

MARKET INTELLIGENCE

Stay up-to-date with quarterly round-ups of key trends in education, written by the Oriel Square research team.

IN-DEPTH FEATURES

Hear from innovators in education, including teachers, school leaders, researchers, thought leaders, charitable organisations, think tanks and providers.

THE SCHOOL PERSPECTIVE

Get on-the-ground insights and experiences from classroom teachers, subject specialists, and school and school group leaders.

Education Insights



from

ORIEL
SQUARE

Trusted market insight for education organisations



“The team are expert and knowledgeable; always ready to collaborate and share their insights with others.”

Karen Wespieser
COO, TeacherTapp

TASTER ISSUE

Education Insights from Oriel Square: Quarterly Reports on the Schools Education Market

Everyone who produces content or provides services for teachers, learners and others involved in education wants to make a difference by delivering the most effective support possible. Through our work with a broad range of education stakeholders, we saw that there was an appetite for clear insights about what's happening now and what might be on the horizon in the industry. With our in-house team of education specialists, our expertise in research and publishing, and our broad network of industry and school stakeholders, we knew we were well-placed to deliver those insights.

Now in its tenth edition, Education Insights reports are packed with critical market intelligence, in-depth features, and insights from educators and industry experts. Our content is carefully curated to fuel strategic thinking in your organisation and help you make informed decisions.

Helping you stay abreast of the most pressing developments, our latest and upcoming reports focus on:

- what's happening behind the scenes of curriculum and assessment change in England
- subject and phase deep dives into changes, trends and innovations
- growth in key markets and sectors.

From selecting the most relevant feature topics, to interviewing guest contributors, to bringing a fully-designed report together, it's a pleasure to see our work benefitting subscribers, and to be able to showcase what we do in this space.

Trusted by the world's most successful education organisations, our community of subscribers includes many of the major players in UK educational publishing and assessment, as well as growing EdTechs and consultancies. Join the community to start identifying benefits from new developments in education.

Scan to find out more
and subscribe.

Subscribe at www.orielsquare.co.uk/education-insights-subscription.



Events

Education Insights events explore further insights and developments from our feature topics through live discussions and Q&A with our contributors. These themed events bring the Education Insights community together for networking and knowledge sharing, both in-person and online.

Pricing

An Education Insights subscription includes:

- Quarterly reports focusing on trends in the education market, sent directly to your email or shared with your team (pdf). That's four reports per subscription year.
- Unlimited access to our back catalogue.
- Exclusive access to Education Insights events.

Freelancer	Small organisation	Large organisation	Corporate
per annum	per annum	per annum	per annum
£300 +VAT	£550 +VAT	£825 +VAT	£1150 +VAT
Individuals only	Up to 25 employees	Up to 100 employees	More than 100 employees

Our background

We work with leading educational organisations in the UK and internationally, including Cambridge Partnership for Education, Oxford University Press and Collins, providing research, strategy, thought leadership and publishing services.



Left: Thought leadership for Oxford University Press; Middle: Publishing services (Happy Handwriting resources) for Collins; Right: Thought leadership for Cambridge University Press and Assessment.

To bring the expertise of the Education Insights team to your organisation, contact us about bespoke research, communications and publishing services for education at www.orielsquare.co.uk/contact-us.

Scan the QR
code to find
out more about
our work



Directors' Foreword

We're proud that Oriel Square is part of the Department for Business and Trade Export Pavilion at BETT 2026, the world's biggest EdTech event, and we look forward to consulting with both UK and international organisations to help them access British and British international education markets. BETT UK provides a meeting place for those of us involved in developing educational products and services around the world. The great privilege of being part of the UK education industry is to be able to support teaching and learning globally, whether through working with ministries of education and international schools, or through the distribution of great UK-developed products.

Showcasing our in-house expertise across research, communications and production, this special taster issue of our Education Insights reports brings together contributions from our previous nine editions, looking at topics from SEND, to phonics, to digital skills. We hope you find it useful, and look forward to having further conversations about how to design, develop and distribute the most impactful educational resources.

Sam Derby and John Deans, Directors at Oriel Square, January 2026



Work with ORIEL SQUARE

Your partners for UK and international publishing expertise.

Oriel Square is a trusted partner to the most successful education organisations in the world. We provide market entry consultancy, market surveys, research and communications, product research and development, and custom publishing and adaptation services.

We work with major UK and international publishers, ministries of education and their agencies, EdTech suppliers, charities, and professional organisations.



Contact us for a free initial consultation by scanning the QR code.

Education Insights 

Quarterly reports on the schools education market:

TRUSTED EDUCATION MARKET INSIGHT

Don't lose sight of the big picture. Start identifying benefits from new developments in education.



Scan to find out more and subscribe.



The Impact of Oracy

Voice 21's Amanda Moorghen tells us about the advantages of an oracy-rich curriculum.

"Oracy has helped me so much – it's the best thing to help with your confidence and expressing your feelings" – **Jack, year 5**.

Every child should feel like Jack during their education. Oracy enables children to be heard which is vital for their learning, confidence and mental wellbeing. It is essential preparation for young people to take their place in democratic and civic life.

So, what is oracy?

The Oracy Education Commission defines oracy as 'articulating ideas, developing understanding and engaging with others through speaking, listening and communication'. In oracy-rich schools you will hear students solving problems collaboratively in maths and dissecting arguments in history, talking through conflicts in the playground and leading assemblies.

The impact of oracy at school

When we're teaching and learning, we're speaking and listening. Oracy comprises a body of knowledge and a skillset to be taught, and a crucial medium through which children access their learning. Students make their thinking visible to their teacher and their peers through talk, enabling deeper learning engagement.

There is strong evidence for the link between oracy and students' academic attainment. The Education Endowment Foundation (EEF) found that 'oral language interventions' have 'very high impact [6+ months' progress] for very low cost'. A recent trial of dialogic teaching (a pedagogical approach that focuses on the quality of talk for learning) found that it has a consistent, positive effect on the attainment of students across English, maths and science. An analysis of classroom talk found that features of a high-quality oracy education (elaboration, querying and student participation) are positively associated with students' SATs performance.

Students make their thinking visible to their teacher and their peers through talk, enabling deeper learning engagement.

Insights from Voice 21 Oracy Schools

Voice 21 is working in over 1000 schools, including 44 accredited Oracy Centres of Excellence. Our schools are demonstrating that embedding oracy education in every element of school life is the future: it enhances children's learning, attainment, confidence, wellbeing and sense of community. Every child feels their voice has value and is empowered to use it to thrive.

Our latest impact report revealed that Summerhill Academy, Bristol, has made a huge improvement in maths. Explicitly teaching students to engage in high-quality, collaborative problem-solving through talk has resulted in 95% of students achieving or exceeding the expected standard in maths SATs, an increase of 25 percentage points on the previous year.

Teacher-led research in our schools shows that teaching oracy explicitly – supporting students to extend their own and others' thinking through discussion by bringing oracy-rich approaches to the teaching of vocabulary – rapidly delivers measurable results for teachers who are monitoring students' analytic writing.

Amanda Moorghen is Head of Learning, Impact and Policy at Voice 21. She joined Voice 21 in 2019, supporting the development of the organisation's whole-school approach to oracy education, which launched in September 2020 and now reaches over 1000 schools across the UK.



¹ Oracy Education Commission, 'We Need to Talk' (2024)

² <https://educationendowmentfoundation.org.uk/education-evidence/teaching-learning-toolkit/oral-language-interventions>

³ <https://educationendowmentfoundation.org.uk/projects-and-evaluation/projects/dialogic-teaching>

⁴ <https://www.educ.cam.ac.uk/research/programmes/classroomdialogue/>

A Calm, Purposeful Environment: Trust-Wide Approaches to Inclusion

River Learning Trust's Director of Inclusion spoke to Hannie Kirkham about developing provision that enables all learners to achieve.

Q: What are your goals for SEND education and inclusion at RLT?

Our overarching goal is to ensure that all children and young people have access to an education that provides them with the knowledge and skills that will support their successful transition to adulthood. The transition to adulthood cannot be left to secondary or further education – to change long-term outcomes for pupils with SEND, we need to be intervening from the earliest years.

Q: What do you like to see when you walk around your schools?

I want to see a calm, purposeful environment with all children and young people engaged in their learning. To better meet the needs of pupils with SEND, we need to be empowering teachers – their pupil observations help identify barriers to learning, which we can then support them to remove.

SEND provision can often focus on labels, like autism or ADHD, but a diagnostic label is only a starting point as every child is unique. That said, there are commonalities in barriers to learning across different diagnoses. For example, pupils with a variety of learning needs may struggle with working memory. If a teacher considers how they address this, they can strategically meet the needs of more pupils through standard classroom practice.

Q: What practices have you found successful for promoting inclusion in your schools?

Our primary focus is that classrooms are inclusive and teachers employ strategies that enable pupils with SEND to learn alongside their peers. There are, however, national challenges schools are facing, such as the lack of places in specialist schools. At RLT we are not content waiting until a place in a special school becomes available – we need to support the child now, in their current setting. We are innovating in this area, finding ways to better deploy funding to ensure all pupils have the best possible provision, independent of their starting points.

Q: What are the advantages of a trust-wide approach to SEND provision?

At RLT we champion that every teacher is a teacher of SEND, and every leader is a leader of SEND. To have this realised, we need to be sure that everyone understands their role and responsibilities in meeting the needs of pupils with SEND. To enable this trust-wide understanding, I work with all staff – headteachers and senior leaders, SENDCos, curriculum and pastoral leads, teachers and TAs. Our aim is to enable more children and young people to attend – and have their needs met – at their local community school.

Q: How can the wider education industry better help schools to support SEND learners?

Nationally, we need to change the narrative around SEND. The wider education industry can support this by providing guidance and support for teachers that empowers them in their role. Everyone is aware of the challenges relating to SEND provision nationally – no one more so than the children, their families and school staff. The focus needs to be on what we can do to give pupils with SEND the best possible outcomes.

Q: What change would you like to see?

To change long-term outcomes, society needs to be more inclusive. We need to be thinking in terms of individuals' strengths as opposed to differences, and we need to be identifying meaningful ways for children and adults with SEND to engage in society, for example through employment, sport or community events.

Katherine Walsh is Director of Inclusion for River Learning Trust (RLT). An experienced teacher and school leader, Katherine has expertise in developing school-wide systems and establishing inclusive SEND provision. She was a lead author on the DfE-commissioned 'Whole School SEND Teacher Handbook' and a project director for the Education Endowment Foundation's SEND Review Trial.

Recommendations from the Black Curriculum

Lavinya Stennett shares the Black Curriculum's response to England's interim Curriculum and Assessment Review report.*

The Black Curriculum works collaboratively to develop ideas, recommendations and frameworks for embedding Black British history, culture and contributions into all subjects and key stages.

History and geography

There are many opportunities across the curriculum to embed the teaching of Black British history:

- **Key stage 1:** People and Places – investigating local area and family histories
- **Key stage 2:** Migration – exploring the question 'who are we as Britons?'
- **Key stage 3:** Multicultural Britain – discovering why British society looks the way it does today
- **Key stage 4:** The Global Community – connecting previous topics on a global scale.

For key stage 1 history this means studying events within living memory (Windrush Day; Stephen Lawrence Day), and discussing figures beyond Mary Seacole (Tony O'Connor, Yvonne Connolly and Betty Campbell to name but a few). It is also important for young people to learn about significant Black Britons and events within their own communities. Key stage 2 opportunities include studying Black presence in the Roman Empire, and considering Anglo-Saxons and Vikings as invaders and colonisers. When studying Ancient Egypt, it's too easy to gloss over the fact that one of the earliest civilisations was African. We also recommend studying a non-Western society as a contrast to Britain, such as Baghdad c.AD 900, the Mayan civilization c.AD 900 or Benin c.AD 900-1300.

At key stage 4, pedagogical approaches should emphasise culturally responsive teaching, and the co-production of knowledge by drawing on local resources and people. There are cross-curricular links with geography, RE, PSHE, English and drama.

Geography recommendations include studying local diverse histories at key stage 1 and linking locational

knowledge to Commonwealth regions and British colonialism. Human geography lessons could explore migration and colonial links, and consider cultural practices that are similar across the world such as carnivals in Brazil, London and the Caribbean. Climate disaster coverage could look at which communities are most affected. Assessment could include local fieldwork, significant places and 'living geographies' by creating local guide books.

Science and maths

Black British history permeates science as well. Students can study and be inspired by Black scientists like Lewis Latimer and Dr. Maggie Aderin-Pocock, and the work of the Hidden Figures in NASA. In maths there is scope to compare the Hindu-Arabic numeral system with Roman numerals, and appraise prominent mathematicians like Nira Chamberlain and Katherine Johnson.

Art and citizenship

There is opportunity in art and design to study local Black artists, and fashion as protest.

There are many possible topics in citizenship to cover Black British history: Sustainable Development, centring on activists outside Europe/North America, Global Citizenship (migration, community), Media and Society (representation, Black media figures), and Law and legal systems (case studies like Stephen Lawrence, the Mangrove 9, SUS Laws, BLM).

Teaching could also look at international political organisations, multi-culturalism (with case studies like Windrush and the Black British presence across history), human rights, active citizenship and politics, including case studies of Black politicians and the rise of the far right.

Lavinya Stennett is a social entrepreneur, author and Founder/CEO of the Black Curriculum.



How has Phonics Teaching Evolved in Different English-Speaking Contexts?

The origins of teaching reading using synthetic phonics can be traced back centuries. This timeline focuses on significant research and events in three major anglophone markets across the last two decades to contextualise the phonics teaching in schools today. In both the United States of America and Australia, individual states have freedoms to implement education policies under federal governmental systems, while in the UK, education policy falls under the control of central government and the Department for Education.

England and Wales	2005	2006	2007	2010	2012	2012	2013	2014	2016	2018	2024
	Publication of Clackmannshire research study (Johnson and Watson) which gave strong evidence for the efficacy of synthetic phonics – though not the first study into the subject, it had a major impact on policy and contemporary thought	Rose Report ¹	Government publishes <i>Letters and Sounds</i> – guidance for effective phonics teaching	Change of government; Nick Gibb, new schools minister, is very positive about phonics as a method for teaching reading	Government announces 'matched funding' on phonics resources of up to £3,000	Pilot of the Phonics Screening Check (PSC) at the end of year 1; 32% of children met the expected standard	PSC rolled out nationally; pass-rate went up to 59%; currently around 80%	New National Curriculum; phonic knowledge should be taught as the only method for decoding words	DfE sponsors phonics 'roadshows'	Launch of Early English Hub schools – supporting neighbouring schools to improve teaching of phonics, early language and early reading	Curriculum and Assessment Review launched; 80% of pupils meet the expected standard in the phonics screening check in year 1 ²
USA	1997	2000	2006	2013	2017	2019	2023	2023			
	Congress convenes the National Reading Panel (NRP) to challenge poor reading standards across the country	Publication of <i>Teaching Children How to Read</i> , advocating systematic phonics instruction for all students, based on findings from NRP	Publication of second edition of <i>Teaching Phonics for Balanced Reading</i> by E. V. Starrett, to help teachers plan lessons	Mississippi adopts a phonics scheme in its schools and rises from 49th place in USA reading scores to 29th in reading scores by 2018	The use of phonics to teach reading becomes known as the Science of Reading, popularised by the work of journalist Emily Hanford, host of <i>Sold a Story</i>	Individual states begin to introduce legislative steps to reform the teaching of reading – by 2023, 45 states and Washington DC had introduced at least one bill ³	New York City orders elementary schools to adopt one of three phonics-based reading schemes	Publication of <i>Reading Reform Across America: A Survey of State Legislation</i> (Albert Shanker Institute), analysing the effectiveness of more than 200 bills			
Australia	2004	2005	2017	2018	2020	2021	2022	2023	2024		
	Brendan Nelson, the Minister for Education, Science and Training, establishes a National Inquiry into the Teaching of Literacy in Australia	The Australian Government participates in a major study on literacy teaching, culminating with the publication of a report entitled <i>Teaching Reading</i>	South Australia becomes the first state to implement a phonics screening check for year 1 students	The State Government of Victoria published a Literacy Teaching Toolkit that included phonics	Australian government launches free year 1 phonics check	New South Wales adopts the phonics screening check for year 1 students	Tasmania adopts the phonics screening check for year 1 students	Victoria added a phonics screening check to its English Online Interview (EOI) and mandated the use of a second assessment in year 1	In Victoria, all students from prep to year 2 to be taught using a systematic synthetic phonics approach, with at least 25 minutes of daily explicit phonics teaching		

¹ Department for Education and Skills, 'Independent Review of the Teaching of Early Reading: Final Report' (2006)

² <https://explore-education-statistics.service.gov.uk/find-statistics/phonics-screening-check-attainment/2024-25>

³ <https://www.shankerinstitute.org/resource/reading-legislation-data-dashboard>

Digital Skills in the Curriculum: It's Not Just About Computer Science

*Peter Marshman, CEO of charity digit<all>, spoke to Hannie Kirkham about how teaching digital skills in schools could change for the better.**

Q: Which areas of the curriculum could better integrate digital skills?

Really, crosscurricular change is needed. Until now, we've relied heavily on the computing curriculum, which overemphasises coding, to cover digital skills. This means that if young people don't study computer science, they miss out on a lot of digital learning. Both the curriculum review and the increasing prevalence of AI have made people rethink the integration of digital skills in other subjects.

Q: Are there specific recommendations you would like to see from the C&A review?

I'd like to see a framework that supports every subject to embed digital skills meaningfully. Even in PE, recording and analysing performance is complementary learning, not shoehorning in digital skills.

Digit<all> works on climate literacy, AI literacy and digital literacy, which quite helpfully go together. I hope data science and machine learning and AI are weaved into any curriculum change in computing.

Q: What are the most important digital skills?

We must teach the ability to make critical judgments when using technology. With low-code and no-code options merging together, young people still need to understand how the programmes work because, if you don't, you can't be a discerning user. This involves what we call a notional machine level of understanding – for instance, understanding that the machine does X because it goes through these steps.

Q: Have there been any particularly effective or ineffective initiatives for digital skills over the last few decades?

Aside from the computing curriculum, the micro:bit has been really transformational. Its low cost means every school has it, and it allows students to code something physical and develop engineering skills. Computing can be seen as very sedentary, so the fact that you can code a device and then take it outside,

monitor conditions and look at animal habitats is a great way for young people to see how technology can interact with their physical environment.

Q: What about the future of assessment?

There are so many online platforms that make assessments fun and engaging. That's useful for formative assessment, and student use of AI for this is interesting – it's not necessarily bad. If a kid comes to a teacher and says 'Miss, I've done my poetry homework but I used AI to write the first line because I was really struggling with it...' then that's great. But it's important for teachers to understand how to support both their workload and, more importantly, their students with targeted guidance for AI assessment platforms.

Q: What recommendations would you give to the educational publishing industry?

Context is now more important than anything else. Publishers should link programming to the real world, always beginning with the 'why', because that's the hook for children now. Consider skills that employers are looking for that are not automatable. Publishers also need to understand the amount of time between the Review's decisions and its implementation; the last curriculum change took half a decade to go through. It takes time.

Peter Marshman is CEO of digit<all>, having worked with schools for over 15 years. He's also Secondary Computing Lead for Computing at School (CAS), an EU Code Week Ambassador and has worked with BCS, the BBC, Hodder Education, the Royal Society and more.

Digit<all> is a charity committed to advancing digital competency through strategic support and partnerships with schools. They host teacher training, workshops and enrichment camps with learners, and provide resources to support the inclusion of computing skills in schools and communities.



The Classroom Perspective

CLASSROOM EXPERT

At Education Insights, we want to hear from the people on the ground. Our reports regularly feature innovative educators from a range of school contexts. Here are some highlights of teacher insights from our previous issues.

Edd Moore, award-winning eco-coordinator and Oriel Square's Classroom Expert for Sustainability, discussed climate education.

"Since the publication of the DfE's Sustainability Strategy in 2022 there has been increasing urgency for schools to get children into, and learning from, nature. In my last primary school I embedded nature and the environment into the curriculum to inspire students. For example, sustainability can be woven across subjects in enquiry-based projects. We want learning to impact students' thinking and actions to enable them to focus on issues at the school, community or global level. These enquiries link with the natural cycles of the seasons and aim to open up a journey of meaningful exploration. The Harmony Project is a great example of a sustainability curriculum in practice. Building understanding and appreciation of the natural environment is the first step to nurturing a generation who actively want to care for their world."

Excerpt from *Education Insights: Issue 5, September 2024*

Karl Coutet, who taught in Saudi Arabia for over ten years in both US and British curriculum schools, characterised the international education market in the region.

"The region is the second fastest growing area for international schools after China. The growth is due to a move from international education being a provision for emigrants to one for the local market. Local parents want their children to have an international education but their objectives for this have changed. They previously wanted their children to secure entrance to universities abroad, but increasingly students are staying more local: they might study abroad but intend to return to their home country afterwards. Schools are therefore required not just to prepare students for Higher Education but for life in a more global market. This means they must model their provision in a more sophisticated way to offer students an international education while still maintaining their home language and culture. It might be too much to ask a publisher to think beyond the standards they are following, but enrichment activities that support the local context would add a lot of value to international curricula."

Excerpt from *Education Insights: Issue 2, October 2023*

Imogen Melton, learning support assistant in an SEMH specialist school in the North East, explained how she created appropriate literacy resources for her students with SEND.

"A lot of resources I created from scratch, and I always made three versions at varying difficulty levels, so that I could ensure I had something suitable for every student. We had a school subscription to Twinkl, so sometimes I could use material from there as a starting point, but it would usually need to be heavily edited to suit our context – even the SEND-specific content. The main difficulty was that, even if an activity provided the correct learning content, it was often not designed for older children, so was not appropriate for many of our students. It was a challenge to make sure the resources I was using looked like they belonged in a secondary school. Often this involved changing fonts or reducing point size, and deleting images and illustrations aimed at very young children. We had to be careful not to demotivate our students by giving them learning materials they deemed as 'babyish'."

Excerpt from *Education Insights: Issue 7, March 2025*



"For their in-depth analyses of key trends backed up by solid and comprehensive data, I consult the Oriel Square Education Insights reports. I find the perspectives insightful and the data persuasive."

Jill Budgell, Educational Consultant

"They have a really detailed granular understanding of the education supplier market, and how that links in with policy, process and decision-making in the UK."

Head of Education Programme

Looking for more Education Insights?

Subscribe to our free weekly newsletter to stay up-to-date with key happenings in education.

We share all the weekly headlines in one easy-to-digest summary, covering policy, early years, primary, secondary, FE, adult, international and ELT.

Find out more and subscribe by scanning the QR code.

