



UK ELT

Sector Action Plan

(2026 – 2030)

Supporting the International
Education Strategy

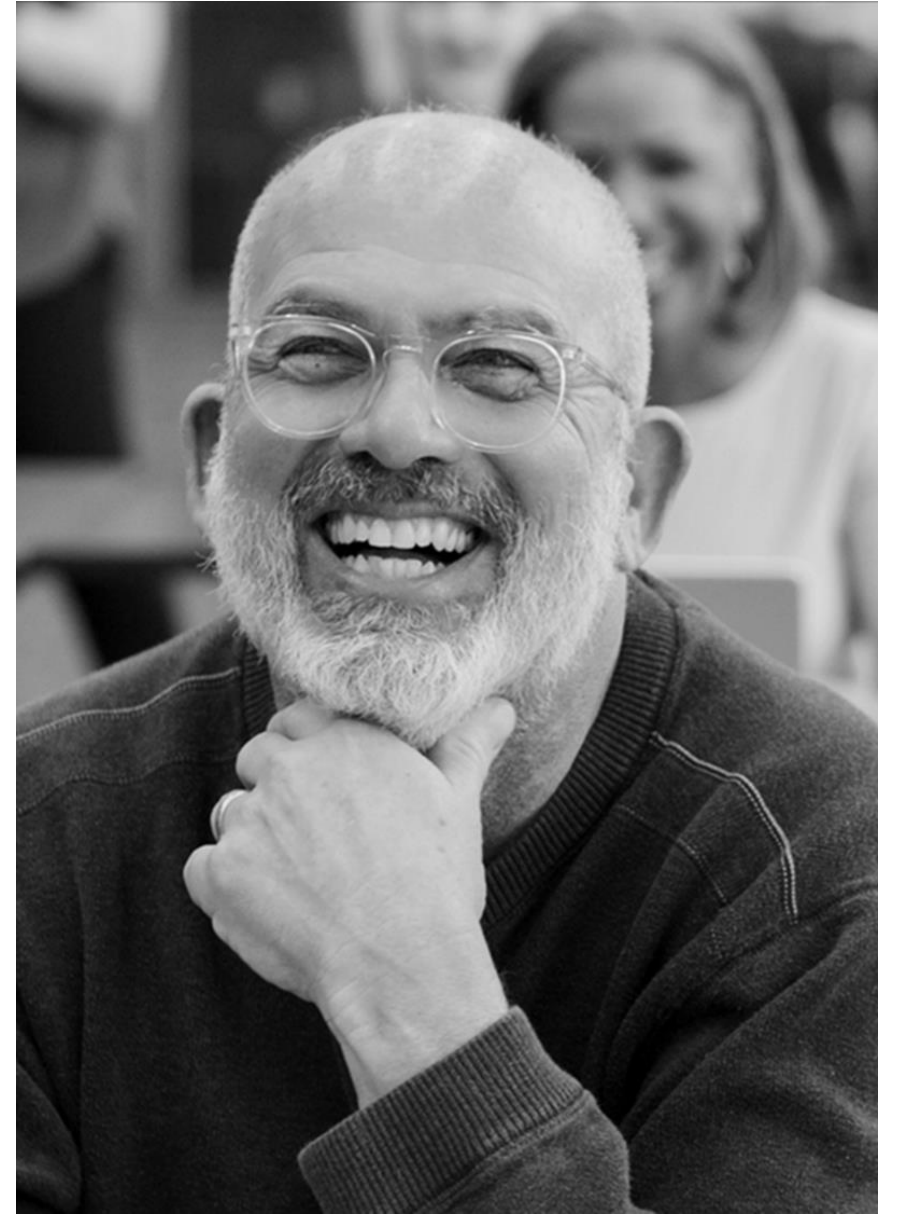
Purpose of this plan

- Sets out UK ELT's contribution to the IES
- Identifies priorities, risks, support needed
- Establishes a framework for coordinated delivery



Alignment with IES ambitions

- Contributes to global standing and strengthens soft power
- Supports diversified, sustainable recruitment
- Drives educational export growth directly and as a pipeline to the wider UK international education ecosystem



Ambition 1: global standing

- Promote quality and safeguarding
- Expand global partnerships with ministries of education, schools, universities and teacher training providers
- Increase visibility of UK expertise
- Strengthen soft power through people-to-people connections

Ambition 2: sustainable recruitment

- Act as a pipeline into the wider UK international education sector
- Diversify beyond key markets
- Develop pre-sessional and pathway partnerships supporting academic readiness
- Improve progression routes

Ambition 3: export growth

- Grow inbound students and spend
- Expand online, hybrid and TNE delivery
- Export teaching expertise
- Strengthen commercial partnerships with overseas institutions and governments
- Support regional economic growth across the UK

Current strengths and pressures

Strengths

- Global reputation for quality
- Students from 100+ countries
- Diverse provider base
- Strong progression potential

Pressures

- Rising global competition
- Visa perception challenges
- Increasing costs
- Accommodation and workforce constraints



Strategic vision to 2030

- Global ELT leader
- Sustainable and diversified growth
- Expanded transnational and digital delivery
- Stronger progression pathways
- Increased regional economic contribution
- Improved resilience against geopolitical and market shocks



Milestones

2026 - 2027: Stabilisation and alignment

2027 - 2028: Growth and diversification

2028 - 2029: Partnership and integration

2029 - 2030: Sustainable leadership and export growth



2026 - 2027: Stabilisation and strategic alignment (key priorities)

- Stabilise post-pandemic recovery
- Improve government-sector coordination
- Develop stronger progression data
- Expand international promotion of UK quality
- Improve sector-wide data collection and reporting
- Strengthen visa and policy messaging internationally

2026 - 2027: Stabilisation and strategic alignment (expected outcomes)

- Improved international confidence in UK ELT
- Greater policy coherence across government
- Improved visibility of sector contribution
- Increased collaboration across UK education sectors

2028 - 2029: International partnerships and system integration (key priorities)

- Deepen strategic partnerships with governments and institutions
- Develop long-term market development programmes
- Strengthen alignment between ELT, HE, FE and schools sectors
- Increase UK participation in international teacher development

2028 - 2029: International partnerships and system integration (expected outcomes)

- Stronger international influence
- Increased partnership-led recruitment
- Greater integration across the UK education offer
- Increased contract and institutional partnership activity

2029 - 2030: Sustainable leadership and export growth (key priorities)

- Consolidate UK global leadership position
- Demonstrate measurable contribution to education exports
- Scale successful market development models
- Embed long-term sustainable growth structures

2029 - 2030: Sustainable leadership and export growth (expected outcomes)

- Stronger and more diversified student recruitment
- Increased education export value
- Increased UK soft power impact
- Sustainable growth across regions and provider types

Priority markets



Established markets (GCC,
Japan, Korea)



Emerging (India, SE Asia,
Central Asia)



Latin America
growth



European
recovery

Delivery enablers and partners

- Government support (DBT, HO, DfE, FCDO, BC, VB)
- English UK & Accreditation UK
- International stakeholders (MoEs, scholarship bodies, schools & universities, agents, corporate and institutional partners)
- Digital capability
- Wider UK education partners
- Local and regional partners

Delivery barriers

- Visa uncertainty
- Increasing international competition
- Rising operational costs
- Accommodation constraints
- Workforce recruitment and retention
- Data gaps
- Geopolitical risk

Measures of success

- Student recruitment and reach (total enrolments, student weeks, number of source markets, UK regional distribution)
- Quality and learner outcomes (student satisfaction, accreditation outcomes, safeguarding compliance, student progression)
- Economic contribution (export revenue, local impact, indirect spend)
- Partnership and influence (number of institutional partnerships, teach training, government partnerships, progression)
- Strategic resilience (market diversification, growth in online and hybrid, SME participation)

