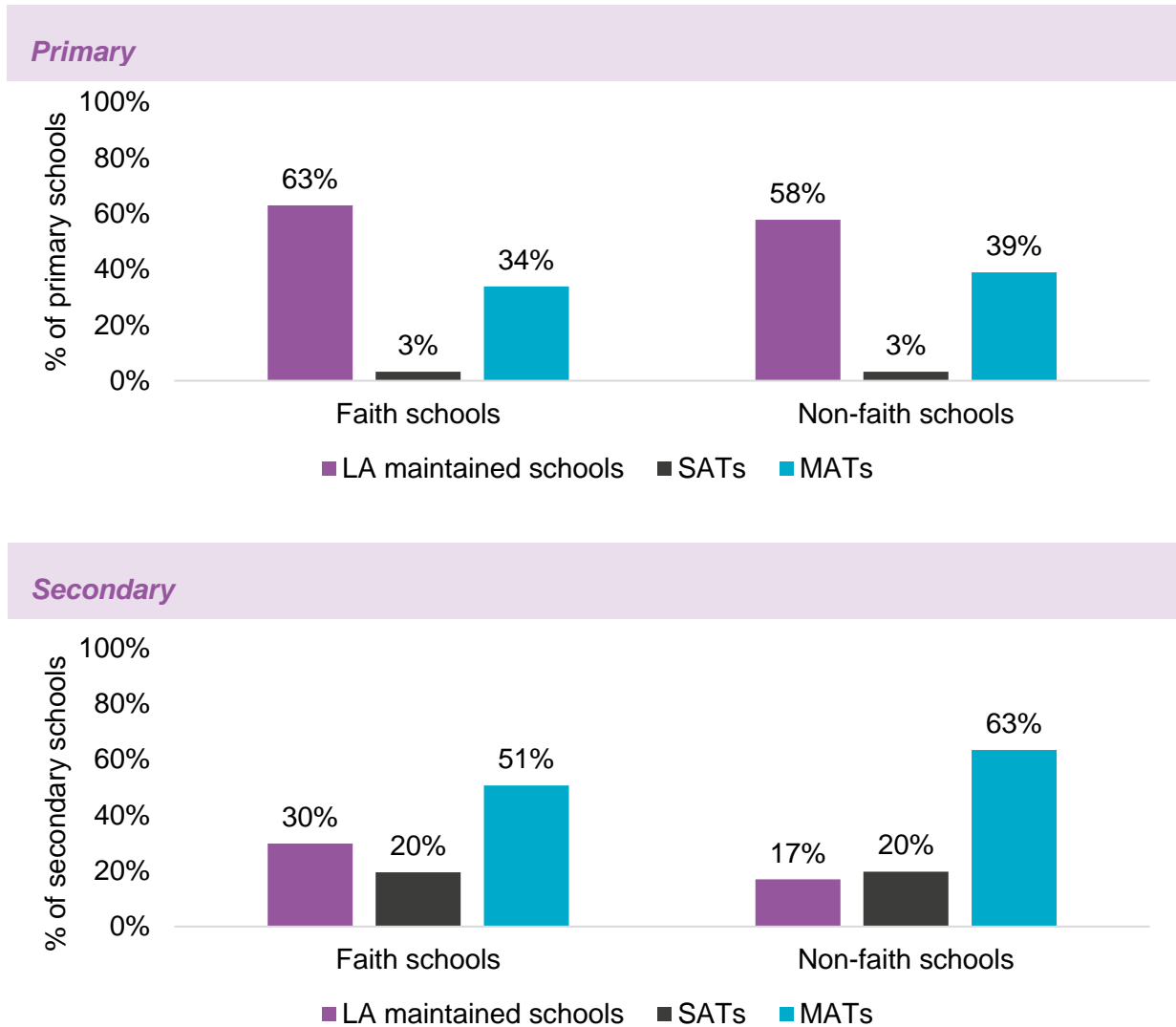
Schools with either an inadequate Ofsted rating, or two consecutive requires improvement ratings can be ordered to academise. As outlined in Section 2.3, most underperforming schools are now in MATs. There are currently fewer than 300 mainstream LA maintained schools who meet the criteria for intervention (compared to over 9,800 LA maintained schools rated good or outstanding), albeit more schools may become eligible over time. This highlights that the scale of movements into academies by under-performing LA maintained schools is likely to be limited going forward. In order to achieve full academisation, the focus will have to be on attracting high performing schools, particularly primaries, into trusts as converter academies.

Faith schools are a key block of schools yet to extensively academise

Almost a third of schools in England have a faith character (ethos or designation). To date, faith schools have been comparatively slow to academise – three-fifths of faith schools remain LA maintained compared to just under half of non-faith schools. This is in part because most faith schools are primary schools, which are less likely to have academised. However, as shown in Figure 19, secondary faith schools, and to a lesser extent primary faith schools, have been slower to academise than their non-faith counterparts.

A key reason why faith schools are less likely to be academised compared to other schools is because religious protections for academies are not as strong as for LA maintained schools. While religious protections for LA maintained schools are legislated in law, they are only governed by academies' funding agreements with the Government (Department for Education, 2022i). While additional legislation which strengthens the religious protections for faith schools had been outlined in the Schools Bill, the bill has now been dropped and the Government now intends to pass new legislation to remove barriers for faith schools wishing to join MATs (Belger, 2022b). While additional legislation could support more faith schools to academise, it is not clear how and when this will be legislated for.

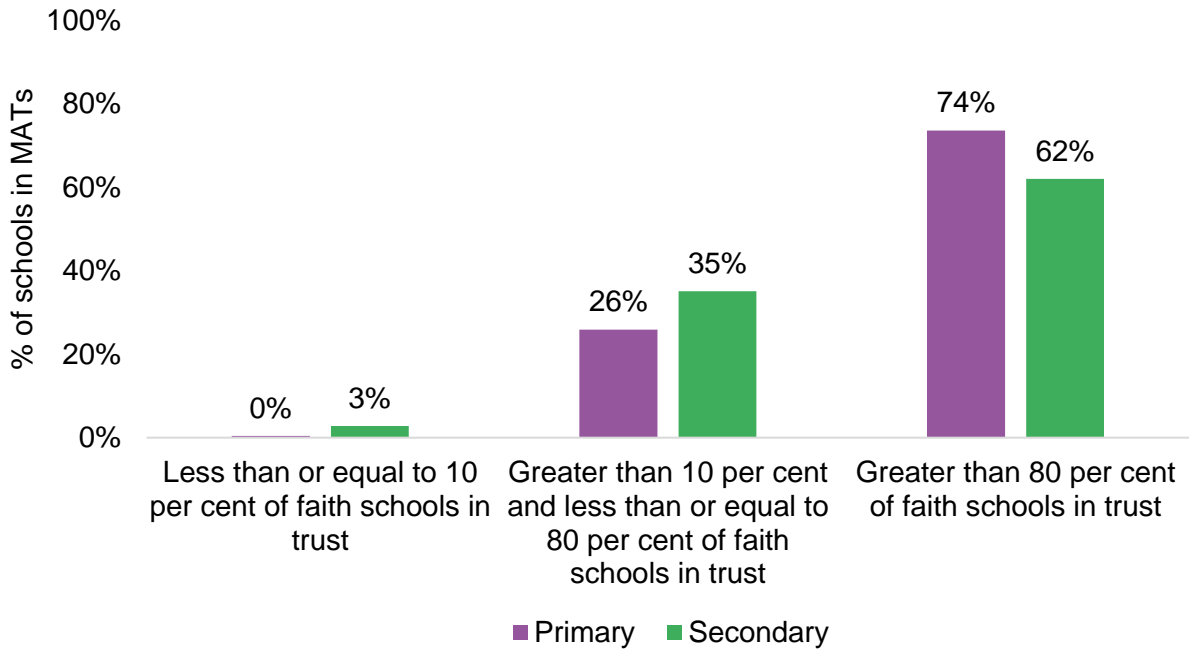
Figure 19 The proportion of schools academising by faith character/ethos, 2022/23



Source: NFER analysis of DfE data

Figure 20 shows that where faith schools do academise and join a MAT, they tend to join MATs which already contain a high proportion of faith schools, for example Diocesan Trusts. This is unsurprising given that faith schools must adhere to the policy of their relevant faith body and secure their agreement when academising and joining a MAT. For example, Catholic schools are required to join a catholic academy trust (Department for Education, 2021). If the Government can overcome the legislative barriers to faith school academisation, it is likely we will see a particular increase in the numbers of faith schools academising. The challenges which are currently preventing faith schools from academising are discussed further in Section 5.

Figure 20 The proportion of faith schools in MATs by phase, 2022/23



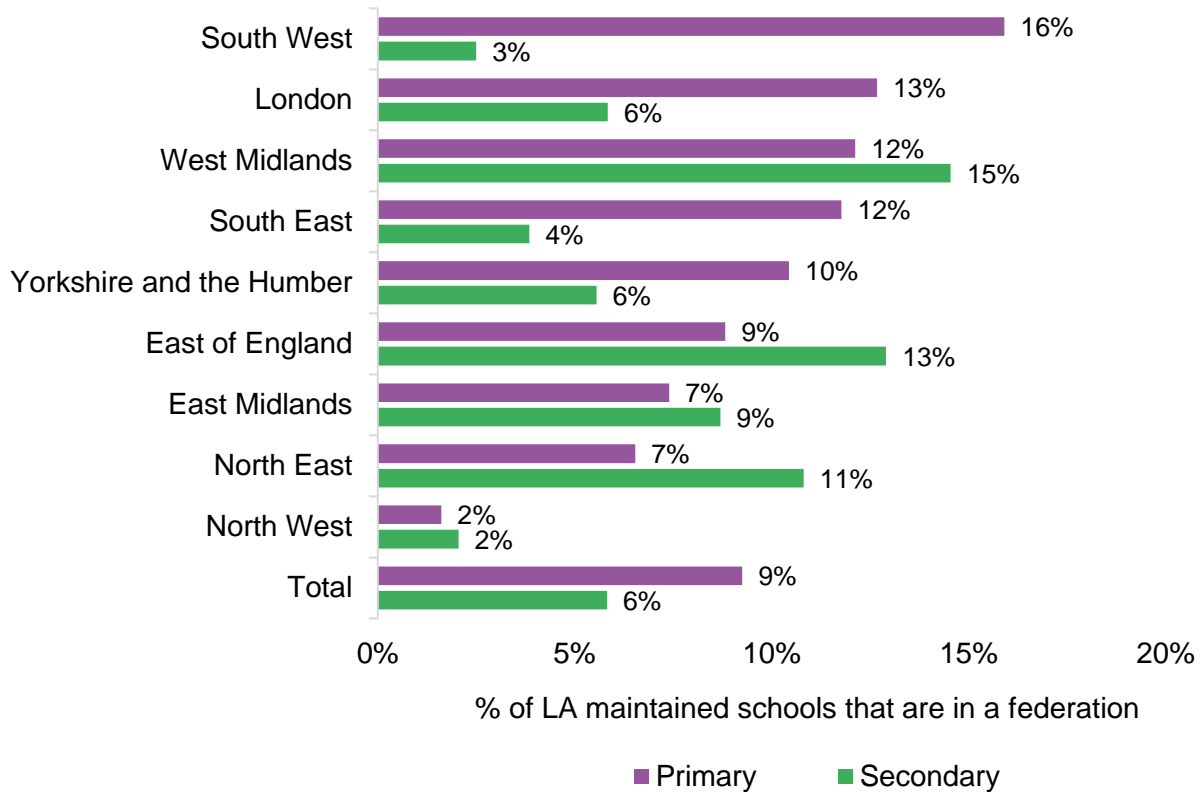
Source: NFER analysis of DfE data

A minority of LA maintained schools are supported by a federation

Around nine per cent of the remaining LA maintained mainstream schools are supported by a federation, a group of schools where two or more maintained schools share a single governing body. As shown in Figure 21, these schools are mainly primaries and tend to be concentrated in London, the South West and the South East, though the West Midlands and East of England have notable proportions of secondary federations.

In principle, as these are already groups of schools working together, they present an opportunity for rapid academisation. However, there are complexities. First, around a fifth of federations include a mix of faith and non-faith mainstream schools, with faith schools required to seek approval from their relevant faith body before academising as noted above. Second, the vast majority of federations are small so, once they academise, trust expansion and/or consolidation would be required to achieve a fully academised system where all schools are in a trust with at least ten schools. Finally, as with all LA maintained schools, there will generally be reasons why federations have not chosen to academise until now, so they will need to be convinced that academisation is in their best interests.

Figure 21 The proportion of schools in a federation by phase and region, 2022/23



Source: NFER analysis of DfE data

4.2 Trust mergers and re-brokerages

In 2021, the Government began to promote its vision for all schools to be in a ‘strong’ MAT with an expectation that trusts would grow by consolidating with other trusts, particularly among groups of small MATs (Department for Education, 2021). The Schools White Paper built on this vision and set out the target to have all schools in a ‘strong’ MAT containing ten or more schools by 2030.

There is no hard evidence about what the optimal size of a trust should be. However, the Government’s policy rationale is that trusts start to develop central capacity when they have more than ten schools (Department for Education, 2022k). They argue scale enables trusts to be more financially stable, maximise the impact of a well-supported workforce and drive school improvement. The Government argues that this has been strengthened by some trusts’ experiences during the pandemic and recognition of the resilience of larger trusts, particularly their financial resilience (Belger, 2022c). To achieve this target, a large number of trust mergers may be required due to the high volume of small trusts that are currently within the trust system as outlined in Section 2.1.

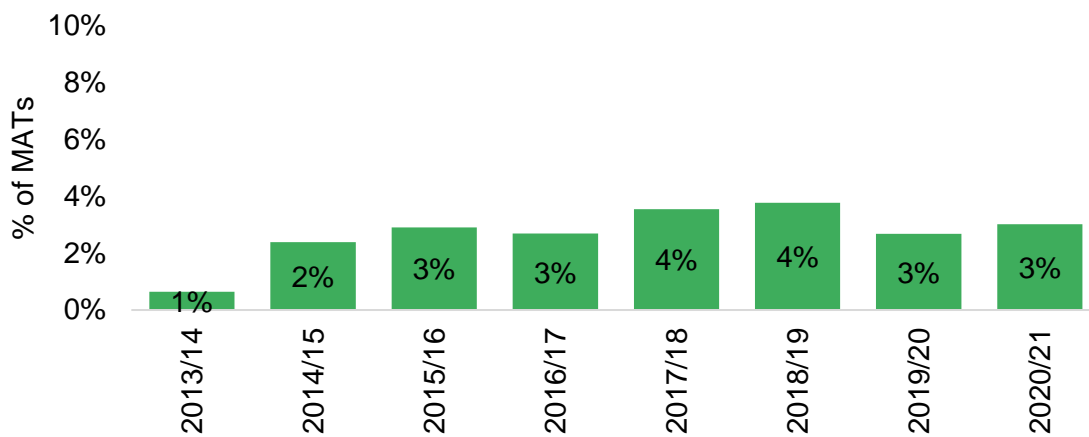
Historically, only small numbers of MATs have closed or merged together

Less than five per cent have closed or merged each year since 2013/14, as shown in Figure 22. A trust may close for a wide variety of reasons. It could be because of an intervention made by the regional director or simply because multiple MATs have opted to merge together on a voluntary basis where there is perceived to be sufficient benefit. This reflects the organic way in which the trust landscape has been allowed to evolve so far. While it is difficult to determine exactly why a trust has closed, we find evidence for intervention by regional directors or trust failure in about a

quarter of cases, as shown in Figure 23. While there are some very high-performing trusts among the remaining three-quarters merging voluntarily, our analysis finds that a substantial share (around a third) of the voluntary trust mergers are among relatively low performing schools in terms of Ofsted outcomes.

As the Government continues to promote trust growth and the benefit of economies of scale, they may consider facilitating an increase in the rate at which trusts merge as a way to grow smaller trusts to the desired size of ten or more schools. Although our analysis highlights that there is relatively little precedent for these mergers to date, trust mergers represent an important potential source of trust growth.

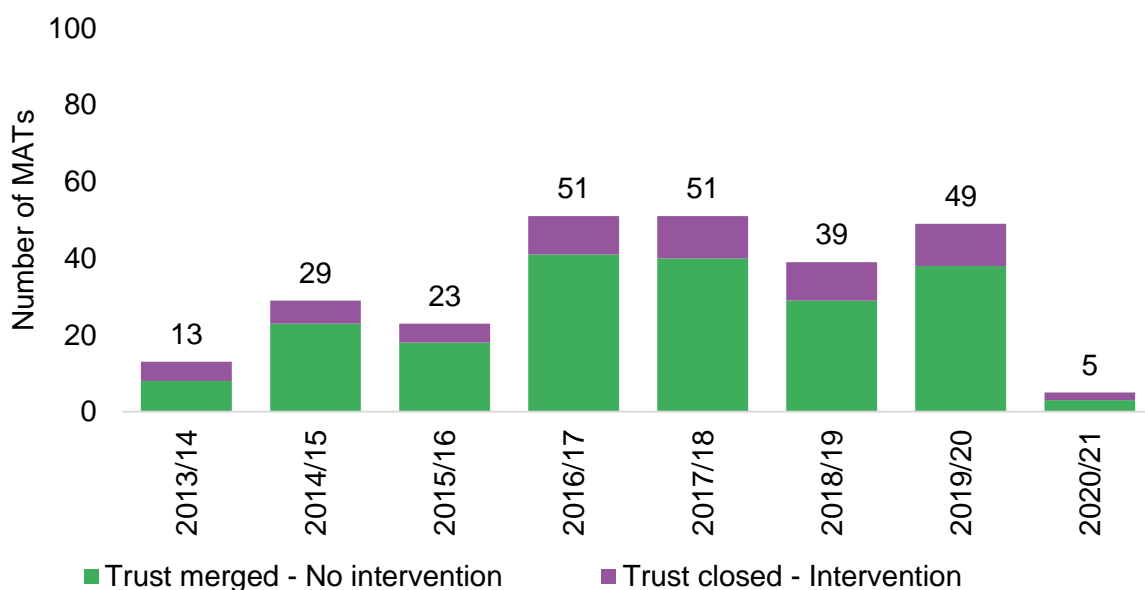
Figure 22 The percentage of MATs closing each year, 2013/14 – 2020/21



Source: NFER analysis of DfE data

Note: Analysis is restricted to MATs with at least two schools

Figure 23 The number of trusts closing and merging over time, 2013/14 – 2020/21



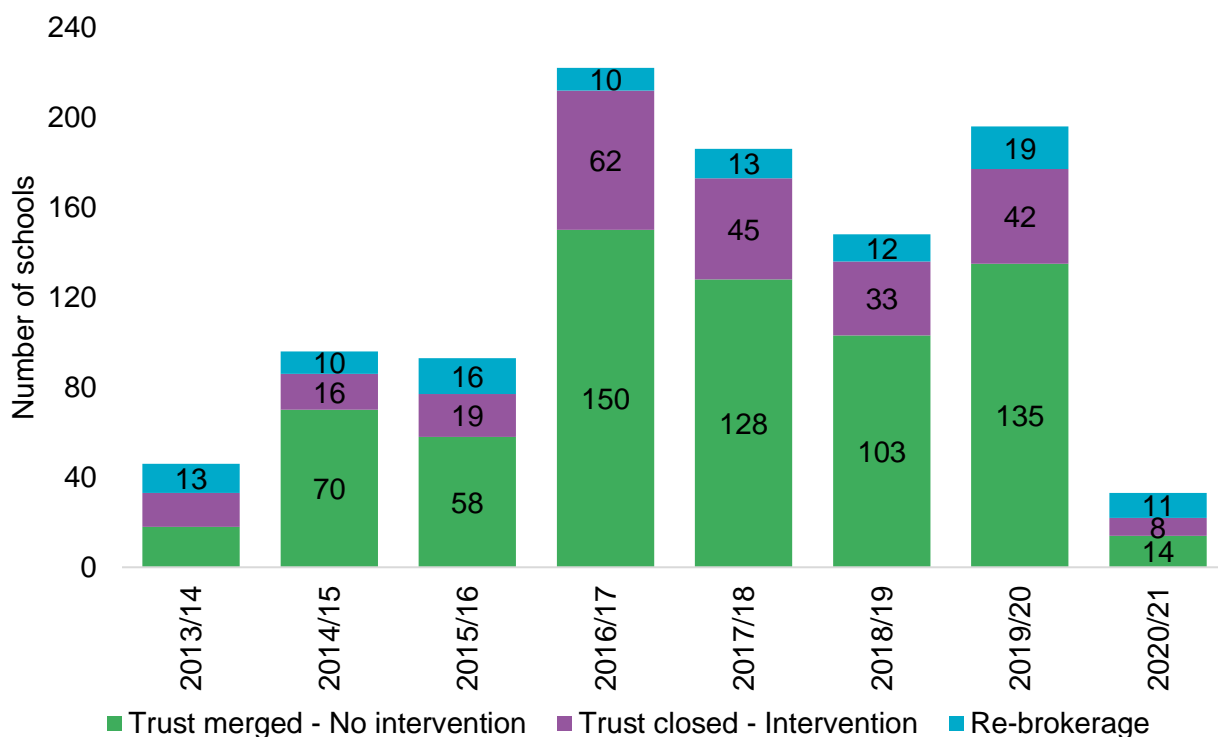
Source: NFER analysis of DfE data

Note: Interventions are identified (a) where data for the reason why the school left the trust is available and at least one school is recorded as having moved trust due to intervention, (b) where at least two or more schools closed when the trust closed or (c) where the schools in the trusts joined different trusts when the MAT closed. Analysis is restricted to MATs with at least two schools

Each year, a small number of schools are also re-brokered

As shown in Figure 24, re-brokerages are less common than schools changing trusts due to a merger. As might be expected, underperforming schools (as measured in terms of Ofsted ratings and attainment) are much more likely to be re-brokered¹⁵. Indeed, only a handful of high performing schools have been re-brokered. This reflects the fact that, despite some high-profile controversies, re-brokerages are initiated by regional directors because of performance concerns relating to either the school or the trust and that schools can only leave a MAT with the agreement of their regional director¹⁶ (Department for Education, 2017).

Figure 24 The number of schools involved in re-brokerages, trust closures and merging over time, 2013/14 – 2020/21



Source: NFER analysis of DfE data
Note: Analysis includes non-mainstream schools

There are regional differences in how quickly academies are re-brokered

Our analysis indicates that academies are, on average, re-brokered 3.4 years after joining their trust. When a sponsored academy joins a trust, there is a three-year grace period where the school

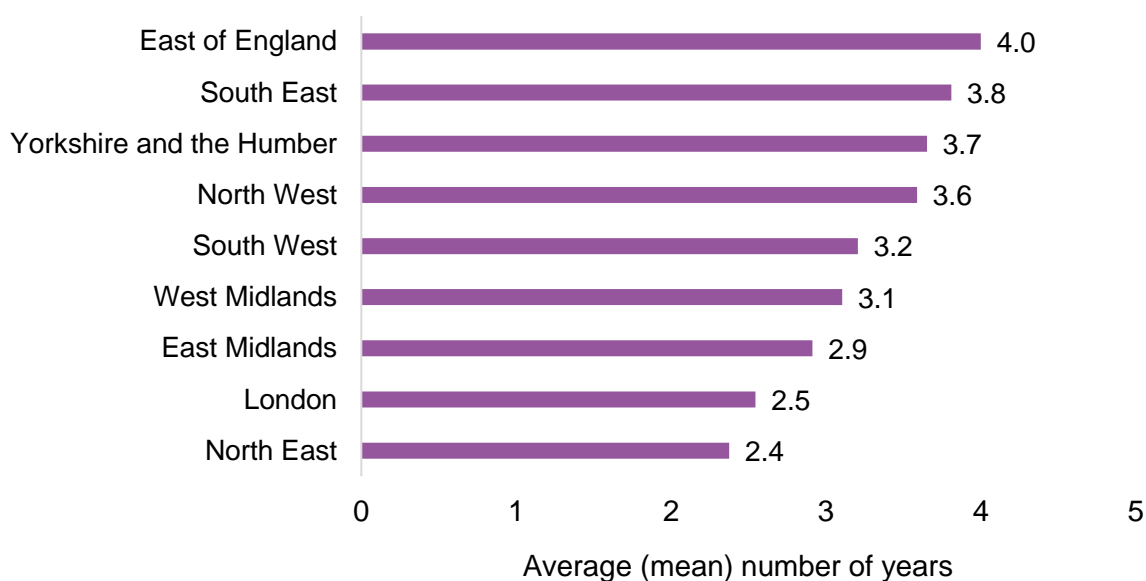
¹⁵ Our analysis found that around two-thirds (62 per cent) of re-brokered academies were rated as requires improvement or inadequate, while 28 per cent were rated good and 10 per cent were rated outstanding. For context, only 21 per cent of all academies have a requires improvement or inadequate rating. Similarly, almost three-fifths of re-brokered academies were in the lowest attaining quintile of school-level KS2 or KS4 outcomes.

¹⁶ Academies and trusts are able to voluntarily apply for the transfer of an academy to a different MAT.

is exempt from routine Ofsted inspections and the school’s performance data does not count towards the trust’s data. The fact that many academies are being re-brokered shortly after the end of this grace period suggests that it may be a key catalyst for regional directors to evaluate whether these underperforming schools are improving sufficiently in their current trust or whether re-brokerage might be in the school’s best interest.

While sample sizes are small, there is also considerable regional variation in how quickly re-brokerages take place. As shown in Figure 25, there is up to 18 months difference in the average length of time academies are given before being re-brokered between different regions. That said, caution is needed when interpreting these findings due to the small number of academies that have been re-brokered in each region¹⁷. There may be regional differences in the reasons why a school requires re-brokering and how regional directors are approaching the re-brokerage process. Regional directors need to strike a careful balance between giving trusts sufficient time to make improvements and ensuring that failing schools are not simply being moved from one trust to the next (Belger, 2022a).

Figure 25 The length of time academies are within a trust before being re-brokered by region, 2013/14 – 2020/21



Source: NFER analysis of DfE data

Note: Caution is needed when interpreting these findings due to the small number of academies that have been re-brokered in each region

4.3 Creation of LA established MATs

A key policy announced in the Schools White Paper was for LAs to be given the ability to establish their own MATs, with agreement from their regional directors, in areas where there is insufficient capacity among existing ‘strong’ trusts.

To avoid potential conflicts of interest, the intention is for LAs to be involved in the setup of an LA established MAT, but for that MAT to subsequently operate independently of the LA. The LA will

¹⁷ Across most regions, the number of academies who have been re-brokered ranges from 12-22 academies. However, in the North East, just four academies have been re-brokered.

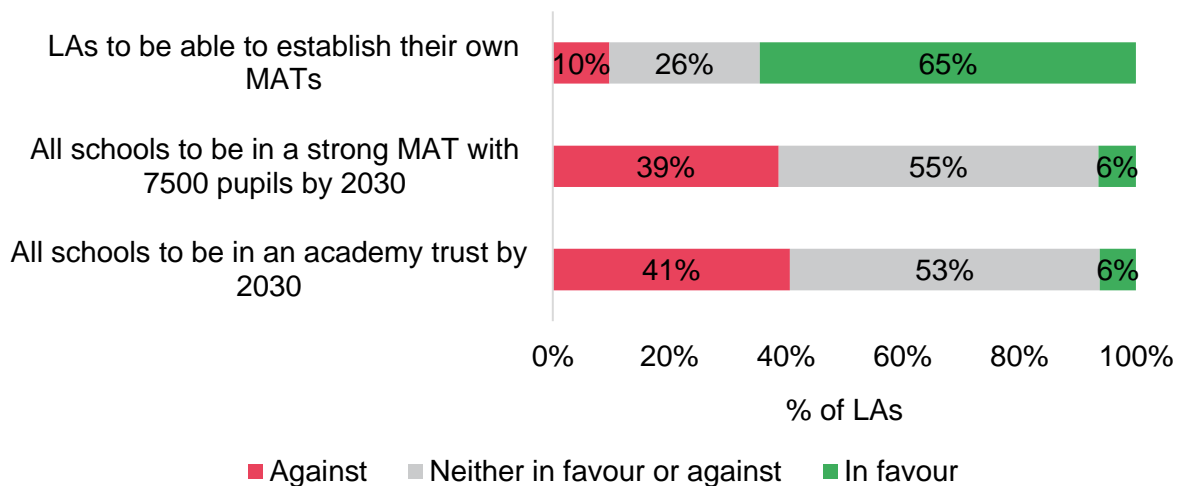
have responsibility for setting up the building blocks of a new academy trust, such as the proposed governance, leadership and finance arrangements. It will also appoint the members of the academy trust, who hold the trust board to account for the effective governance of the trust but have a minimal role in the actual running of it. It is also expected that the LA will work with the academy trustees to identify schools to join the academy trust, work with those schools to secure governing body approval to convert, and support academy trustees during the academy setup process (Department for Education, 2022d).

We administered a short survey to all directors of children’s services in England to explore LAs’ views on the Government’s White Paper academisation ambitions and the proposals to allow LAs to establish new MATs¹⁸. A sample of 33 responses was achieved, representing just over one in five LAs in England. The achieved sample had good representation from all regions in England and in the extent to which schools within responding LAs had academised.

Our survey found that LAs are generally in favour of being able to establish their own MATs, despite having concerns about the Government’s academisation plans

Around two-thirds of the LAs who responded to our survey were in favour of the proposal for LAs being able to establish their own MATs, as shown in Figure 26. This confirms that LA established MATs may be an important avenue through which the Government can promote academisation. By comparison, only six per cent were actively in favour of all schools being in a ‘strong’ MAT of at least ten schools or 7,500 pupils by 2030.

Figure 26 The proportion of LA respondents in favour or against the Schools White Paper proposals



Source: NFER survey of LAs. N = 32

Over two-thirds (65 per cent) of respondents reported that their LA was somewhat or very interested in establishing their own MAT. However, despite this high level of support and interest in LA established MATs, only 39 per cent of LA respondents felt their LA was likely to begin the process of establishing their own MAT within the next three years.

¹⁸ While the majority of responses came from directors or assistant directors of children’s services, there was a small minority of responses given by individual with a different job on behalf their LA. See the appendix for further details.

In May 2022, the DfE invited LAs to register an interest in a ‘test and learn’ pilot to help develop an LA established MAT in their local area (Department for Education, 2022c). Again, despite the high interest in LA established MATs, only one in five LAs applied to launch their own MAT via the pilot. It is expected that only around a third of these LAs will be accepted onto the pilot, indicating that it is likely to be some time before LA established MATs are being setup with any kind of scale.

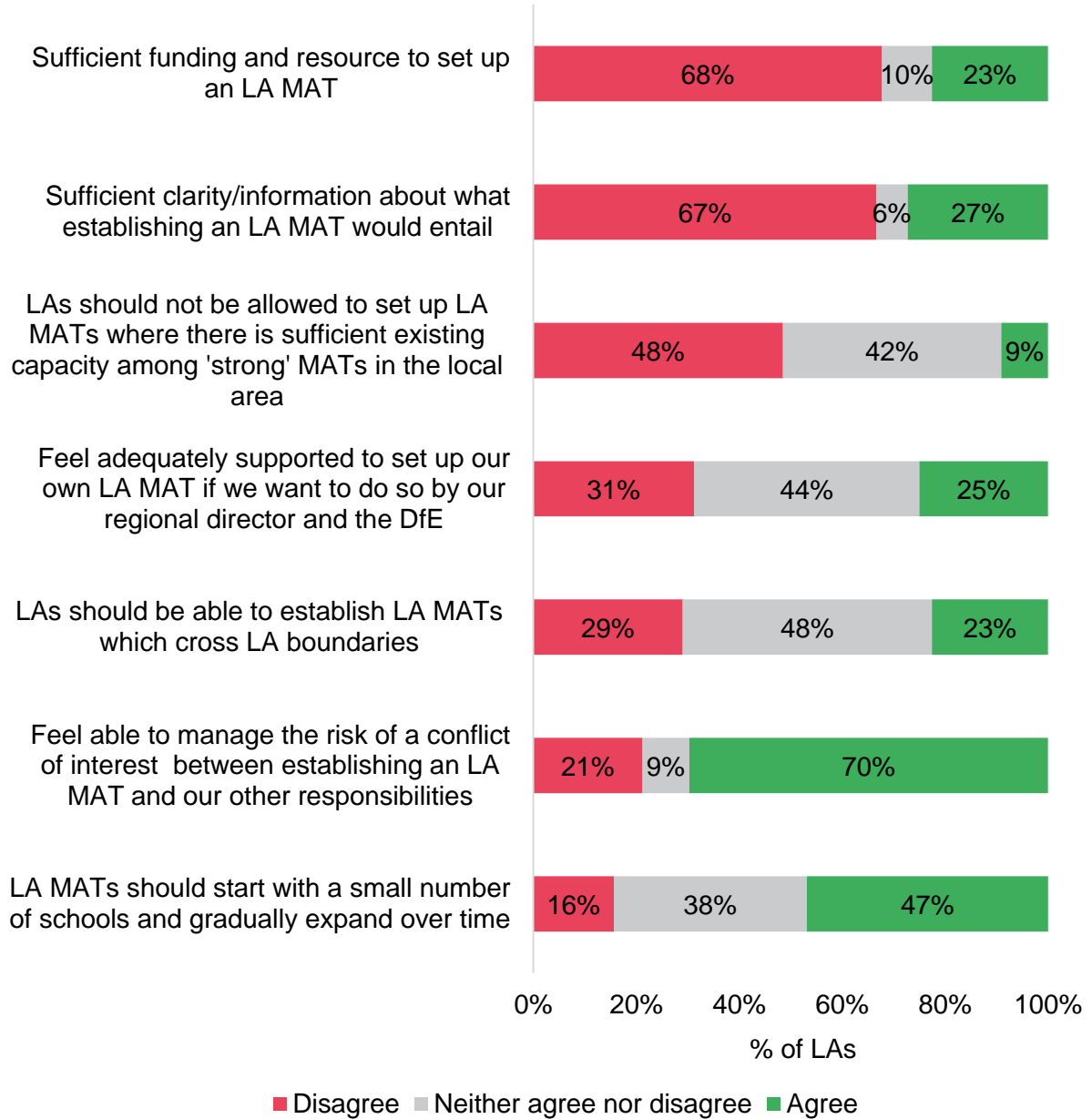
The disparity in the level of interest among LAs in establishing a MAT and the proportion who feel their LA is likely to begin this process may be due in part to concerns among LAs about their ability to fund the process and their understanding of what would be involved. This is shown in Figure 27. Almost 70 per cent of LA respondents did not feel they had sufficient funding and resource to set up an LA MAT. Similarly, over two-thirds of LA respondents did not feel they had sufficient clarity and information about what establishing an LA MAT would entail.

LAs also had wider concerns about transitioning to an all-MAT system. A number of LAs in our survey highlighted that some faith schools did not want to join the MAT that their relevant religious authority would consent for them to join and felt that this would be a significant challenge for academisation¹⁹. LAs also reported being concerned about what an increasingly MAT-led system would mean for their roles and responsibilities, and this is discussed further in Section 5.

The Government may wish to re-consider only allowing LA established MATs in areas with insufficient capacity among existing ‘strong’ trusts. LAs are not in favour of this aspect of the proposal (as shown in Figure 27) and over half of LAs noted that their remaining maintained schools and SATs are opposed to academisation and joining MATs. Allowing LAs to establish MATs irrespective of existing ‘strong’ trust capacity in the area may be a way which government can encourage more resistant schools to academise and/or join a MAT, particularly if their relationship with the LA is the main reason for their reluctance to academise.

¹⁹ Based on open responses to the questions “Aside from additional funding, what one thing could the Government provide to support LAs with their academisation plans?” and “In relation to education, what are the biggest challenges facing your local authority at the present time?”

Figure 27 The extent to which LAs agree or disagree with statements regarding the establishment of an LA MAT



Source: NFER survey of LAs. N = 33

5 Challenges

There is a myriad of existing and potential challenges which schools, trusts and LAs face in shifting to an all-MAT system. This section draws on our quantitative analysis and survey of LAs alongside the existing evidence base and policy debate, to outline the key considerations.

5.1 What are the key challenges in shifting to all-MAT system?

While there are many considerations in the shift to an all-MAT system, we outline and discuss nine of the most significant factors below.

Challenge #1: A long way to go

As outlined in Section 2.1, a large number of schools currently remain LA maintained or in SATs. Were the Government to pursue a target such as that laid out in the original 2022 Schools White Paper for an all-MAT system by 2030, 25 LA maintained mainstream schools and three SATs would need to join a MAT each week. Even if every school in a federation and diocese academised overnight, there would still be over 5,500 schools left to academise.

Academisation requires schools to form new MATs, or for there to be appropriate capacity in existing trusts to support expansion. However, not all MATs are high-performing, and even where they are, they may not be an appropriate fit for all the schools seeking to academise. Not only does locality play a key role in academisation decisions as outlined in Section 3.2, common culture, vision and ethos are also important factors for schools to consider when choosing to join a trust (Confederation of School Trusts and Stone King, 2022).

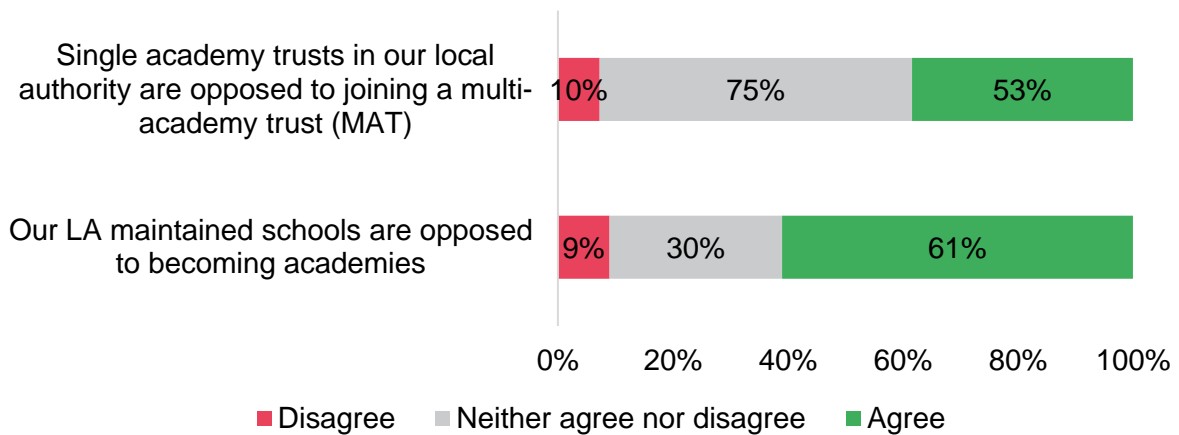
While the Government is supporting some trusts to increase their capacity and new MATs to form via the Trust Capacity Fund (Department for Education, 2022i), in recent years MAT growth has remained gradual. It is possible, in theory, for the smallest trusts to expand to ten schools by 2030, but this would require them to expand extremely rapidly. There is a risk that rapid trust growth of this nature creates issues for trust quality, as it did during the rapid expansion of the MATs programme in the early 2010s (Eyles, Machin and Silva, 2018). Some schools might rush to join a MAT, which is not necessarily an appropriate match, for fear of being forced to join another MAT in the future (National Governance Association, 2022). Given that a school cannot leave a MAT once it has joined, this risks creating substantial medium-term challenges within the system.

Challenge #2: Attracting schools to join a suitable MAT

Since the 2010 Academies Act, all LA maintained schools have had the option to academise. This begs the question of whether LA maintained schools and SATs who have not made the decision to join a MAT yet are likely to do so voluntarily going forward. Indeed, in 2021, a DfE commissioned survey found that most remaining LA maintained schools and SATs were not planning to academise (IFF Research, 2021).

The Schools White Paper has created a renewed interest in academisation (National Governance Association, 2022). As of September 2022, around half of the LAs in our survey had initiated conversations with at least some of their LA maintained schools about proactively planning to academise following the Schools White Paper ²⁰. However, our survey of LAs suggests that there is likely to be continued resistance from LA maintained schools and SATs to academising and joining MATs. Among the LAs who responded to our survey, 61 per cent indicated their remaining maintained schools were opposed to academising and 53 per cent felt that SATs in their LA were opposed to joining a MAT. This is shown in Figure 28. Given the Schools Bill has now been dropped in its current form (Belger, 2022b), the interest generated by the Schools White Paper may diminish.

Figure 28 The extent to which LAs agree or disagree that schools are opposed to academisation and joining trusts



Source: NFER survey of LAs. N = 33

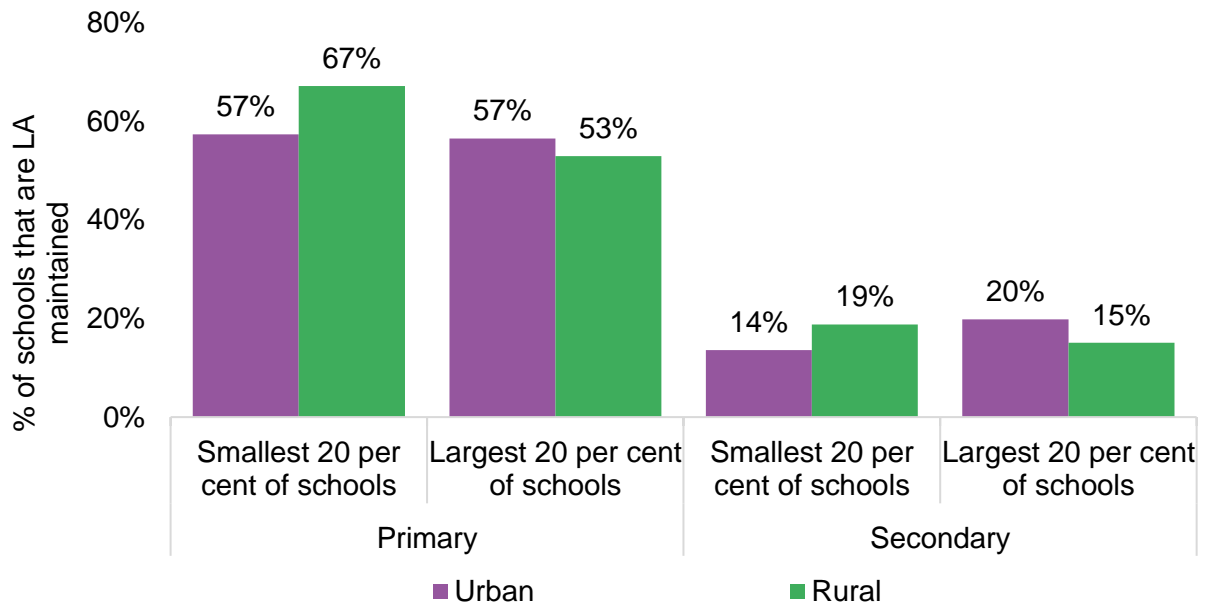
²⁰ Based on 33 responses to the statement that their LA has 'Encouraged some schools in the LA to proactively plan to academise or join a larger multi-academy trust (MAT)'. About 52 per cent reported that 'yes' they had done this. The remaining 48 per cent said 'no' they had not done this.

Challenge #3: Will some schools be left behind?

There are a number of reasons why some schools may not be attractive to a MAT or may particularly struggle to find a suitable MAT. For example, small rural primary schools are more likely to remain LA maintained compared to urban or larger schools, as shown by Figure 29 below. This may partly be because small, rural schools often face particularly acute financial challenges, and a unique set of circumstances which established MATs have less experience of managing (Department for Education, 2019).

This issue was reflected in our survey of LAs. Four-fifths of the surveyed LAs were concerned that some schools in their area risked being left behind because MATs would be reluctant to take them on. It is crucial that efforts and funding to build system capacity in MATs are focused on these schools, and that funding is targeted appropriately to ensure their long-term sustainability.

Figure 29 The proportion of schools who are LA maintained by school size and location, 2022/23



Source: NFER analysis of DfE data

Challenge #4: The optimal size of a MAT

The Government's original ambition was for all schools to be in a MAT with at least 10 schools, or 7,500 pupils by 2030. This was based on the argument that larger MATs are more likely to benefit from economies of scale and that a system with more scale will be easier to regulate (Department for Education, 2022k). As outlined in Section 2, the majority of trusts are small and operate regionally, particularly in the West Midlands, London and the North West. To achieve a system where all schools are in a MAT with at least ten schools it is likely that more MAT mergers will take place.

While the process of a school joining a MAT is time consuming and complex (IFF Research, 2021), MAT mergers are also likely to require substantial time and resource. For example, mergers may well require harmonisation in systems and processes (e.g. HR and finance), alongside involving restructuring or redundancies of senior staff (e.g., at least one MAT CEO will lose or need to change their job). There is also a more fundamental question about whether MAT mergers are desirable. While there may be a theoretical argument for larger trusts, there is a lack of evidence on the optimal size of a trust, in terms of both pupil outcomes and financial efficiency.

Challenge #5: Challenges facing specific schools

In Section 4.1, we outlined that faith schools are less likely to be academised compared to other types of schools and that additional legislation which strengthens the religious protections for faith schools would support more of these schools to academise. We also noted, however, that there are concerns among LAs that some faith schools do not want to join the MAT that their relevant religious authority would consent for them to join and that this would be a significant challenge for moving towards an all-MAT system. This highlights the importance of offering schools sufficient agency over their academisation decisions.

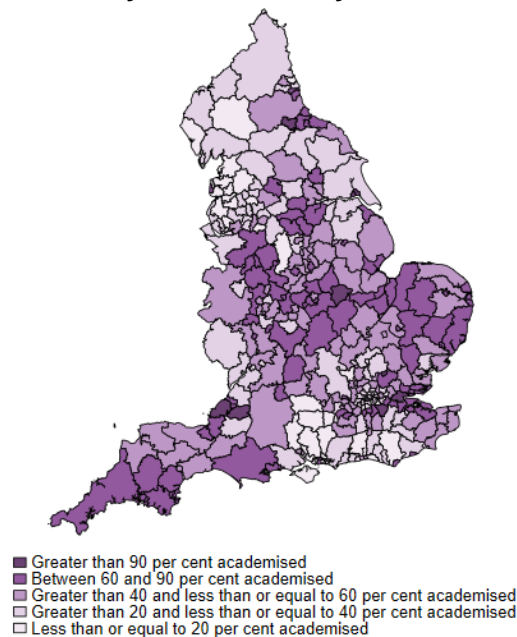
The English school system is complex and faith schools are just one group for whom academisation presents particular challenges. There are other examples of school structures which will need tailored and distinct approaches to academisation, federations being a further example as discussed in section 4.

Challenge #6: A complex regional picture

As outlined in Section 2.2, there are stark differences in the regional academisation rates of mainstream schools, and in the regional make-up and performance of trusts. This highlights the need for tailored local approaches. While strategic delivery plans for academisation are set to be developed for each local area, it is crucial that these are coherent across areas and feed into wider regional strategies. While regional directors have oversight of regional academisation decisions, their remits are vast. For example, there are over 1,000 mainstream schools yet to academise in the West Midlands, East of England, London, South East and North West regional director areas. This will make developing coherent local level strategies challenging.

There has also long been a question of whether some LAs are potentially nearing a tipping point of academisation in terms of financial viability and wider system efficiency. Nearly three in ten (29 per cent) have over 90 per cent of their mainstream schools academised, though there is a large amount of variation at the local level as shown by Figure 30. While this raises questions over the financial viability of these LAs as they may not benefit from the same economies of scale, only nine per cent of those surveyed agreed that it was no longer financially viable for their LA to retain the schools still under their control²¹. Most LAs do not want to force their remaining LA schools to academise. Only 13 per cent of surveyed LAs were in favour of government proposals for LAs to be given powers to compel their remaining LA schools to academise²².

Figure 30 Academisation rate by local authority district, 2022/23



Source: NFER analysis of DfE data

²¹ Based on 33 LA responses to the statement ‘Given the number of schools already academised in our area, it is no longer financially viable for our LA to retain our LA maintained schools’. Nine per cent of LAs agreed and 91 per cent of the LAs in our survey disagreed with the statement.

²² Based on 30 responses to the proposal ‘LAs to be given the power to compel LA maintained schools to academise via their regional director’. 13 per cent of LAs were in favour of the proposal, 30 per cent neither in favour or against and 57 per cent against.

Challenge #7: Funding, time and competing priorities

Funding may be both a barrier and a catalyst for academisation. On the one hand, academisation incurs substantial costs and is a time-consuming process (Department for Education, 2018; IFF Research, 2021). Schools who convert can apply for a grant of up to £25,000 to cover the costs of academisation (Department for Education, 2014), while trusts sponsoring schools, merging together and/or building capacity can also apply for additional funding (Department for Education, 2016b, 2022i). However, the current investment in capacity is not commensurate with a rapid academisation target²³. The costs of academisation are also borne by LAs, as well as schools and trusts (Department for Education, 2018). Several LAs in our survey highlighted that they would need additional funding to support increased numbers of schools academising each year.

Achieving the Government’s ambitions for an all-MAT system will inevitably divert resources from other areas. Many of the LAs we surveyed were concerned about the context in which the Government’s funding proposals may be implemented, and that academisation would divert attention and funding from other pressing policy priorities, such as the cost-of-living crisis, Covid-19 recovery and planning for demographic decline in primary pupils²⁴.

The vast majority of LAs surveyed highlighted major funding challenges in both schools and LAs. In particular, almost all LAs highlighted that they are facing significant challenges with meeting the costs of provision for pupils with SEND. While the Government has since announced an additional £2.3bn for schools in both 2023/24 and 2024/25, there is no additional funding for the current financial year, and it is not clear that this funding will be sufficient.

Conversely, funding challenges may also prove to be a catalyst for academisation. Schools facing particular financial challenges may academise to reduce costs and attract additional funding. Similarly, where the financial pressures on LAs are affecting their services, joining a MAT could seem a more favourable option for LA schools. While this may help the Government to meet its ambitions, it would be preferable for schools to choose to academise for positive reasons, rather than due to external pressures, as this will make for a stronger school system in future.

²³ The Government has committed up to £86 million to the Trust Capacity fund between 2022 and 2025 (Department for Education, 2022m). If all the committed funds are spent, this would represent an increase in spending on the programme (which has ranged from £13 million to £19 million between 2019/20 and 2022/23, (Department for Education, 2022n)). However, it does not represent as significant an investment compared to what has been spent historically. For example, the Government spent £38 million in 2016/17 on building trust capacity (Department for Education, 2018). This is despite the fact that, in order to achieve rapid academisation, greater investment in trust capacity is likely to be required.

²⁴ Based on open responses to the questions “Aside from additional funding, what one thing could the Government provide to support LAs with their academisation plans?” and “In relation to education, what are the biggest challenges facing your local authority at the present time?”

Challenge #8: Role of LAs

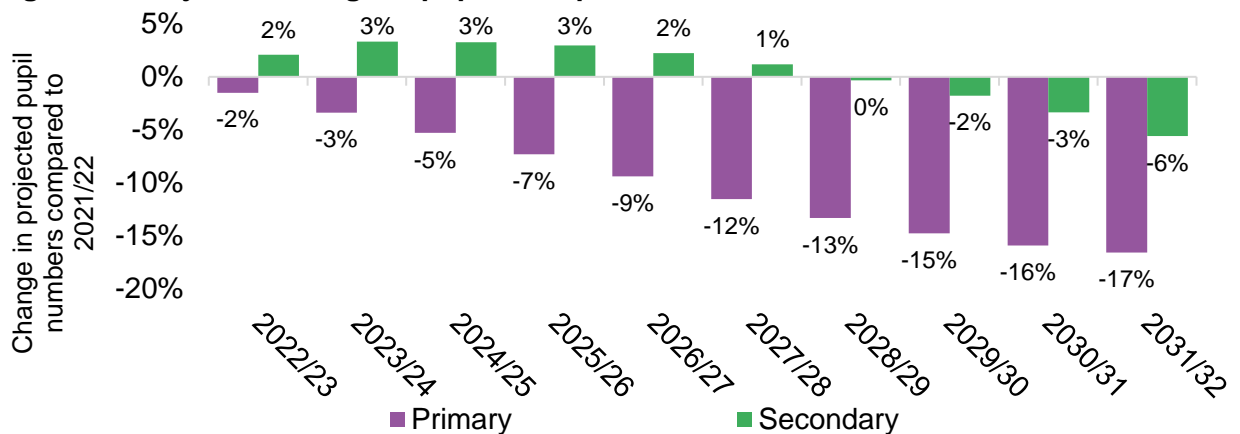
In the 2022 Schools White Paper, the Government set out a vision for every actor in the school system to have a clear role with LAs remaining at the heart of that system as champions for young people (Department for Education, 2022f). However, our survey of LAs highlighted that they wanted more clarity from the Government about their proposals for an all-MAT system²⁵.

The vast majority of LAs responding to our survey highlighted that meeting SEND needs was one of their most significant education related challenges. This was both in terms of funding, and the challenge of ensuring pupil needs could be met in a suitable setting. While the vast majority of surveyed LAs reported having good relationships with MATs in their local area²⁶, a number of LAs highlighted the need for greater inclusivity and cooperation within the school system. LAs currently have the responsibility for placing every pupil within their local area, but they do not have the power to force academies to take on pupils (although they can ask the Secretary of State to intervene). This creates a mismatch between their power and responsibilities and means that pupils are not necessarily being placed in the most appropriate setting.

LAs also had concerns about the impact of academisation on their existing school improvement networks. Several LAs outlined that academisation risked compromising the strong existing networks for supporting school improvement within their local areas.

Finally, LAs had particular concerns about the imminent demographic decline in primary pupils. As shown in Figure 31, the number of pupils in state-funded primaries is set to fall by almost a fifth by 2032. While LAs have responsibility for planning pupil places in their local areas, they currently have limited formal powers for closing schools or reducing pupil rolls in academies. There is a risk that all schools becoming part of MATs will exacerbate the challenges created by the mismatch between LA powers and their responsibilities.

Figure 31 Projected change in pupils compared to 2021/22, 2022/23 to 2031/32



Source: NFER analysis of DfE data

²⁵ Based on open responses to the questions “Aside from additional funding, what one thing could the Government provide to support LAs with their academisation plans?” and “In relation to education, what are the biggest challenges facing your local authority at the present time?”

²⁶ Only 13 per cent of the LAs in our survey disagreed with the statement ‘We work collaboratively with existing MATs within our local area’. This compares to 69 per cent who agreed and 19 per cent who neither agreed or disagreed. Based on 32 responses.

Challenge #9: A regulatory framework for trusts

Following the March 2022 Schools White Paper, the Government launched a regulatory review into school trusts to consider how trust strength is defined, measured and judged; how new trusts are commissioned and incentives for system improvement; and how and when a regulator would intervene (Department for Education, 2022a). While the review – which was set to conclude by December 2022 – has not yet reported, these will be crucial questions to consider in moving to an all-MAT system. It is key that this review is prioritised going forward in order to support the development of an effective national regulatory framework.

A core challenge for establishing a regulatory framework will be ensuring that it can be implemented in accordance with trusts’ funding agreements, the terms of which are dependent on when a trust was established. The Schools Bill (as outlined in Section 4) intended to address this but, as the bill now been dropped, devising and achieving agreement on revised legislation is unlikely to be straightforward.

The more fundamental challenge is how ‘strong’ trusts should be identified and this is the focus of the ongoing regulatory review. This is crucial for both driving capacity to support an all-MAT system and ensuring that lower performance within trusts is improved going forward. While the DfE has a diagnostic framework to identify MAT capacity (Department for Education, 2022e), it is not clear how this will be translated to a framework which can adequately assess trust quality. One thing which is clear for any assessment of trust quality is that over-reliance on performance measures could potentially be misleading. As outlined in Section 2.3, this is because trust performance measures will be affected by trust composition (such as trust size and the proportion of sponsored academies within the trust) and the timing of their expansion(s).

5.2 Discussion

This section has outlined a number of challenges to achieving an all-MAT system. It is clear that any remaining ambition to rapidly transition to an all-MAT system will not be achieved unless government efforts in support of it are significantly scaled up. Our analysis also highlights that rapid academisation and trust growth risks creating issues and diverting resource/focus from the crucial issues affecting schools and LAs. While there will never be a perfect time for system change, there is a case for prioritising key issues, such as establishing an appropriate regulatory framework, defining what makes a ‘strong’ trust, and supporting inclusion and collaboration across the system, ahead of moving schools into trusts.

It is also important to recognise that many of the challenges outlined above are important issues that the Government needs to work through even if the current status-quo is maintained. For example, it is crucial that LAs have powers which match their responsibilities, and that an appropriate regulatory framework is established.

6 Conclusions

A substantial number of schools are yet to academise or remain in small trusts. Given the current political context, the slowdown in academisation in recent years and the scale of academisation and trust growth that would be required, it is likely to take a significant period for the Government to achieve an all-MAT system, certainly beyond 2030. Rapid trust growth – in conjunction with the absence of an appropriate regulatory framework – also risks creating issues for quality and increases the possibility that schools join an inappropriate MAT.

In addition, there has been uneven progress in academisation across different regions, and there are considerable regional differences in how the MAT landscape has evolved. At the local level, this variation is intensified with some LAs having very few LA maintained schools remaining.

Most underperforming schools²⁷ have now joined MATs but there remain a significant number of lower-performing trusts within the system. Regardless of whether or not further academisation is pursued, greater focus on policies beyond the conversion of underperforming schools into sponsored academies are needed to support school improvement.

Allowing LAs to establish MATs may be an important avenue through which the Government can achieve further academisation, particularly in areas with few remaining LA maintained schools. However, the Government needs to ensure LAs are provided with the necessary resources and sufficient clarity to support the process. Despite LA interest in establishing their own MATs, LAs have concerns about the Government's academisation policy, particular regarding the impact this could have on their future role and on ensuring collaboration and preserving existing school improvement networks within their local areas.

This report highlights that the ambition to rapidly transition to an all-MAT system, where all schools are in a 'strong' trust of at least ten schools, would require schools to join MATs and trusts to merge at an unprecedented scale. Given the many factors to consider, the Government should prioritise a slower transition that allows more time to build MAT capacity and to ensure the transition is supported by the commensurate resources and policy solutions to facilitate all schools joining a 'strong' MAT. It is also important to recognise that there are important issues that the Government will need to work through even if the current status-quo is maintained. This includes completing the ongoing regulatory review and establishing an appropriate regulatory framework, defining and supporting the development of 'strong' trusts and ensuring that LAs have powers which match their responsibilities.

²⁷ Where performance is measured on the basis of Ofsted outcomes and attainment data.

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Appendix

Quantitative Analysis

Our quantitative analysis draws on a range of administrative data sources. The DfE's Get Information About Schools (GIAS) data was used to identify school-level characteristics such as type of school, religious character, and geographical information (Department for Education, 2022b). Historical and present-day information on Ofsted inspections was drawn from published management information data (Department for Education, 2022g). Key stage 2 (KS2) and key stage 4 (KS4) attainment data was taken from the DfE's School Performance data tables (Department for Education, 2022h). To identify the LA maintained schools that subsequently academised, GIAS data on historical school linkages was used.

Historical data on school trust membership was taken from the 'SAT and MAT membership history' data available on GIAS, and the DfE's 'Academy transfers and funding' data. This data required cleaning to remove inconsistencies and duplicate school-trust records. Whilst the cleaning process was comprehensive, due to the irregularity of the data, there may be a small number of discrepancies with other published sources. Years are presented based on school academic year, from September to August. This may be another reason for discrepancies compared to other data sources that define years based on the financial year for Academies, from August to July.

Most of the analysis in this report is based on mainstream schools including primary, secondary and all-through LA maintained schools and academies. Unless otherwise specified, special schools, alternative provision, nurseries or post-16 schools are not included.

Academies joining trusts were identified as both LA maintained schools academising to become converter or sponsored academies and brand-new academies opening and becoming part of trusts. It is important to note that our analysis excludes free schools. From 2017/18 onwards, the majority of new academies were free schools and hence from this period the majority of brand-new academies are excluded from the analysis.

An academy was identified to have been re-brokered where an academy moved from one trust to another trust, but the majority of the other schools remained in the trust. Where the majority of the other schools also move from the trust, this was identified as a change in the status of the trust (the trust closing or merging with another trust).

As mentioned in the report, a small number of MATs have only one school. For convenience, there are a number of places in the report where we include these MATs together with SATs²⁸. These are flagged in footnotes in the text.

Where Ofsted ratings are analysed, they refer to a school's most recent rating. For the purposes of our analysis, converter academies retain their Ofsted inspection history when they convert. For sponsored academies, the Ofsted ratings received when the school was an LA maintained school are excluded.

²⁸ In 2022/23 there were 174 single school MATs

Survey of Local Authorities

A short online survey was administered to the directors of children's services in all local authorities (LAs) in England. It explored LA views on full academisation and proposals to allow LAs to establish new MATs alongside the wider challenges LA are currently facing in relation to education. Contact details for directors of children's services across LAs in England was sourced from the Association of Directors in Children's Services (ACDS)²⁹. The survey was live for three weeks from late September until mid-October 2022. Directors of children's services were asked to respond on behalf of their LAs and so, due to the small sample size, there may be a selection bias as to who responded to the survey.

A total of 42 responses were obtained. However, some LAs were represented more than once among these responses due to multiple individuals from the same LA answering the survey. Where this occurred, the response from the most senior person in the LA was retained. The final sample contained 33 unique LA responses, representing one in five local authorities in England. The achieved sample had good levels of representation across all regions in England and across LAs which had academised to differing extents. The responses given by LAs primarily came from directors of children's services or equivalent. The composition of the achieved sample by region, extent of academisation and respondent job role are presented in Tables 1 to 3.

Closed questions were analysed descriptively, while qualitative analysis was undertaken on open response questions.

Table 1 The proportion of LA responses by region

Region	Frequency in Sample (N)	Percentage in Sample (%)	Frequency of LAs in England (N)	Percentage of LAs in England (%)
East Midlands	2	6	10	7
East Of England	2	6	11	7
London	8	24	33	22
North East	1	3	12	8
North West	4	12	23	15
South East	5	15	19	13
South West	2	6	14	9
West Midlands	3	9	14	9
Yorkshire And The Humber	6	18	15	10
Total	33	100	151	100

Source: NFER survey of LAs

Note: The Isles of Scilly have not been included in this analysis

²⁹ [Full list of directors of children's services across local councils in England.](#)

Table 2 The proportion of LA responses by extent of academisation

Extent of academisation within the LA	Frequency in Sample (N)	Percentage in Sample (%)	Frequency of LAs in England (N)	Percentage of LAs in England (%)
Less than 60 per cent of schools academised	17	52	86	57
Between 60 and 80 Per cent of schools academised	11	33	52	34
More than 80 per cent of schools academised	5	15	13	9
Total	33	100	151	100

Source: NFER survey of LAs

Note: The Isles of Scilly have not been included in this analysis

Table 3 The proportion of LA responses by Job Role

Respondent Job Role	Frequency (N)	Percentage (%)
Director of Children's Services	15	45
Head of Education Services/Standards	5	15
Assistant Director of Children's Services	11	33
Managers with responsibility for education provision	2	6
Total	33	100

Source: NFER survey of LAs

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