

## Childcare providers and inspections

This release contains:

- The number of Ofsted registered childcare providers and places, and their most recent inspection outcomes as at 31 March 2017.
- The number of providers that have registered with Ofsted (joiners) and the number of providers that have left (leavers) between 31 December 2016 and 31 March 2017.

### The number of childminders who are registered with Ofsted has continued to decrease

There were 43,500 childminders registered with Ofsted as at 31 March 2017. This was down 500 since 31 December 2016. Overall, childminder numbers have fallen by 24% since 31 August 2012.

The number of non-domestic providers increased by 100 in the first three months of 2017 to 27,000. However, this is down 3% since 31 August 2012.

### The number of childcare places offered by providers on the Early Years Register has remained broadly stable

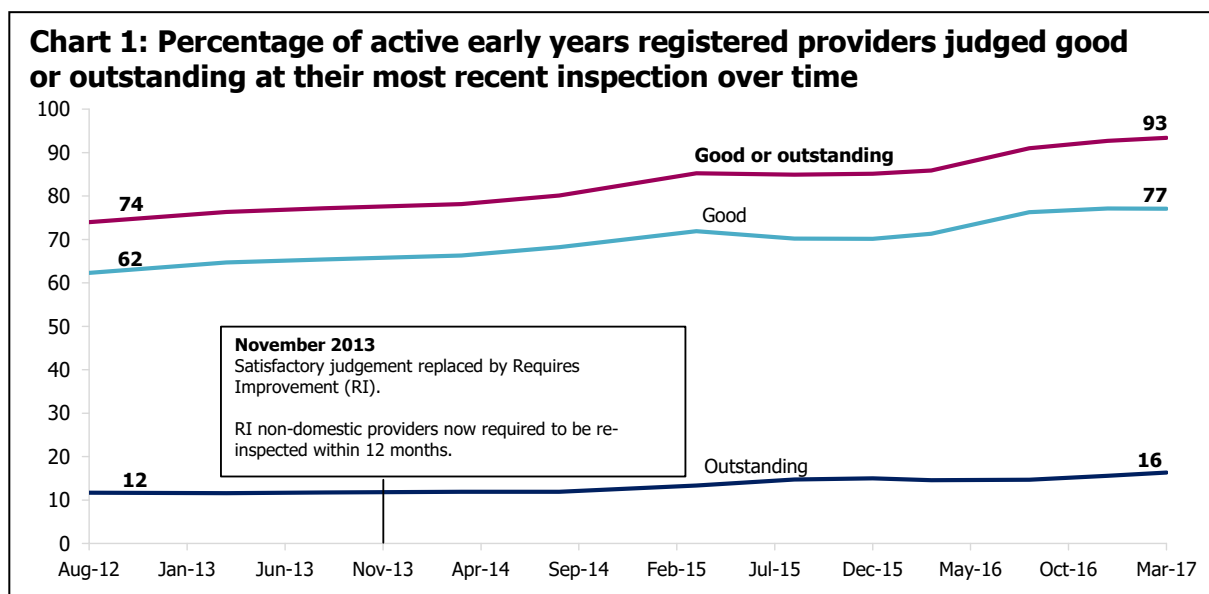
Despite decreasing numbers of providers, the number of childcare places offered by providers on the Early Years Register has remained broadly stable since August 2012.

It is estimated that there are almost 1.3 million places in early years registered provision, with 80% of these places provided by childcare on non-domestic premises and the majority of the remaining places provided by childminders.

### More than nine in 10 providers on the EYR were judged to be good or outstanding

As at 31 March 2017, the proportion of childcare providers on the Early Years Register judged to be good or outstanding was 93% (Chart 1). This is the same percentage as was seen at 31 December 2016, but is up from 74% as at 31 August 2012.

**Chart 1: Percentage of active early years registered providers judged good or outstanding at their most recent inspection over time**



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### **Acknowledgements**

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## Introduction

The early years and childcare sector is primarily made up of private nurseries, pre-schools and childminders. These are categorised into four provider types:

- **Childcare on non-domestic premises:** nurseries, pre-schools, holiday clubs and other private provision on business premises, usually registered on the Early Years Register (EYR) because they look after children aged 0–5.
- **Childminders:** people who are paid to look after one or more children they are not related to in someone’s home. The majority are registered on the EYR because they look after children aged 0–5, but those who look after 5–7 year olds need to register on the Childcare Register (CR).
- **Childcare on domestic premises:** where four or more people look after children together in someone’s home. The majority are registered on the EYR and some are registered on the CR, depending on the age of the children they look after.
- **Home childcarers:** nannies who care for children aged 0-18 wholly or mainly in the child’s own home. They are not required to register with Ofsted but may choose to do so on the Voluntary Childcare Register (VCR).

Childcare on non-domestic premises and childminders make up the majority of early years provision registered with Ofsted. Further information about provider types is available in the glossary.

Childcare in early years also occurs in the schools sector. This is discussed in the ‘Early years provision in the schools sector’ section of this document.

## Number of providers

There were 81,400 childcare providers registered with Ofsted as at 31 March 2017.<sup>1</sup> This is a decrease of 1% since 31 December 2016, and down 15% since 31 August 2012 when there were 96,200 providers.

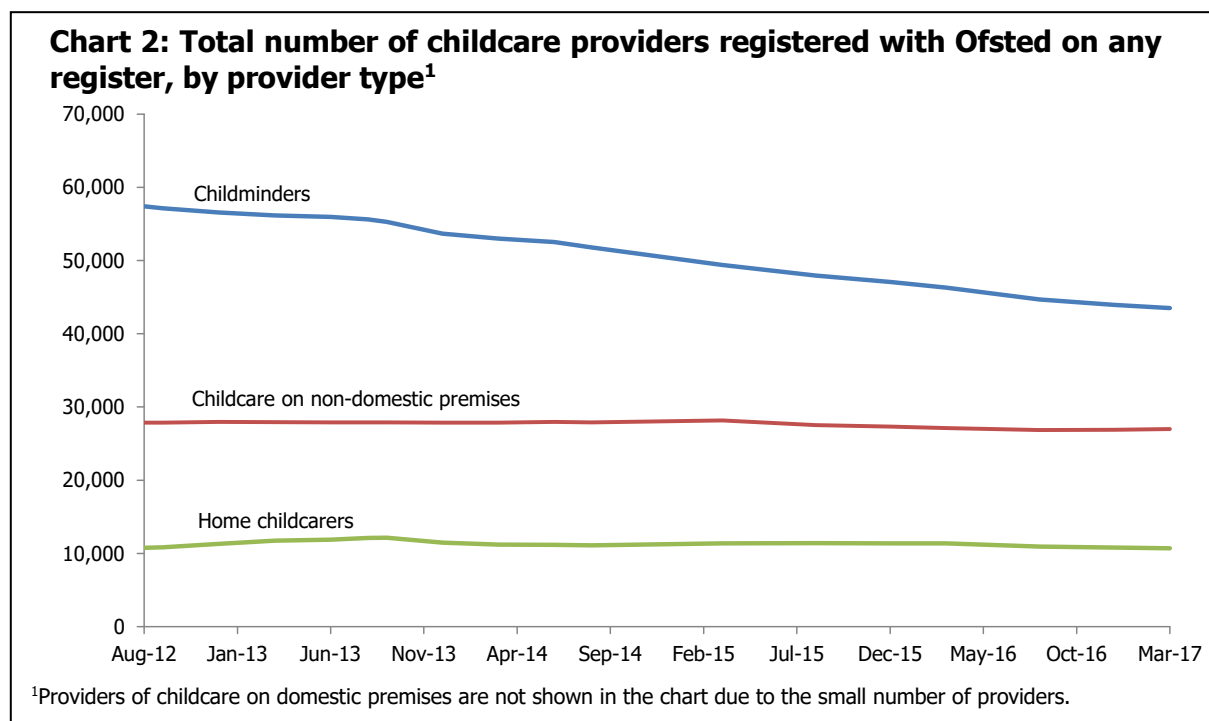
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<sup>1</sup> Figures are quoted to the nearest 100.

Looking at this decrease across the three main provider types:<sup>2</sup>

- **Childminders:** 43,500 providers as at 31 March 2017, down 500 since 31 December 2016. This continues a downward trend, with 24% fewer providers than at 31 August 2012.
- **Childcare on non-domestic premises:** 27,000 providers as at 31 March 2017, up 100 since 31 December 2016. Numbers are fairly stable over time, having decreased by only 3% since 31 August 2012.
- **Home childcarers:** 10,700 providers as at 31 March 2017, down by almost 100 since 31 December 2016. Numbers are fairly stable over time and at a similar level to those seen as at 31 August 2012. There was a peak of 12,100 home childcarers as at 31 August 2013.

Overall, childcare provider numbers have decreased steadily since August 2012. This has been driven by a large decrease in childminders, a smaller decrease in non-domestic providers, and no notable change in the number of home childcarers (Chart 2).



<sup>2</sup> Childcare providers on domestic premises are not included here as there is only a very small number registered with Ofsted (205 as at 31 March 2017).

In terms of the declining numbers of childminders, the net decrease is driven by more providers leaving than joining. For example, 1,400 childminders left the sector in first three months of 2017 and 900 joined – a net decrease of 500.

The number of providers on non-domestic premises has remained relatively stable since 31 December 2016. However, since May 2015, schools have been exempt from registering their early years provision for two-year-olds with Ofsted. This means that many schools that provide childcare for two-year-olds are not on Ofsted's Early Years Register. This may have contributed to the 4% decrease in the number of providers of childcare on non-domestic premises in the two years to 31 March 2017.

### **Regional analysis**

The number of childcare providers registered with Ofsted varies across regions, reflecting the differences in regional population sizes. London and the South East are the two regions with the largest population and also have the highest number of childcare providers (with 16,900 and 16,100 respectively). The North East region has the smallest population and the lowest number of childcare providers (2,800). The remaining regions have between 6,200 and 9,700 childcare providers.

Looking at the decreases by provider type since 31 August 2012, the largest variation across the regions was seen for home childcarers; the smallest of the three main provider types. The decreases in home childcarer numbers ranged from 20% in the East Midlands to 4% in the South East. The smallest regional variation was seen for childminders; the largest provider type. The largest regional decrease since 31 August 2012 was in the West Midlands (28%) and the smallest in Yorkshire and The Humber (21%).

Larger ranges for smaller provider types are to be expected, as smaller population sizes tend to have more statistical variation than larger ones.

## **Number of places**

### **Registers and places**

As at 31 March 2017, 81% of Ofsted registered childcare providers were on the Early Years Register (EYR).<sup>3</sup> The remaining 19% were not on the EYR, and so only appear on the voluntary (VCR) or compulsory (CCR) parts of the Childcare Register.

Childcare places data only refers to providers on the EYR and when analysing places data, it is important to note that:

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<sup>3</sup> Most of these providers are also registered on the Childcare Register (CR).

- While the majority of providers have places information recorded on the EYR, for some providers we have calculated estimates.<sup>4</sup>
- The data for the number of places include all places offered by providers on the EYR for children aged under 8 years old. Therefore, the number of places in the early years age range (0–5 year olds) is likely to be lower.
- For non-domestic providers, the number of places is likely to reflect the number of children they intend to provide childcare for.
- For childminders, the maximum number of places that they can offer if they do not have any assistants is six.<sup>5</sup> Around 70% of childminders are registered as offering six places. However, the number of places childminders provide or intend to provide is likely to be lower.

In summary, it is likely that Ofsted places data for non-domestic providers is more representative of the number of places they are likely to provide in practice than it is for childminders.

Looking at the number of childcare places by provider type,<sup>6</sup> as at 31 March 2017:

- **Childcare on non-domestic premises:** offered 80% of all childcare places – estimated to be 1.0 million places – which was an increase of two percentage points since August 2012.
- **Childminders:** offered 20% of places, amounting to 256,000 places – which was a decrease of two percentage points since August 2012.
- **Childcare on domestic premises:** offered less than 1% of places, or approximately 4,000 places.

Despite decreasing numbers of providers, the number of childcare places has remained broadly stable since August 2012 (Chart 3). Looking at the first three months of 2017, although childminder places decreased, there was a larger increase in the number of places offered by childcare on non-domestic premises. This resulted in an overall increase of 2,800 places. As at 31 March 2017, there were almost 1.3 million childcare places offered by providers on the EYR.

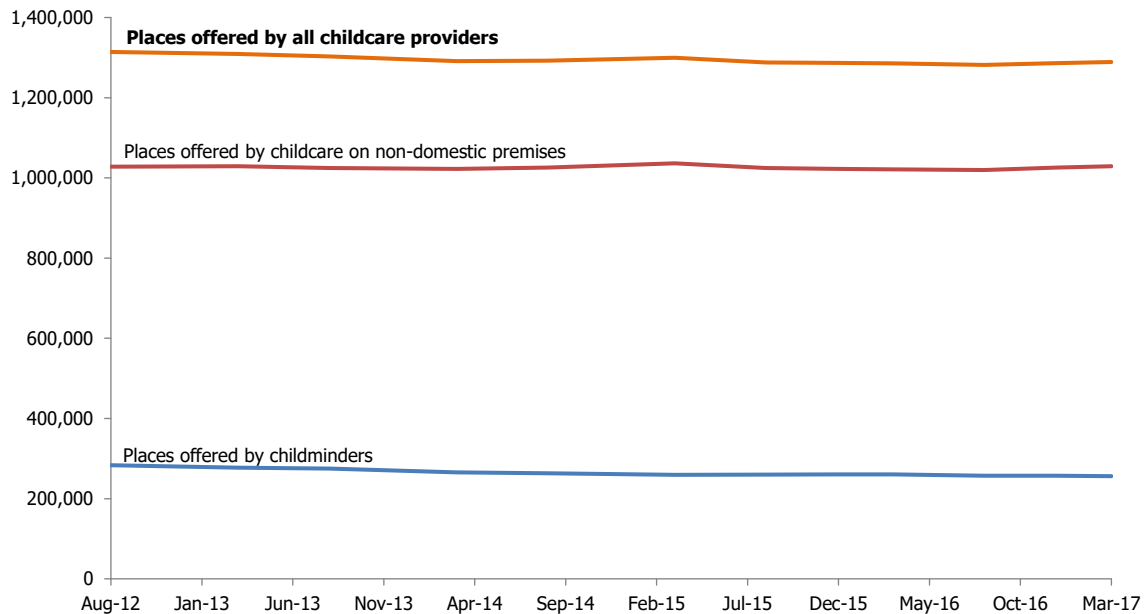
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<sup>4</sup> For more information on the estimation process, see 'Number of places' in the glossary.

<sup>5</sup> Six is the maximum number of places allowed under EYFS guidelines for childminders with no assistants: [www.gov.uk/government/publications/registration-and-suitability-handbook-childcare-providers](http://www.gov.uk/government/publications/registration-and-suitability-handbook-childcare-providers).

<sup>6</sup> Percentages do not sum to 100 due to rounding. Places numbers are quoted to the nearest 1,000.

**Chart 3: Childcare places on the EYR over time, by provider type<sup>1</sup>**



<sup>1</sup>Places offered by childcare on domestic premises are not shown in the chart due to the small number of places offered.

For providers on the EYR, the conditions of registration changed with the Early Years Foundation Stage (EYFS) update in September 2012. Since this update, providers have been required to return details on the number of places they offer at their registration and also at inspection. Prior to this, places information was only derived from the conditions of registration that applied at the time.

This will have affected the estimates for the number of places on offer by childminders on the EYR, as since this update, the majority of childminders with no assistants have registered the maximum number of places allowed under the EYFS guidelines, which is six. So, while the number of places offered by childminders has decreased by 10% since August 2012, the decrease may have been higher if there had not been a change in the registration process. Furthermore, since new childminders registering are more likely to declare six EYR places, this may mean that the legal maximum number of places becomes further removed from the number of places the childminders intend to provide.

### Providers and places

While childminder provider numbers have decreased by 24% since 31 August 2012, places offered by childminders have only decreased by 10%. This means that each individual childminder is, on average, offering a higher number of places – even though there are fewer childminders and fewer places on offer overall. As at 31 August 2012, the average number of places offered by childminders was 5.1, whereas as at 31 March 2017, the average was 6.2. This average takes into account



childminders with assistants, who are permitted to offer more than six places.

### **Introduction of 30 hours free childcare**

Interest in the number of places offered in the childcare sector is likely to increase as we approach the introduction of 30 hours free childcare for working families in England<sup>7</sup> from September 2017.

Since September 2016, the 30 hours free childcare scheme has been piloted in eight local authorities (LAs).<sup>8</sup> Seven of these have been funded for a proportion of children who are eligible for the 30 hours offer, while York has been funded for all of their eligible children.<sup>9</sup>

To consider the effect of the pilot on the supply of childcare places, we have looked at all providers in the pilot area who were inspected between September 2016 and March 2017. This subset of providers has been considered because places numbers are updated at inspection.

There was an increase in childcare places at providers who had been inspected in seven of the eight pilot LAs. Inspected providers saw an average increase in places of 6%. By comparison, across England, childcare places have increased by 1% within the same time period.

Interestingly, York – the only LA which was funded for all eligible children – had the highest proportional increase in places, at 14%. This suggests that providers in the pilot areas may have increased their supply of places as a result of the 30 hours pilot.

In terms of demand, the Department for Education (DfE) estimate that 390,000 children will be eligible for the 30 hours scheme in England.<sup>10</sup> It is likely that there will be an increase in demand for places when the scheme rolls out, but a proportion of eligible children will already be receiving childcare in the early years sector and will therefore not create additional demand.

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<sup>7</sup> Gov.uk guidance on accessing childcare support through the childcare service <http://childcare-support.tax.service.gov.uk/par/app/extendedentitlement>.

<sup>8</sup> DfE press release on the eight local authorities taking part in the 30 hours free childcare pilot: <http://www.gov.uk/government/news/thousands-of-parents-benefit-from-30-hours-free-childcare-early>.

<sup>9</sup> City of York Children's Trust Unit article about the 30 hours free childcare entitlement: <http://www.yor-ok.org.uk/families/Childcare/30-hours-free-childcare-pilot.htm>.

<sup>10</sup> National Audit Office press release: <http://www.nao.org.uk/press-release/entitlement-to-free-early-education-and-childcare/>.



## Inspection outcomes

New providers joining the EYR are normally inspected within 30 months of registration.<sup>11</sup> As at 31 March 2017, of the 66,100 providers on the Early Years Register (EYR), 81% had been inspected, with the remaining 19% yet to be inspected.

### Proportion of providers on the EYR judged good or outstanding

As at 31 March 2017, the proportion of childcare providers on the Early Years Register (EYR) judged to be good or outstanding was 93%. This is the same proportion as was seen at 31 December 2016, but is an increase from 31 August 2012 when the proportion judged good or outstanding was 74%. This increase can be attributed to the steady rise in the proportion of providers judged good, with only a small increase in the proportion of providers judged outstanding (Chart 1).

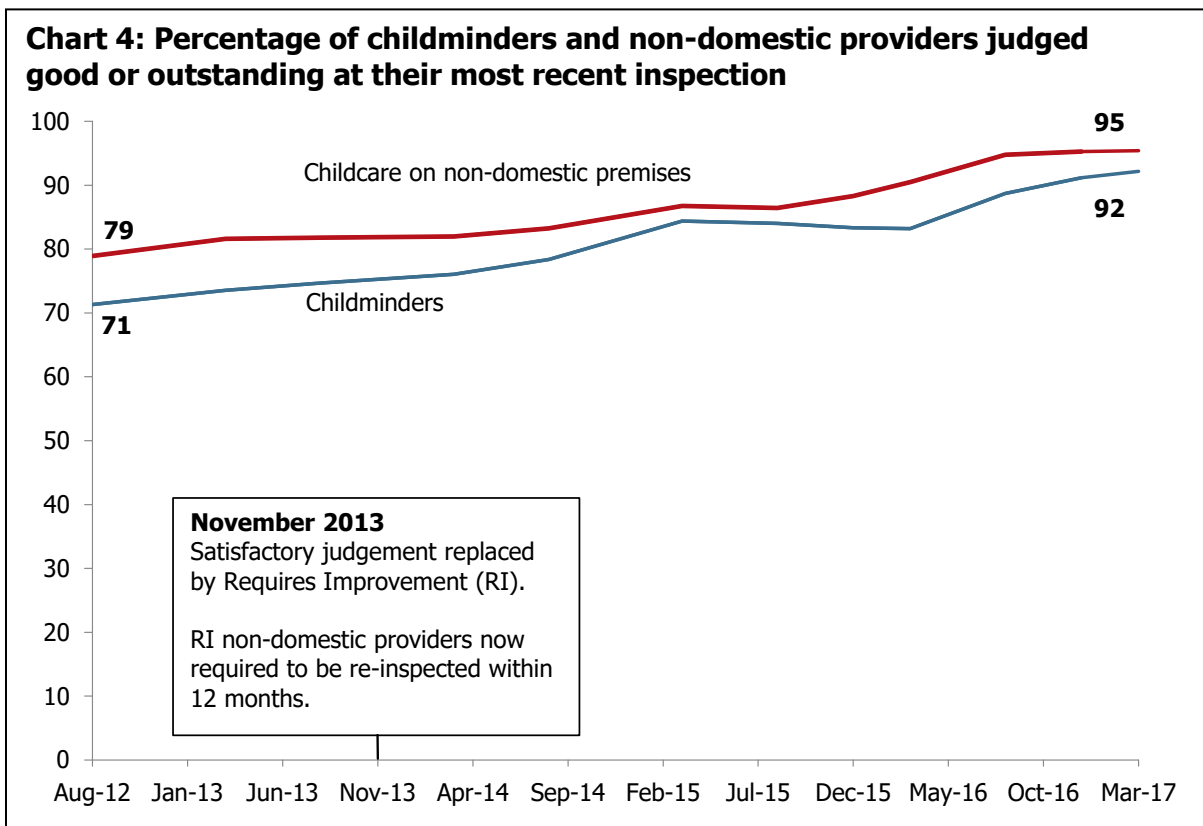
Looking at the two main provider types as at 31 March 2017 (Chart 4):

- **Childcare on non-domestic premises:** 95% were judged to be good or outstanding at their most recent inspection, the same proportion as the end of 2016. This was made up of 76% of childcare on non-domestic premises judged good and 19% judged outstanding.
- **Childminders:** 92% were judged good or outstanding, which was up one percentage point since the end of 2016. This was made up of 78% of childminders judged good and 14% judged outstanding.

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<sup>11</sup> <https://www.gov.uk/ofsted-inspection-childcare-provider> provides more information about the process of being inspected as a childcare provider.

**Chart 4: Percentage of childminders and non-domestic providers judged good or outstanding at their most recent inspection**



### Changes in the proportion of childminders judged good or outstanding

The beginning of August 2016 saw the start of the new inspection cycle<sup>4</sup>, with Ofsted prioritising childminders for inspection who had been previously judged requires improvement (RI) or inadequate.

As at 31 March 2017, looking at childminders who had previously received a judgement of RI or inadequate, 87% improved to good or outstanding. This has a double effect – the number of good or outstanding childminders increases and the number of RI or inadequate childminders decreases. This is a key factor behind the recent improvement in the proportion of childminders judged good or outstanding.

Other factors that have influenced this upward trend in the longer term are that:

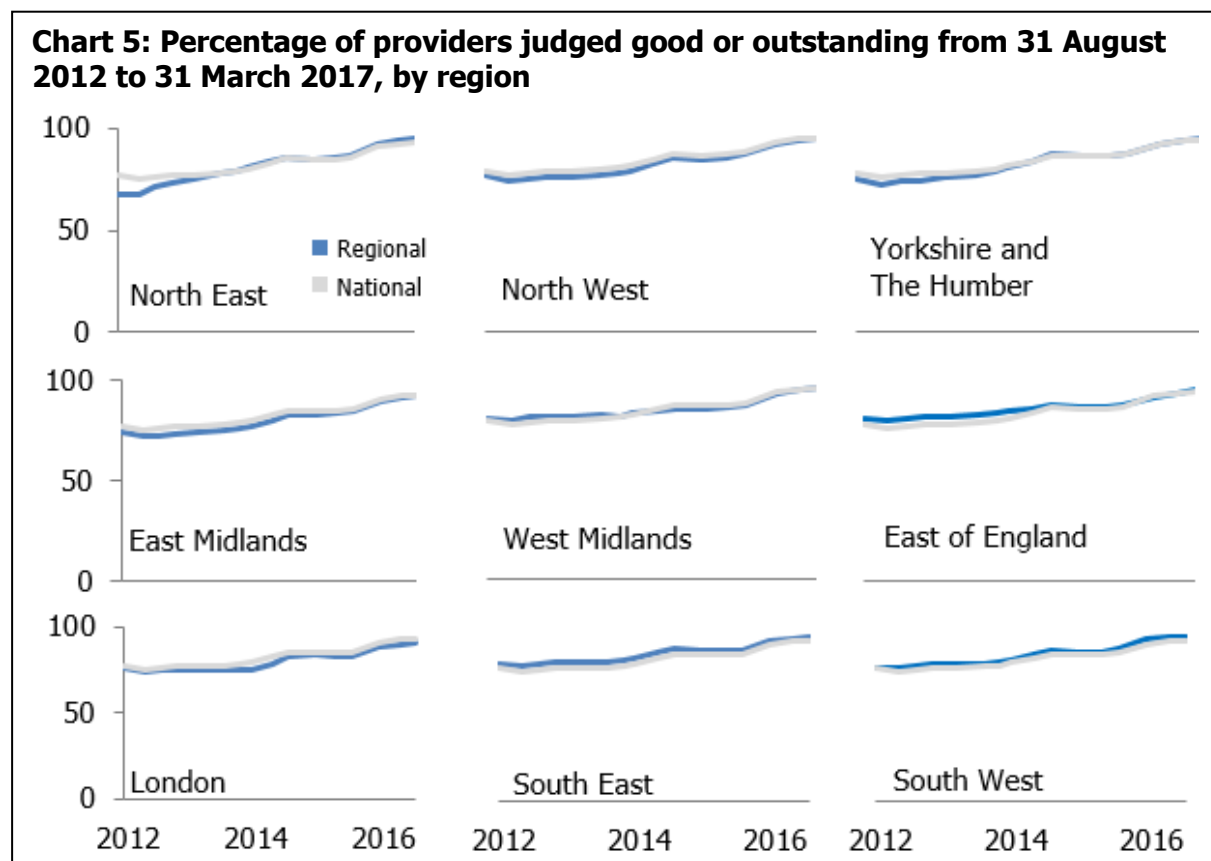
- Providers at their first inspection are more likely to be judged good or outstanding at their first inspection than they were in August 2012.
- Providers leaving the sector are more likely to have had inspection judgements of RI or inadequate than those that remain.

### Changes in the proportion of childcare on non-domestic premises judged good or outstanding

Over time, the proportion of childcare on non-domestic premises judged good or outstanding has been increasing steadily. Part of this increase can be explained by a change in the childcare inspection policy. From November 2013, all childcare on non-domestic premises judged requires improvement must be re-inspected within 12 months.<sup>12</sup> This means that non-domestic providers have had more opportunity to demonstrate improvement than they did previously.

### Regional inspection outcomes

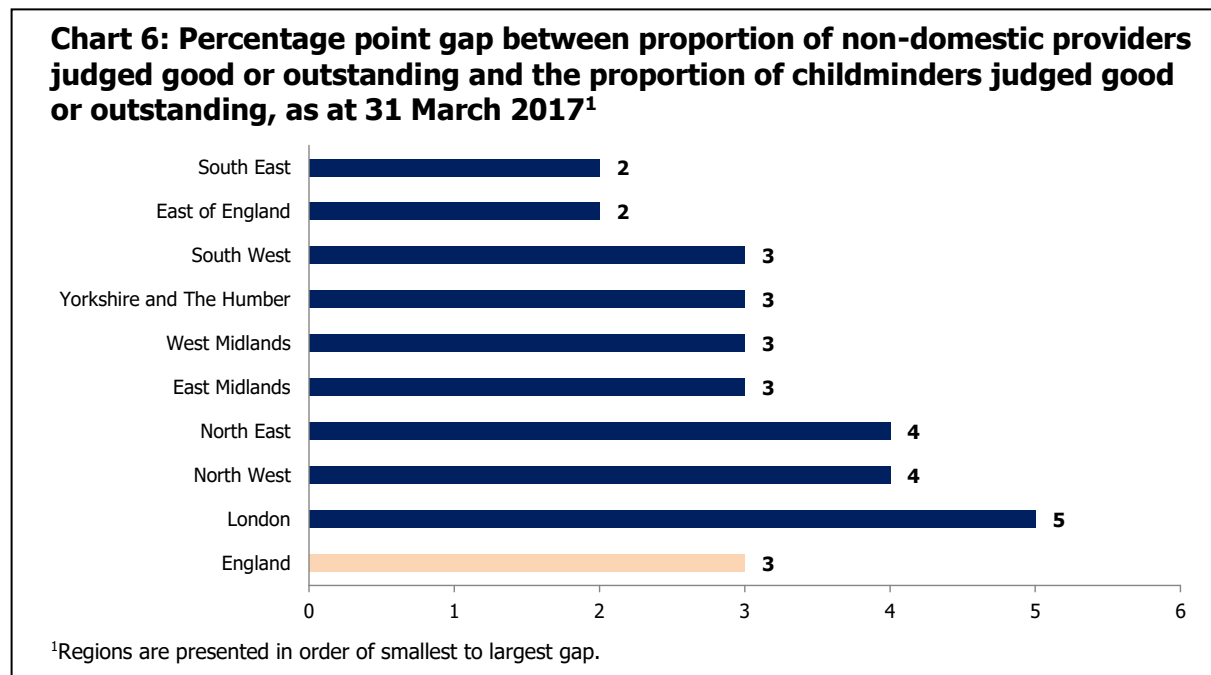
The rise in the proportion of providers judged good or outstanding over time is seen across all of the nine regions in England (Chart 5).



<sup>12</sup> Announcement of update in Early Years inspection policy from Her Majesty's Chief Inspector (August 2013): <https://www.gov.uk/government/news/ofsted-calls-for-swift-improvement-in-pre-schools-and-nurseries>

As at 31 March 2017, the proportion of all providers judged good or outstanding was highest in the South West (95%) and lowest in London (91%).

On a national level, 95% of non-domestic providers were judged good or outstanding compared with 92% of childminders – a gap of three percentage points. Across the regions, this gap ranged from 2 percentage points in the South East to 5 percentage points in London (Chart 6).



The proportion of childminders judged good or outstanding drives regional differences in the gap between the proportion of childminders and non-domestic premises judged good or outstanding.

In the South East, the gap between childminders and childcare on non-domestic premises was only two percentage points, and 94% of childminders were judged good or outstanding. Conversely, in London the larger gap of five percentage points is due to a lower than average proportion of childminders judged good or outstanding, at 89%.

## Childminder agencies

Childminder agencies were introduced in September 2014, enabling new childminders to choose to register with Ofsted directly or register with an agency. Existing childminders could also choose to deregister with Ofsted and register instead with a childminder agency. Childminder agencies have the responsibility of inspecting

the childminders who are registered with them, with Ofsted inspecting the childminder agencies.

Childminder agencies are only eligible for inspection when they have childminders on roll and there are only two overall effectiveness inspection outcomes: 'Effective' and 'Ineffective'. As at 31 March 2017, nine childminder agencies were registered with Ofsted. Of these, five had childminders on roll and were therefore eligible for inspection. Two childminder agencies have been inspected to date and both have been judged 'Effective'.

Data for childminder agencies is available from the provider level data file on the page for the Official Statistics release as at 31 March 2017:

<https://www.gov.uk/government/collections/early-years-and-childcare-statistics>.

## Early years provision in the schools sector

Childcare in early years also occurs in the schools sector. This takes place in maintained nursery schools (state-run nurseries), and early years provision within maintained schools and academies.

As at 31 March 2017, there were 402 maintained nursery schools in England.<sup>13</sup> Of these, 400 had been inspected and 100% (to the nearest percent) received a grade of good or outstanding at their most recent inspection.

In maintained schools and academies, early years provision is given its own sub-judgement as part of the overall inspection of the school. Of all early years provision in maintained schools and academies, 89% were judged good or outstanding for their early years provision sub-judgement as at 31 March 2017.

For more information on school inspections and outcomes, please refer to Ofsted's official statistics on maintained schools and academies inspections and outcomes:

<https://www.gov.uk/government/collections/maintained-schools-and-academies-inspections-and-outcomes-official-statistics>.

Many independent schools also provide nursery provision.<sup>14</sup> The most recent published data on non-association independent schools relates to the sector as at 31

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<sup>13</sup> School inspections outcomes: management information as at 31 March 2017 – <https://www.gov.uk/government/statistical-data-sets/monthly-management-information-ofsted-school-inspections-outcomes>

<sup>14</sup> Ofsted only inspect non-association independent schools. Association independent schools are inspected by the Independent Schools Inspectorate (ISI) – <http://www.isi.net/> – or the School Inspection Service (SIS) – <https://www.schoolinspectionsservice.co.uk/>

August 2016, because official statistics on these schools are published twice a year.

For more information, please see Ofsted's official statistics on non-association independent schools: <https://www.gov.uk/government/collections/independent-schools-inspections-and-outcomes>.

## Notes

An explanation about key uses of this data, further contextual information and the arrangements for quality assurance is provided in the methodology and quality report which accompanies this release.

The methodology and quality report also provides information on the strengths and limitations of the statistics.

### Revisions to previous release

The provisional data in the previous release related to inspections which took place between 1 September 2016 and 31 December 2016 and were published by 31 January 2017. A revised list of inspections in this period is provided in Tables 14–19 of the 'Childcare providers and inspections charts and tables' document for this release. This revised data includes eight inspections that were published by 30 April 2017 (that were not published by 31 January 2017).

These revisions did not result in any changes to the key findings identified in the previous publication.

Revisions to data in this publication are published in line with Ofsted's revisions policy for official statistics, which can be found here:

[www.gov.uk/government/publications/ofsted-standards-for-official-statistics](http://www.gov.uk/government/publications/ofsted-standards-for-official-statistics).

### Common Inspection Framework (CIF)

Inspections from 1 September 2015 were carried out under the Common Inspection Framework (CIF), meaning that the inspection judgements are common across the Early Years, Schools and Further Education and Skills remits. Ofsted evaluates the overall quality and standards of the early years provision in line with the principles and requirements of the EYFS. Inspectors judge the overall effectiveness of the early years provision, taking into account four key judgements:

- quality of teaching, learning and assessment;
- personal development, behaviour and welfare;
- effectiveness of leadership and management;

- outcomes for children.

Ofsted is required to inspect all providers who were on the Early Years Register (EYR) on 1 August 2016 at least once by 31 July 2020. Providers who have registered after this date will normally be inspected within 30 months of registration.

## Glossary

Under the Childcare Act 2006

(<http://www.legislation.gov.uk/ukpga/2006/21/contents>) childcare providers register on either or both of two registers:

- **Early Years Register (EYR)**

The EYR is for providers who care for children in the early years age group, from birth to 31 August following their fifth birthday. Registration is compulsory for such providers and they must meet the requirements of the Early Years Foundation Stage (EYFS).

All providers on the EYR are inspected on a four year cycle. The last inspection cycle ran from 1 September 2012 through to 31 July 2016. The current inspection cycle runs from 1 August 2016 through to 31 July 2020.

- **Childcare Register (CR)**

The CR is for providers who care for children from birth to 18 years. It has two parts:

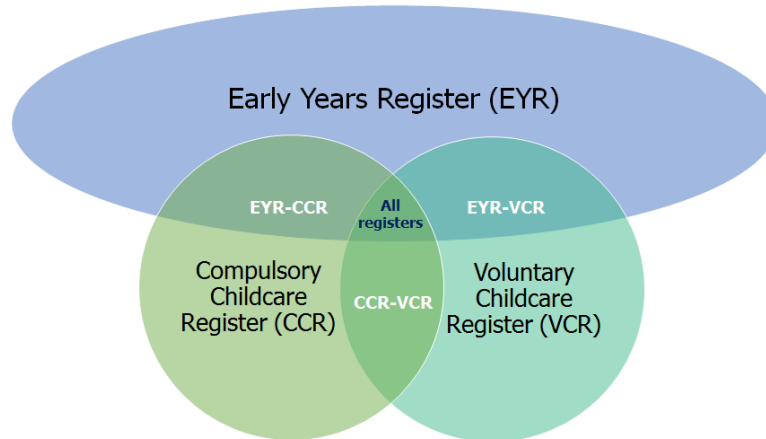
- Compulsory Childcare Register (CCR) – for providers caring for children from 1 September after the child's fifth birthday up until their eighth birthday.
- Voluntary Childcare Register (VCR) – for providers for whom registration is not compulsory, for example nannies, or providers who care for children aged eight and over.

Providers who are registered on either part of the Childcare Register do not need to submit their places information to Ofsted.

For providers registered on the Childcare Register, Ofsted inspects a sample of 10% of active providers per year.



### Venn diagram showing the Ofsted registers for childcare providers



### Early Years Foundation Stage (EYFS)

The EYFS is the statutory framework for the early education and care of children from birth to 31 August following their fifth birthday:

<https://www.gov.uk/government/publications/early-years-foundation-stage-framework--2>.

### Childcare providers

Childcare providers care for at least one individual child for a total of more than two hours in any one day. This is not necessarily a continuous period of time. They must register to care for children under the age of eight, unless under exceptional circumstances, and can choose to register to care for older children.

### Domestic premises

These are any premises which are wholly or mainly used as a private dwelling.

### Childcare providers on domestic and non-domestic premises

If four or more people look after children at any one time in someone's home, they are providing childcare on domestic premises, not childminding. Childcare providers on non-domestic premises are people or organisations providing care for individual children in premises that are not someone's home. These premises can range from converted houses to purpose-built nurseries.

### Childminder

This is a person who is registered to look after one or more children, to whom they are not related, on a domestic premises for reward. Childminders can work with no more than two other childminders or assistants. They must register if they care for children under the age of eight, and can choose to register if they care for older children. They care for:

- Children on domestic premises that are not usually the home of one of the children unless they care for children from more than two families, wholly or mainly in the homes of the families.
- At least one individual child for a total of more than two hours in any day. This is not necessarily a continuous period of time.

### **Childminder agencies**

Childminder agencies were introduced in September 2014 as an option for childminders to register with. Childminders who register with an agency no longer need to register or be inspected by Ofsted, although the agency itself will receive an inspection.

Childminder agencies are only eligible for inspection by Ofsted when they have childminders on roll. Childminder agencies have the responsibility of inspecting the childminders who are registered with them.

### **Home childcarers**

Home childcarers are usually nannies who care for children of any age up to their 18th birthday wholly or mainly in the child's own home, and care for children from no more than two families. They are not required to register with Ofsted but may choose to do so on the voluntary part of the Childcare Register.

### **Inspection cycles**

All providers on the Early Years Register which were registered before the start of Ofsted's four year inspection cycle are inspected within the cycle. The previous inspection cycle ran from 1 September 2012 to 31 July 2016. The current inspection cycle runs from 1 August 2016 to 31 July 2020. New providers joining the EYR are normally inspected within 30 months of registration. For providers on the CCR, a sample of 10% of active providers are inspected per year.

### **No Children on Roll (NCOR)**

If there are no children present on the day of the provider's inspection, they receive an NCOR inspection. The inspector will make a judgement on the 'Overall quality and standards of the early years provision', with three possible outcomes:

- met
- not met - actions
- not met - enforcement action

### **Number of places**

Registered places are the number of children that may attend the provision at any one time. Registered places are not the number of places occupied, nor the number of children who may benefit from receiving places through providers offering

sessions at different times of the day. Place numbers are only collected for providers on the EYR. Provider type averages are used to estimate the number of places for a very small number of providers whose place numbers are not available at the time of the analysis. There may also be small discrepancies in totals due to rounding.

### **Joiners and leavers**

Joiners are childcare providers that have registered with Ofsted during this reporting period. Most of these are new registrations, but the joiners and leavers charts and tables within the 'Childcare providers and inspections charts and tables' document also include providers with re-activated registrations and those that have changed provider type or register. At the local authority or regional level, this may also include providers that have relocated into a new geographical area.

Leavers are mostly childcare providers that have left Ofsted during the reporting period. Most of these are resignations, but some are also providers that have had their registration cancelled or have changed provider type or register. At the local authority or regional level, this may also include providers that have relocated out of a geographical area.

### **Further information**

Ofsted publishes information on the inspection of early years providers on the gov.uk website:

[www.gov.uk/government/collections/early-years-and-childcare-statistics](http://www.gov.uk/government/collections/early-years-and-childcare-statistics)

[www.gov.uk/government/publications/common-inspection-framework-education-skills-and-early-years-from-september-2015](http://www.gov.uk/government/publications/common-inspection-framework-education-skills-and-early-years-from-september-2015)

[www.gov.uk/government/publications/framework-for-the-regulation-of-provision-on-the-childcare-register](http://www.gov.uk/government/publications/framework-for-the-regulation-of-provision-on-the-childcare-register).

### **Contact for comments or feedback**

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