BRITISH EDUCATIONAL SUPPLIERS ASSOCIATION

Educational Suppliers Action Plan

This action plan sets out a sector-led programme to grow the international contribution of UK educational suppliers in support of the International Education Strategy. It identifies the sub-sector's distinctive offer, the evidence base for market prioritisation, the practical barriers suppliers face, and the actions BESA and partners will take to increase sustainable exports while complementing wider UK education objectives.

1. Where the Sub-Sector Is Now Internationally

A. Sub-Sector Distinctive International Offer

The UK education suppliers sub-sector offers a broad, connected range of products and services, shaped by suppliers' experience of working with schools, institutions, governments and delivery partners across international markets. The offer includes:

- Curriculum content, teaching resources, assessment and qualifications.
- Educational technology, including AI-enabled learning, data and school-management systems.
- Early years, inclusion, special educational needs and disabilities, furniture, equipment and school-support services.

This enables UK suppliers to support education systems from early years through to lifelong learning. It complements the wider UK international education offer and supports the International Education Strategy by strengthening trusted UK partnerships, widening routes to market and contributing to sustainable export growth.

The sub-sector's distinctive strengths are:

- **Integrated education ecosystem.** Suppliers work alongside British curriculum schools, awarding organisations, universities, skills providers and English-language organisations.
- **Recognised content and standards.** UK curriculum, assessment, qualifications and learning resources extend the reach of British education.
- **Innovation and adaptability.** Suppliers combine pedagogical expertise with digital, AI-enabled and data solutions, and can tailor services for different markets.
- **Specialist and system-level reach.** The offer spans inclusion, early years, literacy, numeracy, science, infrastructure and whole-school systems, with larger organisations helping smaller suppliers access markets.
- **Export and soft-power value.** The UK education suppliers sub-sector benefits from both SME exporters and larger anchor partners. Sector lead companies can help open routes to market, share intelligence and support collaboration models that enable smaller suppliers to participate on a transparent, non-exclusive basis.

B. The Current Operating Environment

BESA's Export Report June 2026 shows SME member export sales grew by 3% to £437m. The three largest anchor partners are estimated to add £4.6bn, based on published accounts, giving a total supplier export baseline of £4.9bn for the year ending April 2025. Around 88% of BESA members are now exporting, up from 75% in 2025, equivalent to roughly 330 SMEs. This provides a positive but practical baseline for growth: the sector is already internationally active, while further progress depends on clearer prioritisation, stronger routes to market and co-ordinated support from sector and government partners.

The main operating routes below show how that export baseline can be converted into growth, by expanding proven routes into institutions, school groups, digital channels, government systems, donor-funded programmes and market-development activity.

- Direct sales to education institutions, distributors and school groups.
- Digital subscriptions, licensing and online delivery.
- Sales to British and other international schools.
- Partnerships with ministries, regulators, system operators and donor-funded programmes.
- Trade shows, UK pavilions, missions and market-development activity.

British curriculum schools overseas remain an important route to market because they buy UK educational supplies and generate export income. Evidence used later in this plan shows that 61% of British curriculum schools overseas bought from UK suppliers, and that overseas pupils contribute £1.3bn to GDP. BESA and the international schools sector have agreed that closer collaboration and better data would support a practical supplier-participation programme.

BESA already runs international pavilions and works with event organisers, commercial partners and government teams. Recent activity in Saudi Arabia illustrates the model: BESA leads the supplier delegation and pavilion, while Embassy and government teams support correspondence, stakeholder engagement, introductions and promotion where this aligns with wider UK objectives and local priorities.

C. International Market Access Barriers

Barrier	Market / region affected	Impact on international growth	Evidence / source	Practical solution / mitigation	Link to IES ambition
High cost of initial market entry and trade-show participation	Priority and growth markets, particularly for smaller suppliers	Reduces first-time exporter participation, visibility and opportunities to build in-market relationships	BESA has already submitted a detailed TAP evidence paper to government; further quantified outcome evidence remains necessary.	BESA to run UK pavilions and develop evidence on supplier outcomes. Subject to ministerial and funding decisions, government could consider a TAP-style mechanism for eligible education suppliers, with BESA tracking longer-term outcomes and additionality.	1 and 3
Limited access to government buyers, school groups and trusted partners, especially for sector lead companies and those looking to grow at scale	Saudi Arabia, India, Nigeria, Indonesia, Vietnam and other complex markets	Lengthens sales cycles and increases the risk of selecting unsuitable partners	Embassy engagement in Saudi Arabia has enabled official channels, stakeholder introductions and possible roundtables with major education organisations. Interviews with Pearson and Cambridge University Press and Assessment June 26 cited lack of access as key blocker.	BESA to prepare delegations and market propositions; Sir Steve Smith, Posts, BIST, FCDO and British Council to support appropriate introductions, convening and official channels where this aligns with local priorities, capacity and normal due-diligence requirements.	1 and 3
Uneven availability of in-market education expertise and support, including clarity on the most appropriate education, export and SME contacts.	Markets where education responsibilities are dispersed, teams change frequently, or supplier support routes are not clearly signposted.	Makes it difficult for suppliers to identify the appropriate contact or sustain commercial follow-up	BESA SAP member survey evidence from June 2026 requested clearer explanation of the support available from government and strengthened continuity of in-market sector expertise. In Brazil, current BIST team criteria limit support to companies with £10m of exports in the region, which excludes most companies seeking initial or growth-stage support.	BESA to provide concise sector briefings and a single supplier contact point. Practical support sought from Posts, BIST and embassies to identify named education contacts, signpost suppliers to existing services and communicate eligibility routes clearly for companies at different stages of export growth.	1 and 3
Market-specific regulation, procurement, localisation and payment risks	Varies by market and supplier type; examples include payment risk in Saudi Arabia and Egypt, and regulatory or paperwork requirements affecting procurement in the EU.	Delays entry, raises compliance costs and can prevent contract delivery	30% of respondents in BESA Export Report 2026 said that regulatory barriers had caused their company to delay or reduce activity in export markets.	BESA to issue market-entry guidance, share aggregated barriers with ESAG and signpost UK Export Finance and specialist advice.	3

Insufficient comparable market intelligence	All potential priority markets	Risks spreading limited resources too thinly and selecting markets without a viable route to delivery	Feedback asked for stronger evidence and clearer governance of market prioritisation. Evidence source: BESA SAP member survey evidence, June 2026.	Introduce an annual tiered-market assessment using export data, supplier demand, international school presence, government projects, route-to-market feasibility and delivery-partner capacity.	1 and 3
Geopolitical instability, conflict and supply-chain disruption	Middle East; Ukraine; US	Curbs opening of international schools; reduces ability to move goods globally; shortage of IT hardware; inability to travel and service customers	Political or geopolitical risk was cited as the main barrier by 39% of respondents in the BESA Export Report 2026. cancelled events such as HCI April 2026; shortage of IT components affecting hardware and software suppliers;	Use local partners, BIST and Post networks where appropriate to support in-country delivery, contingency planning and customer servicing.	1 and 3

2. Future ambition

D. International Ambitions for the Sub-Sector

By 2030, the sub-sector will grow sustainable exports by helping more UK suppliers enter selected markets and build repeatable routes to schools, governments, institutions and partners. **Ambition 3 — export growth — is the primary focus**, supported by Ambitions 1 and 2.

IES AMBITION	SUB-SECTOR AMBITIONS THAT CONTRIBUTE TO IES
Increase the UK's international standing through education and make the UK the global partner of choice at every stage of learning.	Present a coherent UK supplier offer through events and government engagement, showcasing trusted education technology, AI-enabled tools, curriculum, assessment, inclusion, early years and infrastructure capability. Use sector leaders, international schools and ESAG partners to show the breadth of UK education
Continue to sustainably recruit high-quality international students from a diverse range of countries.	Support early engagement with UK curricula, assessments, qualifications, English-language resources and education brands. Work with Study UK, the British Council and ESAG partners where joint activity links schools, skills, higher education and suppliers. Evidence: 61% of British curriculum schools overseas bought from UK suppliers; overseas pupils contribute £1.3bn to GDP and support the pipeline to UK universities.
Collectively grow education exports to £40 billion per year by 2030.	Increase the number of exporters, export value in selected markets and conversion from activity to contracts. Expand repeatable models including subscriptions, licensing, distribution and partnerships. Baseline: £4.9bn exports for year ending April 2025, using BESA Export Report 2026 and Companies House data; target: £6bn by 2030, a 22% increase.

E. International Markets

The sub-sector will use a tiered market model, reviewed annually.

Tier 1 — IES priority markets

- Saudi Arabia: strong government education investment, demand for school development and technology, and existing BESA, Embassy and event relationships.
- India: scale across schools, skills and higher education, with potential for a cross-ESAG pavilion.
- Vietnam: potential for school, curriculum and technology solutions; stronger evidence needed.
- Indonesia and Nigeria: aligned to IES, but supplier demand, route to market and event evidence need strengthening before major BESA-led activity.

Tier 2 — evidenced growth markets

- United Arab Emirates and wider Gulf: established demand, strong international-school ecosystem and viable education events.
- Malaysia and wider South-East Asia: opportunities for technology-enabled provision and regional engagement.
- Brazil: supplier interest and major education-event platform, balanced against language and entry barriers.
- Singapore: regional hub and route into wider South-East Asia.
- China and Hong Kong: Hong Kong international-school growth and AI investment are driving demand.

BESA Annual Member Survey data from November 2025 and the BESA Export Report 2026 show the UAE as the main export market of interest, followed by Saudi Arabia and the wider Middle East. Members also show strong interest in South-East Asia, including Vietnam, as well as Brazil, Europe and Hong Kong/China. Annual survey evidence will inform future priorities alongside delivery feasibility, partner capacity and alignment with IES markets.

Tier 3 — watchlist

Watchlist markets will be monitored where supplier demand, international-school growth, education reform or delivery partners emerge. Countries will be scored against the market-selection criteria before moving to Tier 2.

Market-selection criteria

- Export value and growth.
- Supplier demand and readiness.
- British and international-school presence.
- Government or institutional opportunities.
- Strength of partners and Posts.
- Regulatory, language, payment and political risk.
- Viable trade show or mission route.
- Scope for cross-ESAG collaboration.

F. Sub-Sector Actions

#	IES Ambition	Proposed Action	Suggested Lead	Timeline QTR & Year	KPI / Measure	Key Dependencies
1	3	Establish a publishable supplier export baseline and annual reporting mechanism.	BESA	Q3 2026; annual	Baseline is BESA annual export data; export value tracked via survey and export wins from events	Member participation; confidentiality clearance
2	1 and 3	Apply and annually refresh the tiered market model.	BESA	Q4 2026; annual	Markets scored; priority list agreed; evidence briefs completed	Export data; BESA members survey findings; BIST; partner intelligence
3	1 and 3	Deliver a focused programme of BESA-led UK pavilions, missions, buyer activity and in-market access support, including supplier briefings, curated introductions and official-channel engagement.	BESA with commercial partners, BIST, Posts and British Council support	From Q1 2027	Companies participating; first-time exporters; qualified meetings; introductions; partnerships; leads and wins	Event viability; supplier demand; named in-market contacts; BIST, Sir Steve Smith, Posts, Embassy and British Council support; appropriate due diligence
4	3	Design and administer a monitored TAP-style matched-support mechanism for education suppliers.	BIST	Subject to funding and design decisions; proposed development in 2026 with potential pilot from 2027.	SMEs supported; additional participation; outcomes at agreed follow-up points; business wins	Funding approval; transparent criteria; reporting agreement
5	1, 2 and 3	Develop a programme to increase participation of UK suppliers in international school markets through targeted initiatives with BISAG associations and BESA, including clearer school engagement, supplier matching and shared evidence on purchasing opportunities.	BISAG working with BESA	Pilot in 2027	Schools engaged; suppliers introduced; purchasing opportunities identified	School participation; shared data definitions
6	1 and 3	Publish and promote a clear UK EdTech, curriculum provider and AI-enabled international proposition to improve continuity and sector expertise. Combine this with material promoting the importance of British international schools and the value of both to the IES.	BESA, ISC and BISAG and participating suppliers. To be circulated to embassies, British Council and FCDO offices globally	2027	Case studies; suppliers featured; international engagements.	Supplier evidence; responsible-AI and impact material; ISC/BISAG; embassies and overseas offices to circulate and engage
7	3	Use sector lead companies as strategic enablers of market access. Leverage their knowledge and expertise to build collaborations that support SMEs. Explore options to re-establish or adapt an Export Champion-style model.	Pearson, Cambridge University Press and Assessment: BESA working with BIST	Q4 2026	Number of sector lead engagements; number of sector lead companies participating in scheme; growth in combined export business of these sector leads	Sector lead companies; BIST; Sir Steve Smith; Post: Ability to identify and recruit Export Champions; establishment of useful engagement mechanisms

G. Delivery Enablers

Delivery Enabler	How It Supports Delivery	Who Can Access / Use It	What More Is Needed	Link to IES Ambition
TAP-style matched support	Lowers the cost of first market entry while retaining supplier co-investment	Smaller and first-time exporters	Practical funding, criteria and outcome tracking	3
BESA-led UK pavilions	Aggregates suppliers, improves visibility and reduces duplication	Suppliers across the sub-sector; other ESAG partners where markets and objectives align, e.g. India for Study UK and UKSP.	Multi-year event prioritisation and partner commitments	1 and 3
Posts, Embassies and FCDO channels	Convening, official correspondence and access to senior stakeholders	Prepared supplier delegations	Early planning and clear, specific requests	1 and 3
British Council and Study UK networks	Market intelligence, education relationships and cross-sector promotion	Suppliers and ESAG partners	Joint market plans where priorities overlap	1, 2 and 3
UK Export Finance and export advice	Helps companies assess payment, financing and delivery risks	Eligible exporters	Better sector signposting and case studies	3
Sector lead organisations and international-school networks	Provide trusted routes to governments, institutions and schools	Large and small suppliers	Defined collaboration models and safeguards against favouring individual companies	1 and 3

H. Delivery Partners

Delivery Partner / Group	Role in Delivery	Actions They Support	Engagement Approach	Dependencies / Risks
BESA and education suppliers	Lead, coordinate, deliver and report	1–7	Working groups, surveys, events and annual reporting	Member capacity and data participation
BIST international education teams, Sir Steve Smith and Posts	Practical market access, introductions, branding and coordination	3, 4 and 6	Costed, market-specific proposals led by BESA.	Policy alignment, available resources and in-market capacity will shape the pace and scale of delivery, so BESA-led proposals should be costed, prioritised and agreed with relevant partners before commitments are made.
FCDO and British Embassies	Official channels and senior stakeholder engagement	3 and 6	Early briefing and defined requests	Diplomatic priorities and availability
British Council / Study UK	Networks, intelligence and joint activity	2, 3 and 6	Joint planning in overlapping markets	Funding and programme alignment
ISC, BISAG, COBIS, AoBSO and international-school partners	Connect suppliers with school networks and purchasing insight	5 and 6	Joint pilot and shared evidence framework	School engagement and data quality
UK Skills Partnership, Universities UK and other ESAG members	Cross-sector propositions and shared market activity	2, 3 and 6	Market-specific collaboration	Different timelines and priorities
Event and market partners	Pavilion delivery, buyer engagement and market intelligence	3	Formal delivery plans and agreed responsibilities	Commercial viability and service quality
Sector lead suppliers and assessment organisations	Case studies, convening power and routes into institutions	6 and 7	Transparent, non-exclusive collaboration	Avoiding over-reliance on individual companies

I. Progress Reporting to ESAG

KPI / Measure	Reporting Point / Date	What Success Looks Like	Target / Milestone	Evidence Source	Reporting Owner
Aggregate supplier export revenue	Annual	Sustained growth from the validated baseline	£6bn total exports by 2030	BESA Export Report 2026 + lead supplier audited accounts	BESA
Number of suppliers exporting	Annual	More suppliers exporting, including first-time exporters	429 SME exporters by 2030	BESA Export Report 2026	BESA
Participation in pavilions, missions and supported activity	After each activity; annual roll-up	Increased SME and first-time exporter participation	8 companies per pavilion 2027; rising to 20 companies per pavilion in 2030	BESA event records	BESA
Qualified opportunities, contracts and export value influenced	Follow-up after activity; annual	Improved conversion from introductions and events to business	Reporting at 3- and 6-month intervals post-event. Establish baseline for each event by end 2027 and set 2030 target.	Supplier surveys and case studies	BESA with suppliers
Market access and partnership outcomes	Annual	More ministries, school groups, buyers and delivery partners engaged	Establish baseline by end 2027 and set 2030 target.	BESA, Posts and partner reports	BESA

Evidence base: This action plan draws on BESA Export Report 2026, BESA Annual Member Survey data from November 2025, BESA SAP member survey evidence from June 2026, published accounts for the three largest anchor partners, and engagement with BESA members, sector lead companies, BISAG associations and delivery partners.

BESA will review progress annually, report through ESAG and recommend changes to market priorities or delivery actions where evidence shows limited impact.