
INDEPENDENT SCHOOLS COUNCIL

School Sector Action Plan

1. Where the Sub-Sector Is Now Internationally

A. Sub-Sector Distinctive International Offer

The schools sector plays a prominent role in meeting global demand for British-style education. This action plan covers three connected routes: UK schools establishing campuses overseas, international British schools operating outside the UK, and overseas pupils studying at schools in the UK.

The distinctive offer provided by the school sector is based on:

- A broad schools offer enables international families to enrol their children at schools in the UK or educate them in schools offering British-style education in their home country. The ISC Census records 134 overseas campuses set up by UK independent schools, alongside over 4,000 established international British schools operating across all parts of the world.
- The global currency of British qualifications (GCSEs, A Levels) which draw families to the UK and supports the popularity of British curriculum schools overseas. Learning in English and gaining British qualifications which are recognised throughout the world gives pupils a platform to be globally mobile and to work in an international business environment.
- The name recognition of well-known UK independent schools, often in the boarding sector, remains attractive to overseas families. The Department for Education accreditation scheme, British Schools Overseas, offers overseas families assurance that an international school meets very similar standards to independent schools in England.
- The reputation of UK independent schools for quality and innovation. Parents in many international markets actively seek schools that combine academic rigour, co-curricular breadth and the pastoral ethos traditionally associated with British independent education.
- The role of schools within the education system linking to both early years and higher education. Independent schools are a pipeline to British universities with many international students staying on to continue their studies.
- The network of UK and international school associations provides local market knowledge, quality assurance, and expertise that can help in building relationships and promoting the British brand.

Through this international offer, the schools sector delivers tangible benefits for the UK, with sector bodies leading delivery and government support focused on enabling market access, promotion and strategic international engagement.

- **Economic value:** Government data shows the schools sector contributed £3.16bn of education-related exports in 2024, comprising £1.13bn from education exports and £2.03bn from transnational education.
- The £1.13bn education exports figure is based on school fees paid by overseas pupils, whose parents are overseas, at UK-based schools. Oxford Economics research shows that, once wider spending by pupils and their families is included, overseas pupils contribute £1.3bn to UK GDP each year.
- **Soft power:** The alumni network of pupils who have studied at UK independent schools and international British schools builds friendships and cultural connections. Many overseas politicians, financiers and business leaders have studied at British schools, contributing to the UK's soft power.
- **Cultural connections:** Overseas pupils coming to the UK will enrich their school communities and foster intercultural understanding, preparing all pupils for global citizenship.

B. The Current Operating Environment

References to ISC Census 2026, ISC Research, Home Office child student visa data, Oxford Economics and BESA should be checked against the final evidence pack before publication, with source dates and definitions applied consistently throughout.

UK schools setting up campuses overseas

The ISC Census 2026 recorded 134 overseas campuses operated by ISC schools. This is 19 more than the previous year (14% increase) and over double the 58 recorded in 2019. Pupil numbers have similarly grown, with a 12% annual increase in 2026 to 97,500. Since 2019 the number of pupils educated in these schools has grown by 146%.

China remains the largest market in the 2026 ISC Census, with 44 schools. There are 83 schools across China and the Far East, representing 62% of the total. Recent regulatory and curriculum changes in China are likely to affect the pace of new openings, so the sector expects growth to be more measured in that market while opportunities continue elsewhere in the region. The next biggest market is the Middle East, with 29 schools or 22% of the total, including 11 schools in the UAE.

International British Schools

International British schools are the largest part of the overseas market with 4,306 schools in 2026 (ISC Research), an increase of 8% over the last 5 years. These schools educate 2.4m pupils representing a 15% increase since 2021. International British schools are strategic partners of the UK, extending Britain's educational influence, strengthening international relationships, and building global connections. They employ 230,000 teaching staff, supporting a flow of teachers to and from the UK, with UK teachers sometimes working abroad before returning to teach at home.

Overseas pupils studying at schools in the UK

The latest ISC Census 2026 shows there were 22,941 overseas pupils, whose parents are overseas, studying at UK independent schools, with 97% boarding. This is 12% lower than two years earlier, equivalent to around 3,200 pupils. Home Office data on child student visas issued for study at a UK independent school shows a 20% reduction over the latest twelve-month period, with 10,446 visas issued in 2025/26 (Q3 2025 to Q2 2026), compared with 13,022 in the equivalent period in 2024/25.

The ISC Census shows China and Hong Kong remain the most popular countries for overseas pupil recruitment although their numbers have fallen in recent years. European countries, particularly Germany and Spain, perform strongly.

C. International Market Access Barriers

Barrier	Market / Region Affected	Impact on International Growth	Evidence / Source	Practical Solution / Mitigation	Link to IES Ambition
Finding suitable overseas partners for TNE activity	UK schools setting up overseas campuses.	Can slow or prevent schools establishing overseas campuses and progressing market opportunities.	Feedback from individual schools.	Appointing school export champions, targeted trade missions.	1 & 3
Navigating local regulatory systems when setting-up schools overseas	UK schools setting up overseas campuses.	Can slow or prevent schools establishing overseas campuses and progressing market opportunities.	Feedback from individual schools.	Work with BIST's Education and market access teams and FCDO and BIST's overseas network to identify and overcome regulatory market access barriers	1 & 3
Ensuring consistent safeguarding and quality standards across different countries	International British schools and overseas campuses.	School growth must go hand in hand with good governance, leadership, academic and pastoral standards and safeguarding.	Consistent feedback from ISC associations and BISAG members	Establish an international safeguarding standard adaptive to local contexts; increase the number of schools with internationally recognised accreditation schemes.	1 & 3
The international market for overseas pupils is increasingly competitive.	UK independent schools recruiting overseas pupils	Further decline in overseas pupils studying at UK based schools.	12% decline in overseas pupil numbers over last two years. (ISC Census)	Sector to conduct a review of the end-to-end international pupil experience, including costs incl VAT, visas, marketing and family decision-making, to inform practical recommendations for sustaining the UK offer.	2 & 3
Awareness of British independent schools amongst overseas families.	UK independent schools recruiting overseas pupils	Further decline in overseas pupils studying at UK based schools.	12% decline in overseas pupil numbers over last two years. (ISC Census)	Sector bodies to provide campaign material and work with BIST, the British Council and other partners to promote the UK schools offer through appropriate international campaigns.	2 & 3

2. Future ambition

D. International Ambitions for the Sub-Sector

British independent schools already generate £3.16 billion annually for the UK economy through education exports and transnational education. The sector ambition, working in partnership with government and other delivery partners, is to increase this by £800 million, or 25%, by 2031. This action plan supports economic growth while strengthening the UK's soft power and cultural connections around the world.

The goal is sustainable growth in the number of International British schools and overseas campuses, building on the sector's reputation for quality and global demand for British-style education. Growth must be underpinned by a continued focus on high standards in governance, academic achievement and pastoral care.

For overseas pupils coming to study in the UK, the aim is to return pupil numbers to a positive trajectory by strengthening the UK's international offer and supporting sector-led recruitment activity.

Priority area	Target	Baseline (2026)	By 2031	Value
Overseas campuses	Grow campus numbers	134 campuses (ISC Census 2026)	200 campuses	£660m (TNE)
International British schools	Grow school numbers	4,306 schools (ISC Research)	4,650 schools	Expenditure on education products
Overseas pupils	Increase overseas pupil numbers	22,941 pupils (Overseas pupils, parents overseas, ISC Census 2026)	25,500 pupils	£115m (education exports)

Notes:

- Estimated each overseas campus generates £15m in export value (primarily licensing fees)
- There is no current data set on expenditure by international British schools on British educational products and services – so no estimate can be provided. Currently 61% of British curriculum schools surveyed by BESA purchased products from UK suppliers.
- Education export value for overseas pupils based on average boarding fee of £44,940 per annum in ISC Census 2026

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.	Building on demand for British-style education by sustainably growing the number of international British schools, and overseas campuses operated by UK independent schools. These schools have a footprint across the world and meet demand for high-quality education from the local population and often domestic governments. In many countries strengthening education is part of broader economic development. Schools provide the UK government with a clear and respected offer on education when working with government partners overseas.
Continue to sustainably recruit high-quality international students from a diverse range of countries.	Recruiting international pupils to UK independent schools generating economic value and supporting cultural connections and soft power. An additional 2,500 pupils would generate £115m in export value. Many international pupils who come to study at a UK independent school will go on to enrol at UK universities.
Collectively grow education exports to £40 billion per year by 2030.	Growing the value of schools-related export revenue by £800m, or 25%, between 2026 and 2031 would increase annual export value from £3.16bn to £3.96bn. This is underpinned by indicative targets of 200 overseas campuses, 4,650 international British schools and 25,500 overseas pupils.

E. International Markets

Identifying markets for growing overseas campuses or international British schools is dependent on the strength of local demand for British education. This is determined by factors including the quality of the existing local school system, a growing middle class and the size of the school age population. The nature of the local market in terms of regulations, curriculum requirements, the ability to find the right local partners as well as the propensity of the host government to look to the UK for solutions are also key factors.

There is an opportunity to work closely with the UK's International Education Champion, and in coordination with other education sub-sectors, especially in priority markets including India, Indonesia, Nigeria, Saudi Arabia and Vietnam, to maximise the potential of overseas missions and government-to-government dialogue. The sector may also identify further emerging markets where targeted missions could complement this focus.

Historically, campus growth has centred on China and the UAE. Future growth is likely to combine continued activity in established markets with a broader pipeline across emerging opportunities.

Regional opportunities in the Far East will remain in Thailand, Malaysia and Vietnam. Indonesia may offer niche opportunities. In the Middle East Saudi Arabia remains a growth area with their Vision 2030 programme. Nigeria is also a proven growth market. Charterhouse Lagos opened in September 2024 with other projects following. On the current trajectory, around six British independent-school campuses could be operating by 2030.

There are now a broader range of schools looking at international opportunities with more mid-size schools looking to enter the overseas campus market. This may facilitate expansion in markets such as India where fees are lower than more traditional parts of the market. The ISC Census 2026 recorded 84 schools saying they did not currently operate an overseas campus but were interested in doing so.

There is also an opportunity to support countries on SEND education where the Middle East is a potential growth area, for example Saudi Arabia and Egypt.

F. Sub-Sector Actions

#	IES Ambition	Proposed Action	Suggested Lead	Timeline QTR & Year	KPI / Measure	Key Dependencies
1	1, 2 & 3	Establish a targeted network of School Export Champions, initially in selected IES priority and high-growth markets. Champions would identify credible investors and partners, provide commercial intelligence on upcoming opportunities, support schools entering new markets and follow-up until opportunities convert into UK exports through pupil recruitment, partnerships, consultancy and overseas campuses. <i>(Based on successful collaboration between BIST and school export champion in Nigeria (case study))</i>	ISC to make case and identify candidates	Establish network Q4 2027	Network established; schools mentored and market opportunities progressed.	BIST engagement; identification of candidates
2	1 & 3	Produce 'how to guide' for UK schools entering the overseas market, as well as case studies of schools already operating successfully overseas	ISC	Q2 2027	Guide and case studies produced and available to schools and sector associations	Sector input
3	1, 2 & 3	Targeted education trade missions into priority growth markets, working closely with the International Education Champion and other education sub-sectors to maximise the potential of missions.	Sector bodies	Ongoing	Trade missions delivered in priority markets.	BIST partnership; market prioritisation
4	1, 2 & 3	UK International Education Champion briefed on school issues ahead of relevant visits/meetings	ISC, its members associations and BISAG	Ongoing	Regular conversations between ISC and International Education Champion. Starting with a briefing meeting in early autumn 2026	Building relationship between ISC and International Education Champion
5	1 & 3	Produce handbooks on local regulatory systems in target countries for school expansion	School export champions (when appointed)	Ongoing from 2028 onwards	Handbooks produced for target countries.	Local market expertise. Engagement with BIST and FCDO's overseas networks
6	1 & 3	Strategic engagement between BISAG and HMG in-country when promoting British education.	BISAG	Ongoing	Improved co-ordination between BISAG associations and government	Strengthening relationship/dialogue between BISAG and government officials

#	IES Ambition	Proposed Action	Suggested Lead	Timeline QTR & Year	KPI / Measure	Key Dependencies
7	1 & 3	Establish an international safeguarding standard (adaptive to local contexts) for international British schools and overseas campuses.	BISSC	2027	Standard established and adopted by schools	Adoption of standard by schools
8	1 & 3	ISC to work with Nasen to develop proposals for supporting schools to export SEND	ISC/Nasen	2027	Workflows agreed	Co-ordination of activity
9	Ambitions 1 & 3	Expansion of QTS, iQTS and AO routes in accredited international British schools	ISC members	2030	Routes expanded.	DfE delivery
10	Ambitions 1, 2 & 3	Development of a coordinated "British Education Journey" framework from Early Years through to postgraduate study.	ESAG	2028	Framework produced.	Co-ordination between different parts of education sector.
11	Ambitions 1 & 3	Develop programme to increase value of UK educational products purchased by international British schools. Consider how best to collect data on school expenditure.	BISAG with BESA	2027	Programme developed; increased participation of UK suppliers.	BISAG and BESA collaboration
12	Ambitions 1 & 3	BISAG to actively promote internationally recognised accreditation pathways.	BISAG	Ongoing	More overseas schools having internationally recognised accreditation	Promotion of routes by BISAG
13	Ambitions 2 & 3	Produce evidence on the factors affecting overseas pupil demand for UK independent schools, including the overall cost of study, VAT impact on school fees on overseas pupils and family decision-making.	ISC/BAISIS	2027	Research produced	Further data on pupil numbers
14	Ambitions 2 & 3	International student competitiveness review - of the end-to-end experience for overseas pupils.	ISC/BAISIS	2027	Research produced	Availability of evidence
15	Ambitions 2 & 3	Restore public access to aggregated child student visa data for pupils studying at UK independent schools, where available, to support sector market intelligence on recruitment trends.	BAISIS	2028	Access granted	BAISIS to develop an evidence-based case for access to aggregated schools-relevant visa data, working with ISC and engaging the Home Office as appropriate.
16	Ambitions 2 & 3	Promote UK schools through coordinated sector, government and British Council campaign activity, with sector bodies providing campaign material and welcoming messaging that reinforces positive perceptions of a UK education.	Sector bodies	TBC	Campaign activity delivered. Messaging resonates with overseas audiences.	Campaign coordination BIST
17	Ambitions 2 & 3	Education trade missions to include UK boarding school recruitment events	Sector bodies	Immediate	Dedicated recruitment events included in missions.	Trade mission planning, BIST

G. Delivery Enablers

Delivery Enabler	How It Supports Delivery	Who Can Access / Use It	What More Is Needed	Link to IES Ambition
School export champions	Support schools and provide the continuity needed to convert government engagement into commercial delivery.	UK schools seeking to enter overseas markets	ISC to make case to BIST and identify candidates.	International standing; Grow exports
How-to guide and case studies for overseas market entry	Provide practical guidance to schools entering overseas markets.	UK schools	ISC sector input and evidence.	Grow exports
Local regulatory handbooks	Help schools understand and navigate local regulatory systems.	Schools considering overseas delivery	Local market expertise. Engagement with BIST and FCDO's overseas networks	International standing; Grow exports
Targeted education trade missions	Create direct market opportunities and strengthen relationships.	Schools and sector bodies	Coordination with BIST and market prioritisation.	International standing; Grow exports
International safeguarding standard	Support consistent quality and safeguarding while adapting to local contexts.	International British schools and overseas campuses	BISSC, DfE and other agencies.	International standing
UK supplier participation programme	Increase opportunities for UK educational suppliers in international school markets.	UK suppliers and international British schools	BISAG and BESA coordination.	Grow exports
Market intelligence and visa data	Support understanding of recruitment markets and international demand.	Schools and sector bodies	BAISIS to develop an evidence-based case for access to aggregated schools-relevant visa data, working with ISC and engaging the Home Office as appropriate.	Sustainable recruitment
Coordinated promotion	Sector bodies to provide campaign material and work with BIST, the British Council and other partners to promote the UK schools offer through appropriate international campaigns.	Schools and sector bodies	Campaign coordination and sector materials.	Sustainable recruitment

H. Delivery Partners

Delivery Partner / Group	Role in Delivery	Actions They Support	Engagement Approach	Dependencies / Risks
Independent Schools Council (ISC)	Coordinate delivery through an international education working group.	Overall SAP delivery	Establish International education working group (ISC member associations and BISAG associations) to drive implementation.	Capacity and coordination across member associations
British International Schools Group (BISAG)	Coordinate international British schools' activity.	Market engagement; UK supplier programme; accreditation	BISAG to work with ISC and relevant bodies.	Coordination across associations
British International Schools Safeguarding Coalition (BISSC)	Lead development of an international safeguarding standard.	Safeguarding standard	BISSC to work with ISC/BISAG	Need to adapt standard to local contexts

BAISIS	Support work on overseas pupil recruitment and competitiveness.	Evidence on factors such as VAT impacting overseas pupil demand; international pupil competitiveness review	BAISIS to work with ISC and relevant bodies	Access to evidence and market intelligence
BESA	Support increased participation of UK suppliers in international school markets.	UK supplier programme	BESA to work with BISAG associations	Market participation evidence
Nasen	Coordinating SEND work	Developing proposals for growing SEND exports	ISC to work with Nasen	Alignment of market activity and sector expertise
DfE	Support QTS, iQTS and AO routes and safeguarding work.	QTS/iQTS/AO expansion	Sector engagement and delivery coordination	Cross-agency coordination
BIST	Work in partnership with sector bodies on local market activity and promotion.	Trade missions; market engagement; campaigns	Sector bodies to coordinate activity with BIST	Alignment of market activity and sector expertise
FCDO	Work in partnership with sector bodies on local regulatory barriers, market activity and promotion.	Overcoming local regulatory market access barriers and supporting market activity and promotion.	Sector bodies to coordinate with FCDO Embassies and High Commissions	Identification of key regulatory barriers by sector

I. Progress Reporting to ESAG

KPI / Measure	Reporting Point / Date	What Success Looks Like	Target / Milestone	Evidence Source	Reporting Owner
Increase number of overseas campuses	May each year	Increase in numbers	200 campuses by 2031 (currently 134)	ISC Census (published in May each year)	ISC
Increase number of international British schools	December each year	Increase in numbers	4,650 schools (currently 4,306)	ISC Research	ISC
Increase number of overseas pupils studying at UK independent schools	May each year	Increase in numbers	25,500 pupils by 2031 (currently 22,941)	ISC Census (published in May each year)	ISC

ISC will establish an international education working group to drive delivery. The group will assign sector leads, monitor implementation and report progress to ESAG. It will include ISC member associations and BISAG associations.