Department for Education

Market Impact Assessment

Oak National Academy

September 2025

Contents

Executive Summary

Oak National Academy (hereby referred to as Oak) launched as a non-departmental public body (NDPB) providing free, online educational resources to schools in England in September 2022. The business case that supported the Department's decision to create this NDPB included a commitment to continually monitor its impact on the curriculum resources market.

This report presents the findings of the DfE's market impact assessment, to identify any evidence of impacts (both positive or negative) Oak has had on the market and its suppliers since its creation as an NDPB. The DfE has come to its conclusions based on desk-based research of the market impacts of Oak, along with engagement with commercial suppliers and teachers conducted by DfE in the 2024-25 autumn and winter period.

The findings of this report indicate that Oak has had a modest impact on the domestic curriculum resources market as it has likely impacted the investment decisions of commercial suppliers, leading to a reduction in investment in the domestic market. There has also been a contraction in the domestic market since Oak was established as an NDPB, although, it would be difficult to attribute this wholly to Oak due to other potential market influences as well as the fact that Oak's usage was mostly stable during this time. However, following the initial release of Oak's first cycle of new resources, usage has increased recently. The Department believes this increase is likely to have a greater impact on the market going forward.

In contrast, Oak has likely had a limited impact on the international market for commercial curriculum resources. Despite Oak's Open Government License, it has had very little expansion in international usage, whereas the international market for curriculum resources has seen relatively large growth since September 2022.

Finally, the DfE has considered the potential impact of Oak's AI lesson assistant (Aila). However, given that Aila was only launched in September 2024, it is difficult to accurately assess the market at this time as the tool is still in its infancy. The Department will continue to keep this under review.

Scope of this assessment

This report will assess the impact that Oak has had on the UK curriculum resources market and the wider education sector since it was launched as an NDPB providing free, online educational resources to schools in England in September 2022. This is in line with the Department's commitment to continually monitor market impact, as laid out in the business case that supported the Department's decision to create the NDPB.[1]

The aim of this report is to identify any evidence of impacts (both positive or negative) Oak has had on the commercial market for curriculum resources as well as on schools and teachers since the previous market impact assessment was carried out prior to Oak becoming an NDPB. To do this, it will a) provide an overview of recent trends in and a quantification of the UK commercial curriculum resources market, b) assess the actual or estimated impact of Oak on teachers and schools in the UK, and c) highlight the actual or estimated impact of Oak on other UK-based providers of curriculum resources in the commercial market. The findings of this assessment are supported by desk-based research of the market impacts of Oak, along with market engagement with commercial suppliers and teachers conducted by DfE in the 2024-25 autumn and winter period.

[1] DfE (2022). Oak National Academy business case - GOV.UK (www.gov.uk).

Overview of the curriculum resources market

Oak operates in the curriculum resources market. The supply of resources in this market can be broken down into three main categories: 1) those supplied commercially (i.e. paid-for curriculum resources, both digital and printed), 2) those created by teachers/schools/multi-academy trusts (MATs) for themselves and/or shared with other teachers, and 3) non-profit resources supplied by publicly funded organisations, such as Oak, as well as free resources provided by charitable organisations.

Commercial market

The UK commercial market, at present, is a fairly competitive market with a few large players such as <REDACTED>, and a large number of smaller "micro" companies.[2] It comprises traditional publishers of digital and printed schoolbooks such as <REDACTED>, digital platformers such as <REDACTED> as well as subject specialists such as <REDACTED>.

The resource offering provided by commercial suppliers varies across school phase and subject. There is a broad degree of product differentiation across the curriculum resources market with suppliers providing a range of resource types and coverage of the national curriculum. Furthermore, it appears that resource quality is a driving factor in competition with the market, as schools choose suppliers based on the perceived quality and suitability of resources supplied commercially. However, price is likely to also be an important consideration in teachers' and schools' decisions in the context of school budget constraints.

Quantifying the size of this market precisely is challenging, but the Department estimates the value of the UK commercial curriculum resources market to be around £190-£200m per annum. This may be an underestimate, as it may not fully account for additional market segments that are challenging to measure accurately. This DfE analysis used two measures to arrive at its estimation. Firstly, it used the data provided by the Publishers Association (PA) which reports that the total revenue in the domestic education market was <REDACTED> in 2023 (comprising <REDACTED> in revenue from printed and <REDACTED> from digital resources).[3] This figure had decreased from <REDACTED> in the previous year, representing a decrease in the domestic market of <REDACTED> between 2022 and 2023. This also followed a <REDACTED> decrease in value of the market between 2021 and 2022. Secondly, this analysis uses data from the British Educational Suppliers Association (BESA's) 2023 analysis of school-level expenditure on relevant categories of learning resources.[4] This provides a comparative estimate of the

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[2] Aston et al. (2022). The education technology market in England (publishing.service.gov.uk). p.45.

[3] Data provided by the Publishers Association during the DfE's market engagement on total net invoiced sales in education sector home market 2018-2023.

[4] Connor (2023). BESA 2023.

commercial market value in the same way as the Department's previous market impact assessment.[5] It estimates that the commercial market has a value of <REDACTED> in 2023, which represents a <REDACTED> decrease from the <REDACTED> figure estimated in 2022.[6] Unlike the PA figure, BESA's estimate only refers to school expenditure on curriculum resources and excludes parent/pupil expenditure, which is an additional and potentially significant segment of the market.

It appears, therefore, that there has been a decline in the size of the domestic market between 2021 and 2023, based on the latest available data.[7] This contrasts strongly with the sector's international performance. The export market for UK-based providers is larger than the domestic market (with a market value of £469m in 2023 according to the PA) and is also continuing to bounce back further from the pandemic with 7% growth experienced between 2022 and 2023.[8] This is considerably higher than the market value of <REDACTED> in 2020 during the pandemic: however, it remains slightly below the pre-pandemic value of <REDACTED> in 2019.[9]

Self-developed resources

A significant amount of curriculum resources used in schools is self-made by teachers and resources are often circulated within teacher networks. This sharing between teachers is predominantly carried out without expectation of payment, in a mutually supportive manner. However, in some cases, teacher-made resources may be shared commercially through platforms such as <REDACTED>. Additionally, some MATs produce their own resources and share these with their group of schools or more widely (sometimes commercialising them). Estimating the market value of this "hidden" market segment is challenging given its complex, informal and unrecorded nature.

Teacher panel survey data commissioned by Oak in October 2022 indicates that 53% of the resources used by teachers in their lessons were either self-created from scratch or created by teachers in the same school, whereas 45% came from "online platforms" or "paid-for curriculum packages".[10] However, the survey data does not differentiate between teachers who had developed their resources from scratch and teachers who had adapted existing material from commercial suppliers or been influenced by it.

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[5] Connor (2022). Resources in English maintained schools 2022 - BESA.

[6] <REDACTED>.

[7] The Publishers Association data for 2024 is to be released in Spring 2025, which they have stated during market engagement is expected to show a further decline in sales and revenues. However, this data was not available at the time of this market impact assessment.

[8] Publishers Association (2024). Publishing in 2023 - Publishers Association.

[9] Data provided by the Publishers Association during DfE market engagement on total net invoiced sales in education sector export market 2018-2023.

[10] Teacher survey conducted via SmartSurvey's teacher panel (2022). Provided by Oak National Academy for market impact assessment.

<REDACTED> survey results also suggest that teachers significantly contribute to the creation of the resources they use in the classroom. <REDACTED>.[11]

Given the evidence available, it is challenging to quantify the self-created market in monetary terms. This is because in most cases, as set out above, it cannot clearly be established whether resources have solely been created by teachers or MATs or whether they have, to a lesser or greater degree, drawn on existing commercially supplied resources. Furthermore, comparing the market value of resources created by teachers with those created by commercial suppliers is challenging because in most cases self-created resources are not sold and it is not possible to quantify their market value in that context.

Not-for-profit resources

The third market segment refers to the supply of non-profit resources. These are resources provided by publicly funded organisations, which includes Oak National Academy, as well as free resources from charitable organisations. The biggest player in this segment is BBC Education, comprising BBC Bitesize, BBC Teach, and Tiny Happy People. BBC Bitesize alone was reported to have on average 1.5m unique users per week in the 2023-24 financial year, the same figure as the previous year.[12] This demonstrates that the non-profit segment of the curriculum resources market is fairly substantial in size, albeit with fewer large providers than the commercial sector. Whilst these organisations do not operate in the commercial market, they would be classified as digital platform in the categorisation described above as they provide resources online across multiple subject areas. According to both usage data provided by Oak and online traffic data from "Similarweb", Oak would be considered a mid-range player in the sector compared to suppliers in the commercial market, with around 556,000 monthly online UK visitors between February and March 2025, compared to almost <REDACTED> for <REDACTED>, the current leader in the commercial market.[13]

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[11] <REDACTED>.
[12] BBC (2024). BBC Group Annual Report and Accounts 2023/24.
[13] Sum of all visits on desktop and mobile from the last month according to Similarweb, data correct as of 11/03/2025.

Impact on teachers and schools

Oak usage

Between Oak launching as an NDPB in September 2022 and January 2024, its usage declined slightly but overall remained stable. During this period Oak was transitioning from material developed at pace to support teachers and pupils during the pandemic. Some of Oak's curriculum partners decided to remove their content when the NDPB was established. The Department believes this limited the impact that Oak had on the commercial curriculum market during that period. Since January 2024 there has been a very significant increase in Oak usage, which correlates with Oak's development and release of new resources.

Steady Oak usage September 2022 to January 2024 and limited market impact

Oak usage data (Figure 1 below) provides a daily time series with usership values, representing a rolling measure of the number of users over the previous six months from the point of measurement. In September 2022, direct teacher usage ranged between 58,000 and 63,000 during the month, which accounts for the number of teachers using Oak products since March 2022.[14] It therefore includes data on Oak usage prior to September 2022, when Oak was established as an NDPB, but provides a baseline value which can be used to assess the impact that the intervention has had on usage. Figures for March 2023 show that direct teacher usage ranged between 60,000 to 64,000 users,[15] demonstrating that there was no significant change in Oak usage in the first six months since becoming an NDPB. The data shows that this trend continued with usage remaining steady until January 2024.

Oak's usage figures then increased sharply from January 2024, at the same time as the new and improved lesson resources which Oak was developing began to be rolled out in volume. Oak's lesson resources are being rolled out in two batches ("cycle one" and "cycle two"[16]). By the end of March 2024, Oak had released 50% of its cycle one lesson resources. It had released 100% of cycle one resources by September 2024. By the end of March 2025, Oak had released 30% of cycle two resources. Oak is due to release all of its cycle two resources (i.e. to have released all its resources across subjects in full) by

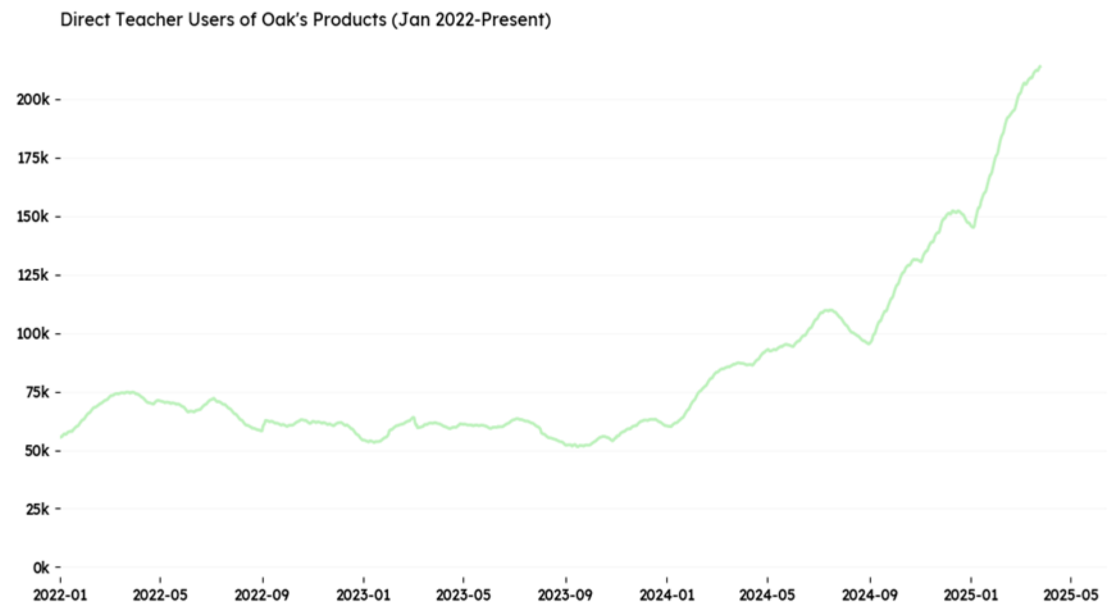
[14] Data provided by Oak National Academy for market impact assessment. Oak usage January 2022 to present.

[15] Data provided by Oak National Academy for market impact assessment. Oak usage January 2022 to present.

[16] Cycle one comprises of resources for English, maths, science, history, and primary geography. Cycle two comprises of the remaining subjects Oak is developing resources for: art & design, computing, design & technology, PE, RE, modern foreign languages, music, RSE/RSHE, citizenship and secondary geography.

Autumn 2025. Figure 1 below shows that Oak usage is increasing at the same time as more of its new resources are made available to teachers.

Figure 1: Direct Teacher Users of Oak's Products (Jan 2022-Present)[17]



As part of the September 2024 wave of the DfE's School and College Voice survey (hereby referred to as the SCV), the DfE posed several questions relating to Oak to gain further insight into its potential impact.[18] When asked about Oak usage the survey found, as shown in Figure 2 below, that only a small minority (12%) of teachers used Oak resources to develop their lesson planning in the 2023/24 academic year. Instead, teachers were much more likely to use resources that they had developed themselves, with a large majority (82%) developing lesson planning this way. Meanwhile, a majority of teachers used resources developed by their trust, school or other teachers (69%), other free online resources (67%), or resources paid for by their school, trust or other teachers (66%). This suggests that teachers frequently utilise a range of resources in developing their lesson plans, and therefore resources in the market are often complementary of each other. It should however be noted that responses to this survey relate to the period prior to the release of Oak's new curriculum resources and therefore do not reflect the impact that this new offering has had on usage.

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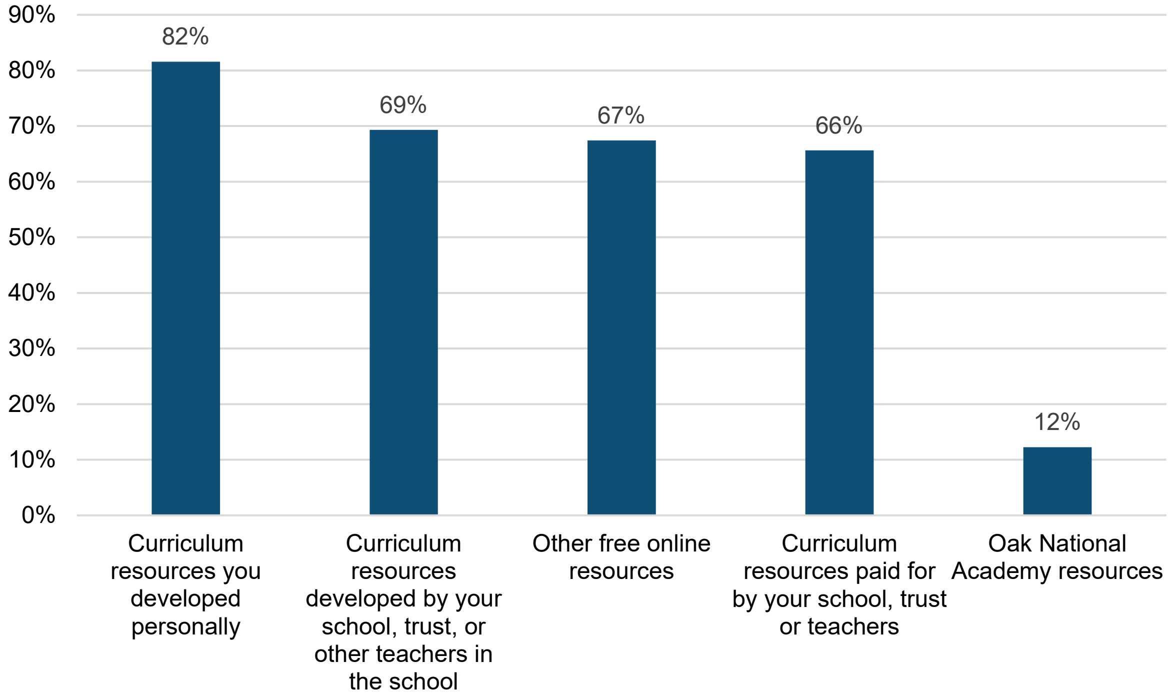
[17] Chart provided by Oak National Academy for market impact assessment. Oak usage January 2022 to present.

[18] The SCV is designed to collect robust evidence to help the Department for Education understand the perspectives of teachers and leaders. This allows us to make more effective policy. The SCV works as a series of short surveys across the academic year, covering a range of new and longstanding policy issues. School and College Voice, September 2024. [School and college voice: omnibus surveys for 2024 to 2025 - GOV.UK](https://www.gov.uk).

Figure 2: Thinking about the last academic year (2023/24), which of the following resources did you use to develop your lesson planning?[19]

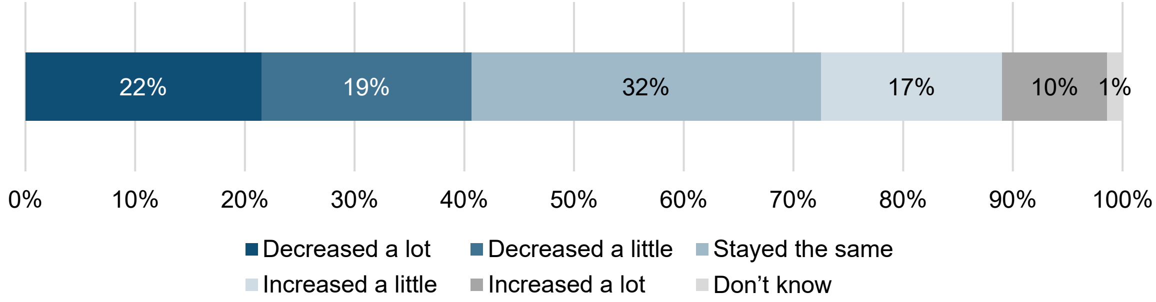


The DfE's SCV survey also suggested that there was a net reduction in usage levels by teachers using Oak resources between 2022/23 and 2023/24, with 41% of respondents decreasing their usage to some degree.[20] This compared to 27% of teachers who had increased their usage, as shown in figure 3 below. More than 1 in 5 (22%) said that their usage had decreased a lot, with almost another 1 in 5 (19%) saying their usage had decreased a little. In comparison, a minority of teachers reported an increase in their use of Oak resources, with 17% reporting a slight increase and 10% reporting a significant increase. Almost 1 in 3 teachers (32%) reported that their use of Oak resources stayed the same in the last academic year, with 1% reporting that they did not know. This potentially showed a significant change in usage, with double the number of teachers reporting that their use decreased a lot compared to those whose use increased a lot. Again, these findings relate to usage which predates the main release of Oak's new lesson resources (see page 8).

[19] School and College Voice, September 2024. School and college voice: omnibus surveys for 2024 to 2025 - GOV.UK.

[20] School and College Voice, September 2024. School and college voice: omnibus surveys for 2024 to 2025 - GOV.UK.

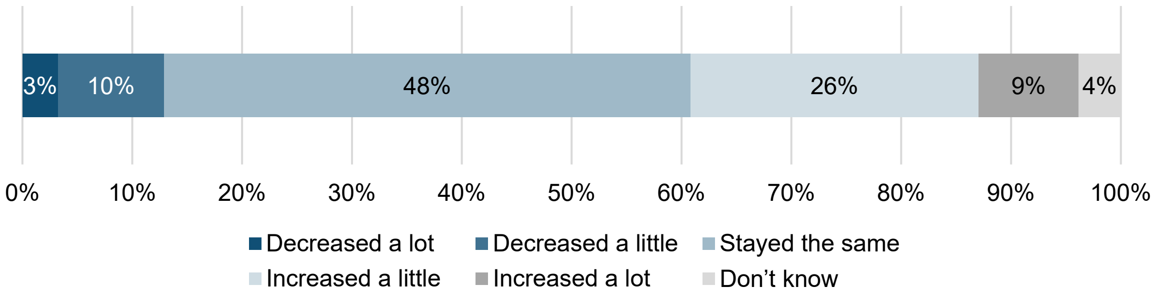
Figure 3: In the last academic year (2023/24), did your use of Oak National Academy resources, increase, decrease or stay the same compared to the academic year before (2022/23)?[21]



The SCV survey showed that usage of curriculum resources paid for by the teacher's school, trust or teachers was more likely to have either remained the same or increased compared to the previous year. Shown in Figure 4 below, the survey found that in the last academic year (2023/24) almost half (48%) of all teachers reported that their use of these paid for resources had stayed the same compared to the previous year. Meanwhile, more than one in three teachers reported an increase (35%) in the use of resources paid for by their school, trust, or teachers, with 26% reporting it increased slightly and 9% by a lot, with a smaller number of teachers reporting that their use of resources paid for by their school, trust, or teachers decreased by a little (10%) or decreased by a lot (3%). This demonstrates that Oak had likely had a limited impact in disrupting the use of paid for resources at that time, given that a large majority (83%) of teachers' use of these resources had either stayed the same or increased compared to the previous academic year. The data does not show the change from the 2021/22 to the 2022/23 academic year when Oak was initially launched as an NDPB, and its impact could have been potentially greater.

[21] School and College Voice, September 2024. School and college voice: omnibus surveys for 2024 to 2025 - GOV.UK.

Figure 4: In the last academic year (2023/24), did your use of curriculum resources paid for by your school, trust or teachers increase, decrease or stay the same?[22]



External survey data from Green Shoot Market Intelligence also offers some evidence demonstrating Oak's limited market influence between January 2023 and January 2024.[23] During this time there was no significant change in the proportion of teachers that claimed to have used Oak. Indeed, the share of teachers in their survey who had ever used Oak remained fairly consistent in January 2024 (50%) compared to January 2023 (49%).[24] There was also no substantial change in regular usage among respondents, such as those using its resources once a week or those using it a few times per week.

There is a range of factors that may have influenced Oak usage during this period. For example, 34% of Oak lessons and resources were taken down from the platform from September 2022 due to the end of licencing agreements with some of Oak's curriculum partners. These are now being replaced. It may also be that once teachers and their pupils returned to the classroom, the materials which had been designed at pace to support remote learning were less useful to teachers (as opposed to the new resources which Oak is releasing which are seeing a more recent surge in usage since January 2024). Qualitative evidence from Oak's annual report of the 2022/23 academic year suggests that unlike during the pandemic when Oak was seen as a necessary and valuable tool, many teachers had been actively discouraged from using Oak by their managers as it was seen as "lazy" and only to be used "in an emergency".[25] The Department notes that reliance on other platforms also reduced in some cases during

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[22] School and College Voice, September 2024. School and college voice: omnibus surveys for 2024 to 2025 - GOV.UK.

[23] Green Shoots Market Intelligence (2024). 2024 School-Sector Landscape Report (greenshootsmi.com).

[24] Green Shoots Market Intelligence (2024). 2024 School-Sector Landscape Report (greenshootsmi.com) and Green Shoots Market Intelligence (2023). 2023 snapshot of the UK Schools education landscape – Green Shoots Market Intelligence.

[25] ImpactEd Evaluation (2023). Oak's annual impact report for teachers, pupils and the education sector for 2022/23 | Oak National Academy.

this period. For example, BBC Bitesize saw a surge in usage during the pandemic to an average of 2.7m unique users in 2020/21 but has since reduced to 1.5m per year.[26] [27]

Increasing Oak usage and market impact since January 2024

Since January 2024, Oak has seen a substantial rise in usage and the timing of this is consistent with the start of the release of new resources (as set out above). The DfE believes this will be likely to have led to a greater market impact as more teachers are now using Oak's products. The most recent Oak annual evaluation report conducted by ImpactEd for 2023/24 showed there were around 100,000 direct users from February to July 2024.[28] Oak has shared its methodology for calculating direct users, which aims to avoid duplication in usage figures.[29] Using the same methodology as Oak's report and to compare with the findings of the SCV this equates to around 21% of teachers.[30] This aligns closely with <REDACTED> data from March 2024, showing the percentage of teachers and school leaders in England who had used Oak in the last 6 months was <REDACTED> in 2024.[31] However, there is some disparity between these figures and the SCV figure of 12% of teachers using Oak resources for lesson planning reported above (see page 9). There are potential reasons for this difference, such as the framing of the question in the DfE survey, as some users might use Oak for purposes other than to develop their lesson planning (e.g. in a more ad hoc way).

It is also worth noting not all Oak usage is direct, as teachers using Oak resources frequently share them with colleagues. This suggests that Oak may have greater reach than the figures on direct usage imply. A survey of 429 teachers who use Oak conducted in March 2024 showed that 91.6% shared the resources they downloaded with others, with 54.4% sharing via their school's shared drive, and 37.1% sharing them directly.[32] Given the 100,000 direct users, Oak have calculated that there could have been up to 92,000 indirect users between 24th February and 24th July 2024.[33] [34] Based on these calculations there would, in total, be a 115% increase in usage compared to the previous

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[26] BBC (2021) 2020-21.pdf.

[27] BBC (2024) BBC Group Annual Report and Accounts 2023/24.

[28] ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[29] For example, where Oak have implemented log-ins (such as Aila), almost all users (97.5%) are accessing Oak on a single device. Furthermore, the vast majority (87%) of all lesson downloads are made using a "desktop or laptop" device and 91% of Aila-generated resources are downloaded on a "desktop computer." Oak have concluded that it is likely then that that multiple teachers will access Oak's resources on the same device/browsers when planning lessons.

[30] Oak National Academy calculate the percentage of teachers using their resources based on School workforce in England, Reporting year 2023 - Explore education statistics - GOV.UK.

[31] <REDACTED>

[32] ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[33] ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[34] Dr Samuel Sims at the UCL Institute of Education and analysts at the Department for Education have reviewed and provided feedback on this approach for estimating indirect users. Further work to improve the estimation is now underway between Oak and ImpactEd.

year, a figure that may be an underestimate if resources were shared with more than one other teacher. [35]

Finally, Oak's latest usage data for the period July 2024 to February 2025 shows that 182,775 teachers had directly used Oak's curriculum resources in the last six months, equating to more than one in three teachers in England.[36] This represents a 206% rise compared to the same period the previous year. The sudden rise, as set out above, is likely to be a result of Oak's roll out of new full curriculum packages (as set out above), as well as launching its AI lesson assistant (Aila) in September 2024.[37] The data does not offer insight on the extent to which teachers may be substituting commercial resources for those produced by Oak, if at all. The DfE will continue to keep Oak's impact on the market under review.

[35] ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[36] Data provided by Oak National Academy for market impact assessment. Oak usage February 2025.

[37] This included new resources in the subjects of maths, English, science, primary geography and history.

Impact on teacher workload

One of the core objectives of establishing Oak as an NDPB was to save teachers lesson planning time and reduce their workload.[38] For teachers and leaders considering leaving the English state school sector, high workload and stress and/or poor wellbeing were the two most commonly cited reasons. 44% of teachers and middle leaders reported spending too much time on individual planning or preparation of lessons in 2024 vs. 48% in both 2022 and 2023.[39] This was because it was found that a very large proportion of teachers planned their lessons from scratch, using valuable teacher time.[40] Evidence suggests that Oak is having a positive impact on workload. Survey data from ImpactEd's Oak evaluation report for 2023/24 demonstrates that Oak users' workload is less burdensome than non-users' workload to a statistically significant degree, with Oak users reporting working a mean of 40.9 hours a week compared to 45.7 hours for non-users".[41] This may be a correlation and does not prove a causal relationship between Oak usage and lower workload. Teachers self-select into being Oak users and so there may be other factors driving both Oak usage and users' workload reduction. For example, users of Oak may in general be more prepared to use ready-made resources rather than to prepare their own. The ImpactED 2023/4 evaluation will not have taken into account the full impact of new lesson resources that Oak began to release from September 2023 (and which are continuing to be rolled out). These have the potential to further increase the positive impact of Oak resources on teacher workload by being specifically designed to support classroom teaching.

ImpactEd's Oak evaluation report for 2023/24 shows that 73% of Oak users reported that using Oak has saved time, with 45% decreasing their workload with a median time saving of 4 hours per week.[42] Meanwhile, the other 28% reported that using Oak had allowed them to repurpose saved time for other useful activities such as supporting pupils in class. External survey data from Green Shoots Market Intelligence research corroborates this, with 39% of teachers in their survey agreeing that "having access to Oak resources saves me time" and 23% disagreeing.[43] Note, however, that this data does not tell us whether this reduction in workload is due to teachers spending less time planning their lessons from scratch (as was the intention when Oak became an NDPB in 2022) or whether they have replaced other resources with Oak (which could have potential negative implications for the commercial market).

With the available evidence, therefore, it seems that Oak is believed to help teachers with their workload in a context where teacher workload has increased since 2022 and is

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[38] Zahawi (2022). Education Secretary promises to harness 'energy and expertise' of teachers - GOV.UK (www.gov.uk).

[39] Department for Education (2024). Working lives of teachers and leaders: wave 3 - GOV.UK

[40] 46% of primary school teachers and 29% of secondary school teachers.

[41] ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[42] ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[43] Green Shoots Market Intelligence (2024). 2024 School-Sector Landscape Report (greenshootsmi.com)

considered a genuine concern for many teachers.[44] However, in assessing the extent of Oak's impact on workload, it should also be noted that there is not a benchmark against which to compare Oak, since the DfE does not have comparable estimates of how using other commercial suppliers' resources might reduce teacher workload.

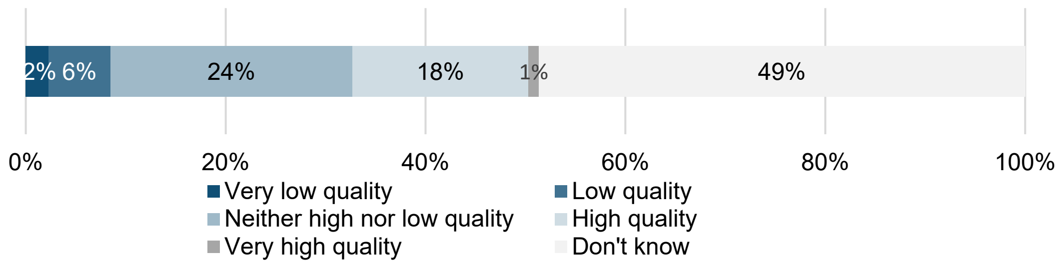
[44] DfE (2024). Working lives of teachers and leaders: wave 2 summary report - GOV.UK (www.gov.uk)

Impact on resource quality

Another core objective of making Oak an NDPB was to improve the quality of online curriculum resources available to teachers and pupils by displacing lower quality materials from online repositories.[45] It was also intended that the intervention would exemplify best practice in curriculum design and drive-up curriculum expertise at a system-level which will ultimately have a positive impact on teachers' planning behaviours and demand for high quality resources. Whilst it is not possible to understand the transfer from usage of such resources to Oak, the available evidence is positive for Oak when it comes to quality of resources. For instance, Oak's evaluation survey data shows 52% of users agreed that Oak's curriculum and resources have improved the quality of lessons with only 15% of users disagreeing.[46] Green Shoot Market Intelligence data show very similar findings, with 50% of users agreeing that "Oak resources are high quality" with only 15% disagreeing with this statement.[47]

The Department for Education's SCV survey also asked teachers and school leaders about their perceived quality of Oak's resources. Results from the SCV survey, presented in figure 5 below, show that a minority of teachers perceived the quality of Oak resources to be of either high (18%) or very high quality (1%). Which was greater than the share of respondents that perceived the resources to be of low quality (6%) or very low quality (2%). However, almost half (49%) of all teachers surveyed responded 'don't know', with almost a quarter (24%) viewing them as neither high nor low quality. These results may partly be driven by the fact that the survey was of all teachers, including high levels of non-Oak users. These results may partly be driven by the fact that the survey was of all teachers, including high levels of non-Oak users. Furthermore, the SCV surveyed the period before all cycle one resources had been released in September 2024.

Figure 5: In general, how do you perceive the quality of the Oak National Academy resources?[48]



[45] DfE (2022). Curriculum body market impact assessment (publishing.service.gov.uk). p.14

[46] ImpactEd Evaluation(2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[47] Green Shoots Market Intelligence (2024). 2024 School-Sector Landscape Report (greenshootsmi.com)

[48] School and College Voice, September 2024. School and college voice: omnibus surveys for 2024 to 2025 - GOV.UK.

ImpactEd's 2023/24 evaluation of Oak reveals that there was no significant difference between Oak's users and non-users on their perception of the proportion of their pupils exceeding expectations and behind expectations in the 2023/24 academic year.[49] This is despite the evaluation report for the previous year showing that users were far more positive about their pupils' academic performance than non-users, with users reporting that 40% of their pupils were exceeding their expectations (compared to 29% for non-users) in 2022/23.[50] Qualitative research from ImpactEd's 2023/24 evaluation of Oak finds that some teachers believe Oak resources have had a positive effect on academic progress, especially for children who struggle to attend lessons in person and/or children with SEND.[51] For instance, one case study on Oak usage demonstrated that teachers from Hilltop Primary School believed the accessibility of resources for SEND pupils was a particular advantage. The same case study pointed out that pupils with SEND in their class had responded well to the videos and developed a strength in French which had brought them in line with their peers.[52]

Overall, the evidence suggests that Oak is having a positive impact in terms of teachers perceiving the quality of Oak resources of being high quality and improving the quality of lesson plans.

[49] ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[50] ImpactEd Evaluation (2023). Oak's annual impact report for teachers, pupils and the education sector for 2022/23 | Oak National Academy.

[51] ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[52] In addition, one Science teacher referenced a lesson on reflection and light and that the way it was explained "was so clear and well pitched that it was very easy for my SEND pupils to access it." ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

Impact on the commercial curriculum resources market

This assessment is predominantly informed by responses from commercial suppliers to the DfE's market engagement questionnaire conducted in winter 2024/25. The questionnaire asked about commercial curriculum suppliers' domestic and international investment and revenues to understand the potential impact that Oak's establishment as an NDPB has had on the market. Suppliers were also encouraged to provide any further evidence they had on the potential market impact, along with evidence of the impact of Oak's AI learning assistant (Aila). Given there are multiple factors that influence the commercial curriculum market it has not been possible to be certain that Oak is a causal factor in many of the trends identified, and it is possible some impacts may be overstated.

Impact on domestic investment

There is a common view among commercial suppliers that Oak has likely had a negative impact on domestic investment. A significant number of suppliers that provided information stated that they have made changes to investment in domestic products since September 2022 (when Oak launched as an NDPB). These changes, which they state have been caused by Oak, have manifested in multiple ways. Some suppliers have strategically diverted investment into international products, or domestic products that are expected to produce higher returns on investment, which would lead to an opportunity cost of not refreshing or advancing other products in the domestic market. In addition, some suppliers have indicated that they have withdrawn potential investment in domestic products for reasons such as falling demand, avoiding duplication, and reduced incentive to invest in products that compete with the freely available resources developed by Oak.

Withdrawal of investment

Several suppliers have provided information to demonstrate that they have withdrawn investment from domestic products since Oak's launch as an NDPB. One of these has stated that it has cancelled a total of <REDACTED> in domestic investment in primary and secondary school resources.[53] The reason given was that Oak is perceived as a state-publisher that provides free curriculum resources, which removes the commercial incentive for publishers to invest in producing high-quality offerings. They also report that tight school budgets mean that schools have to justify spending 'every penny' and obtain sign off for purchasing, which pushes teachers towards free resources such as Oak as a savings measure. Furthermore, another supplier in the market has said that they have received feedback from schools that senior leadership are pushing for schools to cancel subscriptions to their computing resources as Oak products are free. Suppliers have claimed that this disincentivises investment in products that directly compete with ones that are free to use, as the expected return on investment is lower.

On the other hand, the findings of the DfE's SCV survey shows 35% of teachers reported that in 2023/24 their use of curriculum resources paid for by their school, trust, or other teachers had increased by either a little (26%) or a lot (9%) compared to the previous year.[54] These results suggest that despite budget constraints, surveyed schools' spending on resources had increased. This does not entirely invalidate the point that developing paid for resources has been disincentivised by Oak, given that the increased or decreased expenditure has not been quantified in these responses. This should also

[53] One supplier claims that Oak has impacted opportunities in non-core publishing in primary schools leading to the withdrawal of investment totalling <REDACTED> in subjects such as history, geography, and modern foreign languages along with others. The same supplier has similarly withdrawn investments worth <REDACTED> in products targeted at secondary schools in the domestic market.

[54] Meanwhile 48% of teachers reported that in 2023/24 their use of curriculum resources paid for by their school, trust, or other teachers had remained the same on the previous year.

be considered alongside the evidence from BESA school expenditure figures that school spending on curriculum resources declined by <REDACTED> between 2022 and 2023 (see page 6). Furthermore, there are other factors to consider such as inflation. This therefore demonstrates the complexity involved in evaluating the evidence on Oak's potential use as a substitute for paid for resources, and thus negatively impacted the curriculum resources market.

A number of suppliers have also noted they have had to reassess and make decisions regarding investment in staffing (headcount).[55] This point is worth examining as it could be argued that Oak may have had a negative impact on the employment in the curriculum resources market. Furthermore, as one supplier has stated, this may have a detrimental impact on the quality of resources as a reduced headcount could potentially limit the pedagogical expertise in the market potentially reducing the quality of resources. Nonetheless, the incidence of this is only reported from a small number of suppliers in the market and should be considered alongside the fact that there are multiple factors at play in the market affecting business operations. One such example is the emergence of AI and rising popularity of large language models (LLMs), for instance ChatGPT, which may be indirectly aiding the production of curriculum resources and supporting lesson planning without being recognised as a tool for that purpose.[56] Furthermore, specialist AI tools targeted at the education market have been increasingly rolled out by several providers, including Oak through its AI tool Aila. The impact of Aila will be assessed later in this document; however, this point is to demonstrate that this is a rapidly moving market due to technological advancements. External data from Green Shoot Market Intelligence supports this as 40% of teachers in January 2024 reported having used AI based tools to support their teaching in some way, with 15% having done so on numerous occasions.[57] It would therefore be difficult to attribute with certainty that all withdrawn investment and decreasing headcounts are a direct impact of Oak's engagement in the market, as opposed to other market influences.

Redirecting investment

There is also a common theme of suppliers stating that, since 2022, they have redirected investment into other products and areas where they believe there will be a greater return on investment. For instance, a significant portion of suppliers have made the decision to divert investment away from their domestic products in favour of international

[55] One supplier has stated the size of their domestic products team has been reduced from <REDACTED> in 2019/20 to <REDACTED> in 2024/5, noting that continued decline could lead to further reductions. Others have added that reduced investment has led to redundancies and the need in the future to assess headcounts.

[56] Indeed, a report by the Department for Education found that use of GenAI among teachers and students has rapidly increased in 2023. By November 2023, 42% of primary and secondary teachers had used GenAI in their role (an increase from 17% in April). Department for Education (2024). Generative AI in education: Educator and expert views.

[57] Green Shoots Market Intelligence (2024). 2024 School-Sector Landscape Report (greenshootsmi.com).

opportunities. This will be discussed in more detail in the section on changes to international investment; however, it should be noted that this response would have an impact on investment in the domestic market and domestic innovation as a consequence.

One supplier has contended that due to direct competition from Oak they are now spending more on other areas of marketing, which has diverted investment from what otherwise would have gone into product development. They state that Oak's influence in the market has driven up advertising costs as they compete with other suppliers in appealing to customers through online advertisements in auctions.[58] Suppliers in the market are aware of Oak's advertisement expenditure and that they need to often bid higher than competitors to ensure they rank higher.[59] They believe that Oak has a greater ability as a government backed organisation to afford the rising costs and appear higher and more frequently on search results. However, due to lack of empirical evidence the DfE is unable to verify this.

Investment unimpacted

Those that reported that they had not altered their investment into domestic products, cite their uniqueness which fulfils a particular gap in the market as a decisive factor in continuing investment as planned. Furthermore, they recognise the necessity to continue investments as planned to remain market leading and ensure their products are cutting edge and up to date with curriculum changes and publication of new guidance. They do however say that Oak's engagement in the market could impact future investment if they were to provide similar offerings that negate the USP of the supplier's products.[60]

Overall, market engagement has shown there are significant claims that Oak has influenced investment decisions, involving the redistribution and withdrawal of investment. Even though DfE has assessed Oak usage to have been steady until recently, the Department should consider the wider influence Oak has on the decisions made by suppliers and potential investors. It is also important to carry out this assessment even though in some cases it can be difficult to disentangle the changes caused by Oak from other market changes over the last two years. And although it may be the case that the changes to domestic investment have been overstated, DfE concludes that Oak has become a factor in commercial suppliers' investment decisions. Alongside other considerations, the presence of Oak as a subsidised NDPB, based on

[58] The supplier has recognised that it is difficult to quantify the rise in advertisement costs directly. This is because running PPC (pay per click) leads to advertisers competing in an auction to determine if/where their ad is ranked on a search results page for keywords. Google then charges the advertisers ad that gets clicked on, cost per click. To ensure ads are frequently appearing on Google Searches for high performing keywords, they need to often bid higher than competitors to ensure they rank higher.

[59] BESA (2024). [BESA Analysis of Oak GPC Transaction Data - BESA]().

[60] For example, a supplier of <REDACTED> believes they provide resources that would otherwise not be available in the market. They cite limitations in Oak's resources has allowed them to continue with investment without impact, although are concerned that if new <REDACTED> resources are released on Oak then this could have a detrimental impact.

suppliers' responses, may have created a level of uncertainty and risk aversion regarding the potential return of investment in the products and services offered in the domestic market. Given the recent uptick in Oak usage which coincided with a roll out of new resources, this somewhat provides a justification for why suppliers may be monitoring Oak developments closely with regard to domestic investment.

Impact on domestic revenues

Data from the Publishers Association showed that total invoiced sales in the domestic market for education resources declined by <REDACTED> to <REDACTED> in 2023 from <REDACTED> in 2022. The same figure had also declined between 2021 and 2022 by <REDACTED>. This was provided as direct evidence of Oak having a detrimental impact on the domestic revenues of commercial suppliers in the market. Although it is true that the decline in total invoiced sales coincided with the same year that Oak was established as an NDPB, this does not necessarily imply causation as purported by some commercial suppliers. It is once again worth reiterating the challenges to disentangle the impact of Oak specifically from other changes to the market, such as the aforementioned emergence of large language models (see page 21). Furthermore, between 2020 and 2022 Oak had been operating in the market prior to its establishment as an NDPB. At the same time total net invoiced sales in the domestic market grew by <REDACTED> between 2020 and 2021, although recovery following the initial shock of the COVID-19 pandemic is likely a significant factor in this growth.[61]

There is some consensus among suppliers in the curriculum resources market that Oak has had a negative impact on their domestic revenues. The majority of suppliers claimed this was detrimental and around 1 in 3 stated that it was very detrimental, with a small minority viewing the impact as neutral. A significant number of suppliers provided a similar rationale for perceiving the impact to be detrimental, namely that it is now more difficult to compete given that Oak provides similar resources freely and this comes at the expense of the take up of their own resources.

Multiple suppliers have said that current market conditions are challenging because budgetary constraints mean schools are looking for effective ways to cut costs. The rationale is therefore that schools would prefer to use resources from Oak as they are free of charge, compared to other organisations that charge a fee or subscription for their products. Furthermore, some suppliers have stated that this has been encouraged by senior leadership directing teachers to cancel paid for subscriptions in favour of free resources provided by Oak, at the detriment to the supplier's revenues).[62] This somewhat contradicts a previous point that teachers are actively discouraged from using Oak (see page 12). While these claims might not be mutually exclusive as both could occur simultaneously across different schools, the extent of each has not been quantified. On the other hand, it could be argued that Oak's intent is to improve accessibility of high-quality resources and address gaps in the market. It is understandable from a supplier perspective it may appear that teachers and schools favour Oak as a money saving measure in the context of budgetary constraints. However, from another perspective

[61] This is according to information provided by the Publishers Association during DfE's market engagement.

[62] One supplier also noted that customer interactions have changed in response to this, as they now spend more time proving the added value of their product in comparison to ones freely available from Oak, diverting resources that could have been used elsewhere. In cases where they are unsuccessful then their revenue declines as a result.

teachers and schools may be making use of resources that they consider to be high quality and which they otherwise would not have access to, or to redistribute finances into other educational resources or areas of education and student support.

It has also been argued that a perception of Oak exists which gives them an advantage over other suppliers in the market, with numerous suppliers citing this as a reason for falling revenues. As Oak is government backed, it is perceived to occupy an elevated position compared to the rest of the suppliers in the market. It has also been noted numerous times in information provided by suppliers that Oak is perceived to be Ofsted approved. This is despite the fact that Oak states on its website that “Ofsted will not mandate the curriculum maps and materials, and they will not be 'pre-approved' in any way. If our products and support are not helpful to a particular school’s context, they can and should entirely ignore us”.[63] However, this does not entirely negate the point that this misperception may still exist and may be having an impact on teachers’ decisions. DfE recognises that the possible belief that using tools and resources from Oak may prove favourable in Ofsted inspections could alter teachers’ behaviour to choose Oak resources over those provided by another supplier. If this is the case, this could have a market impact to the detriment of commercial supplier revenue. Nonetheless, it is not possible to know for certain the extent to which this view is held among teachers.

Furthermore, the change in domestic investments stated above may have consequential impact on suppliers’ revenues. For instance, one supplier stated that to avoid duplication and direct competition with Oak, they have redirected investment from publishing curriculum resources into home learning resources where they have a comparative advantage. They claim this decision has reduced the size of their target audience as they are now focusing on a smaller share of the market, meaning overall revenue will be limited as a result.

Bearing all evidence provided from suppliers in mind, it is important to assess these claims alongside the data on Oak usage and its market share. This shows that Oak’s market share in the overall UK market for curriculum resources may have declined since becoming an NDPB. Indeed, according to <REDACTED>, whilst the percentage of teachers claiming to have used Oak products in the last 6 months decreased from <REDACTED> between September 2022 and February 2023 to <REDACTED> for the period October 2023 to March 2024[64], the equivalent figures for other major providers remained fairly stable,[65] with <REDACTED> slightly increasing its coverage during roughly the same period (<REDACTED>).[66] Hence, whilst Oak has potentially taken a step backwards in terms of market share since becoming an NDPB in 2022, commercial providers may now have a relatively larger share of total market coverage. However, as mentioned previously the roll out of new resources in September 2024 corresponded with

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[63] Oak National Academy (2022). [Future of Oak Teaching & Resource Hub | Oak National Academy](#).

[64] <REDACTED>

[65] The other major providers included in this analysis were: <REDACTED>

[66] <REDACTED>

a significant rise in Oak usage. The potential for Oak to grow market influence with the development of new resources and educational tools should not be ruled out. Based on usage trends observed in previous years, it is not clear at this time how this development will be sustained in the future. However, it is also worth highlighting that whilst it may be true in some cases that Oak is used as a substitute for paid for resources as a money saving measure, evidence shows this is not currently widespread. Data from Green Shoot Market Intelligence's 2023[67] and 2024[68] UK Schools Landscape reports shows that fewer than 1 in 3 teachers who have used Oak agree that using Oak saves their school money from having to invest in other curriculum resources.[69]

In addition, based on available market intelligence data, it seems unlikely that Oak has greatly stifled competition in the commercial market by driving out smaller enterprises and creating an oligopoly of a few large firms, as was feared by some upon creation of the NDPB.[70] DfE data from November 2022 demonstrates that the majority of players in the "resources for parents and pupils" market and in the "digital learning product" market are "micro" businesses, defined as those with fewer than ten employees[71]. In addition, more recent product usage and online traffic data corroborates this, showing that there remain many smaller providers in the commercial market today[72].

Overall, it would appear the domestic market has seen some contraction since Oak was established as an NDPB. Although suppliers believe this directly indicates that Oak has had a negative impact on the market, it would be difficult to attribute this change wholly to Oak. This is taking into consideration that Oak's usage had mostly been stable between 2022 and early 2024. Furthermore, there is little evidence to show Oak has been used as a substitute for commercially supplied resources to the extent that would explain such a contraction. However, given the changes to domestic investment, such as the cancellation of projects and particularly the redistribution of investment into international markets, then this consolidated change to domestic investment is likely to have had some impact on the domestic revenues of commercial suppliers. This demonstrates a potential negative impact on the market of Oak since becoming an NDPB in September 2022.

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[67] Green Shoots Market Intelligence (2023). 2023 snapshot of the UK Schools education landscape – Green Shoots Market Intelligence.

[68] Green Shoots Market Intelligence (2024). 2024 School-Sector Landscape Report (greenshootsmi.com).

[69] With 30% of respondents claiming Oak saved their school money in January 2023, and 23% in January 2024.

[70] DfE (2022). Curriculum body market impact assessment (publishing.service.gov.uk)

[71] Aston et al. (2022). The education technology market in England (publishing.service.gov.uk). p.45.

[72] <REDACTED>

Impact on international investment

Not all suppliers that responded to the DfE's market engagement supply commercial curriculum resources outside of the UK. Of those that do, a significant number have stated that they have diverted investment from the domestic market into the international market, since Oak was launched as an NDPB in September 2022. They say that this has led to a substantial rise in investment into international products and markets, but at the detriment to the domestic market.

Suppliers, in their response, frequently cited that Oak's direct competition in the domestic market has led to them seeking investment opportunities in areas where Oak has less presence.[73] The rationale is that Oak currently does not have a strong international presence, making opportunities in that area more attractive with a larger expected return on investment.[74]

Despite growing international opportunities suppliers are conscious that Oak's resources are available on a standard Open Government License (OGL) and not geo-restricted. Although Oak does not market its resources internationally, it is possible for Oak's resources to be accessed for free internationally with the possibility to grow its international influence. The feasibility of this is increased by the fact that there is a substantial number of international schools which follow the English national curriculum owing to its highly regarded standard.[75]

Not all suppliers have increased their international investment since September 2022. One supplier has claimed that they have had to focus resources on the domestic market, with the opportunity cost of delaying international expansion. Similarly, another supplier has indicated that they have reconsidered launching international products, as they view Oak's availability as an added a barrier to entry which limits their ability to compete effectively internationally.

Given that Oak has seen very little expansion or usage in the international market, it would appear that it has not been detrimental to the international investment opportunities of commercial suppliers. Furthermore, as pointed out in the last section, DfE believe that Oak has had some impact in redirecting domestic investment internationally, leading to an overall increase. There is a possibility that the situation could change given Oak's Open Government Licence: however, its influence at this time is limited.

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[73] For example, one supplier has deprioritised investment into its products tailored to early years and foundation subjects in favour of international opportunities.

[74] One supplier's evidence supports this claim, stating that international investment has been a key focus of theirs and they have seen significant growth in the use of their resources internationally. Another added that international investment has increased significantly since September 2022, which was particularly strong in <REDACTED>.

[75] For this reason, one supplier has strategically focussed its international investment in schools that do not follow the national curriculum, as to avoid potential competition with Oak. Others have noted concerns on future investment reliant on Oak's potential popularity abroad.

Impact on international revenues

There was a mixed response by suppliers when they were asked how they would describe the impact of Oak on their international sales volumes and revenues since it was launched as an NDPB in September 2022. The majority of suppliers viewed the impact as neutral, a minority viewed it as detrimental, and very few suppliers viewed it as very detrimental. This demonstrates that there has likely been a less significant impact on the international market compared to the domestic.

There is evidence of some international awareness of Oak and its free online resources despite not being promoted or widely adopted in the international market. One supplier noted that during conversations with international customers in Dubai, Oak has been referenced occasionally. Some suppliers have noted that this could potentially change if Oak usage were to expand and that it is too early to assess the true impact of Oak on international sales given the relatively short period since the OGL was established.

Another supplier has stated that reduced profitability has potentially had a knock-on effect on international sales, given that it has limited their ability to invest in product development. This is because they claim that their product portfolio is narrowing over time, due to this reduced investment in product development. This in turn reduces the supplier's offering of products on the international market.

One supplier claimed that they had expected greater returns on investment from the international market than have transpired. Other suppliers stated that there has been a neutral impact on their international revenues, with one citing the rapid growth of their international business as evidence of this.[76] Another said that export sales and revenues have increased significantly since Oak launched as an NDPB. However, they do recognise that this is reliant on Oak not being a significant player in the international market, and one supplier has pointed out they monitor any developments in relation to this closely.

This evidence to a broad degree corroborates the desk-based research conducted by the DfE while market engagement was ongoing, demonstrating that currently Oak's impact on UK suppliers' international revenues is likely to be very limited. Not only is Oak not marketing or promoting its products internationally, but its reach outside of the UK is relatively modest. According to Oak's data on international downloads, only 13.6% of Oak download events took place outside the UK in the 2022/23 academic year, amounting to only 44,000 resource download events[77]. This is a very small figure when set in the context of an international market valued at £469m by the PA[78], and given that an estimated 2 million children attend international schools which teach to English

[76] Another supplier also added that export sales and revenues have increased significantly since Oak launched as an NDPB.

[77] Data on Oak international usage provided by Oak National Academy for market impact assessment.

[78] Publishers Association (2024). Publishing in 2023 - Publishers Association.

qualifications.[79] Moreover, Oak's international downloads fell by around 24,000 between 2021/22 and 2022/23, whilst the UK commercial sector's international market value significantly grew.[80] Hence, based on the current available evidence, it seems unlikely that Oak has had a significant negative impact on commercial providers' international revenues.

[79] ISC Research (2022). The new international school data for 2022 - ISC Research. 6 million children attend English-medium international schools, a third of which teach to English qualifications.

[80] Data on Oak international usage provided by Oak National Academy for market impact assessment.

Impact of Oak's AI lesson assistant (Aila)

The vast majority of suppliers believe that Oak's AI lesson assistant (Aila), which was introduced in September 2024, has a potential detrimental or very detrimental impact on their revenues. Their rationale echoes the same reasoning that suppliers view Oak as detrimental to their investment and revenues in the domestic market. Multiple suppliers have reiterated that in the context of constrained resources, potential customers may be incentivised to use Aila in place of commercial resources. Furthermore, suppliers have asserted that there is a perception that initiatives like Aila are government endorsed and Ofsted approved which suppliers have argued creates an uneven playing field.

The use of AI in the curriculum resources market is still a relatively new technology which suppliers and consumers are only just seeing the potential of. One supplier claims the 'chilling effect' of both the availability of Oak resources and its Aila tool will reduce competition in the emerging market for AI in education, which could hinder innovation through research and development in AI tools delivered by the market. This view is partly backed by a supplier reporting that they had plans to develop AI-driven tools to enhance teacher support and resource customisation. However, following the announcement of Aila, this planned investment was cancelled.[81] On the other hand, it could be argued that there remains a competitive market for commercial suppliers to launch and continue to develop AI tools such as <REDACTED>, with other suppliers specialising in AI. Furthermore, DfE is aware of the development and rapid popularisation of non-specialist LLMs, such as ChatGPT, which have had multiple classroom applications by teachers. This is likely to have some impact on the commercial curriculum market.[82] Indeed, data from Green Shoot Market Intelligence demonstrated that in January 2024, when teachers were asked which AI tools they have used to support teaching, the most common was Chat GPT, which had been used by 116 (28% of the sample).[83] <REDACTED> was the most widely used education specific tool, used by 12 respondents (3%), followed by <REDACTED> used by 5 respondents (1%). Although this survey was conducted prior to the launch of Aila, it does show the impact of non-specialist AI tools in education.

Several suppliers have raised concerns over the influence that Oak could have on the market if teachers were to convert wholly to using Oak's curriculum maps and resources. One supplier points out that their biggest competitor is teachers designing content for themselves. Given that Aila has been trained on existing Oak schemes and allows teachers to create lesson materials derived from the Oak content, over time there is a potential risk that some schools or teachers resort only to this content. Consequently, this could stifle competition in the curriculum resources market and reduce the options available to teachers and schools.

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[81] Another supplier has claimed to have placed plans to explore AI-driven tools for teacher support and resource customisation on hold due to concerns over Aila's potential market impact.

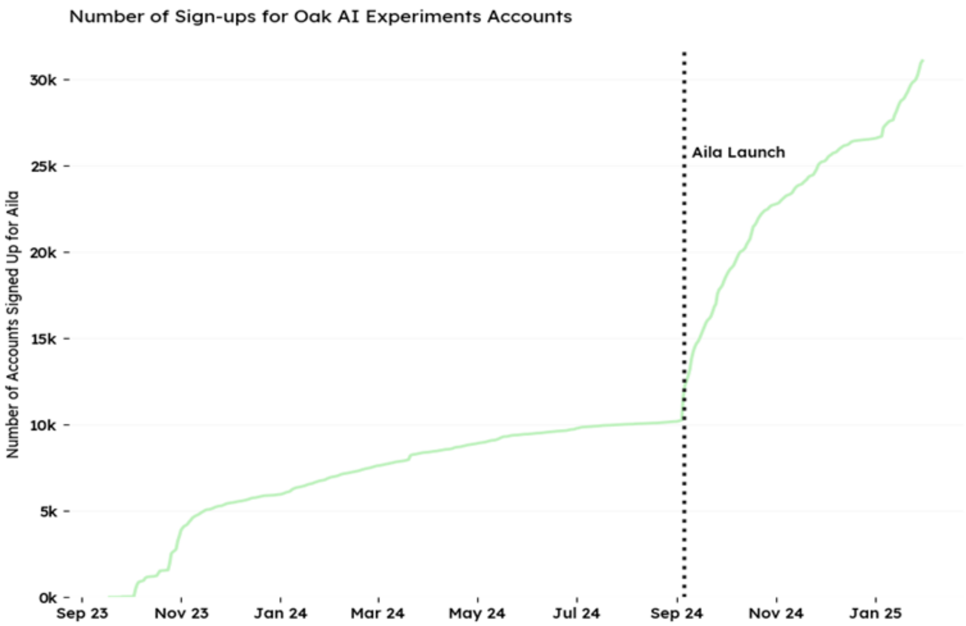
[82] Department for Education (2024). Generative AI in education: Educator and expert views.

[83] Green Shoots Market Intelligence (2024). 2024 School-Sector Landscape Report (greenshootsmi.com).

Finally, it has also been claimed that the launch of Aila has led to increased marketing costs for other suppliers. One supplier stated that currently Aila is advertised in competition with their AI product. Consequently, this is having an ongoing impact on their cost per acquisition (CPA) of new customers and reduction in revenue. They have quantified this and calculated that it is leading to an increase in cost per acquisition of <REDACTED> and a <REDACTED> reduction in acquisition volume and therefore revenue.

It is still too early to fully assess the potential impact that Aila has had on the market, and the DfE has only recently had access to Oak's AI tools usage data. The data provided by Oak shows that since its launch there has been a rapid rise in user creating accounts to use Aila which reached 30,000 in January 2025, shown in Figure 6 below.[84] As at 19 February 2025, this included 18,000 active teacher users in the previous 90 days prior to 19 February 2025, and since the launch of Aila users had created over 43,000 lessons and downloaded over 50,000 resources.

Figure 6: Number of accounts signed up for Oak National Academy's AI lesson assistant (September 2023-January 2025)[85]



[84] Data provided by Oak National Academy for market impact assessment. Oak usage February 2025.
[85] Chart provided by Oak National Academy for market impact assessment. Oak usage February 2025.

DfE assessment

Accurately assessing Oak's impact on the commercial curriculum market since it was established as an NDPB is a complex task. Given the wide-ranging factors that shape how the market operates, it is difficult to disentangle some of the impacts caused by Oak from other market developments.

Based on the information provided to the DfE through market engagement, the department understands that Oak has become a factor in commercial suppliers' investment decisions. The impact of this may have been detrimental to the resource offering from commercial suppliers, as investment in some projects has been withdrawn or redirected elsewhere. Due to the difficulty in quantifying this impact it is not necessarily clear the extent to which this has been detrimental to the market. It is however true that Oak's impact may have been limited by its relative market power. Indeed, Oak usage remained stable between September 2022 (when it became an NDPB) and January 2024, and hence the available evidence on usage suggests that it had not had a significant negative impact on the commercial market in that period. However, during this period of steady usage Oak was phasing out old pandemic era materials, preparing for the release of its first cycle of new resources that would be targeted more to classroom use. As a result, there was an observable resurgence in usership from January 2024 onwards, as it began to significantly update content. Furthermore, Oak usage increased significantly in September 2024 when its new full curriculum packages were made available, as well as the launch of its AI tool Aila. DfE therefore believes that Oak is now having a greater impact on the curriculum resources market as more teachers are now using its products. In addition, a similar increase might be expected once cycle two materials have been made available in Autumn 2025.

The domestic market has also contracted in the years following Oak's establishment as an NDPB. Total invoiced sales in the domestic market for education resources declined by <REDACTED> to <REDACTED> in 2023 from <REDACTED> in 2022.[86] Although suppliers believe this is a direct indication of Oak having a negative impact on the market, it would be difficult to attribute this change completely to Oak. This is taking into consideration the steady Oak usage in the years following its establishment as an NDPB. This assessment also considers other market developments such as the emergence of AI and LLMs which are seeing increasing use within the classroom. Nonetheless, Oak plausibly has had an impact on the domestic market and this has reportedly impacted commercial suppliers' domestic revenues.

Unlike the domestic market, the international market has experienced fairly substantial growth since 2022. In comparison, Oak has seen very little expansion and use internationally despite its Open Government Licence, reflecting the commitment not to promote Oak outside the UK. It is unlikely that Oak has had a significant negative impact

[86] This is according to information provided by the Publishers Association during DfE's market engagement.

on the international investment of those suppliers and in many cases suppliers have increased their international investment by redistributing investment from the domestic market. Although suppliers have noted the possibility of Oak gaining wider influence and usage internationally given that many international schools follow the English national curriculum, this does not appear to have materialised to date. It is unlikely therefore that Oak has had any significant impact on the international market to the detriment of commercial suppliers.

The assessment also provides some evidence of positive impacts from Oak for teachers. For instance, Oak appears to help teachers with their workload, with a substantial number of teachers (73% of Oak users) reporting that using Oak has saved time, 45% of whom decreased their workload, and 28% of whom repurposed this saved time for other useful activities.[87] Furthermore, the evidence points to a positive impact in terms of teachers' perspectives of resource quality. This is demonstrated by 52% of users agreeing that Oak's curriculum and resources have improved the quality of lessons, with only 15% of users disagreeing.[88] Meanwhile, the DfE SCV survey found similar results, with a larger share (19%) of teachers viewing Oak resources to be of high or very high quality compared to a smaller share (8%) who perceived them as either low or very low quality.[89]

Finally, the DfE has considered the potential impact on the market of Oak's AI lesson assistant (Aila). However, given that Aila was only launched in September 2024, it is difficult to assess the impact accurately at this time as the tool is still in its infancy. It is clear that Aila has seen a relatively quick rise in usage since its launch. It would however take time to see how long-lasting that rising influence is, as this early surge in use could be teachers trying the product out but not necessarily going on to use it to create resources for use in the classroom. On the other hand, AI is a rapidly developing technology and as such the Government will keep this under review.

Overall, it appears that Oak has had a modest impact on the domestic curriculum resources market, with an even smaller impact on the international market. DfE believes that Oak's establishment as an NDPB in September 2022 has added a degree of risk and uncertainty to the detriment of commercial suppliers' domestic investment. This has likely had some knock-on effect to the revenues of suppliers providing resources in the domestic market. It does not appear that there has been a similar impact on the international market given that a lot of suppliers are seeing increased opportunities, expanding investment, and greater revenues.

Considering wider market influences, it would be difficult to wholly attribute the contraction in the domestic market to Oak. In fact, Oak's market impact was likely limited by its relatively stable usage between September 2022 and January 2024. However, this

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[87] ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[88] ImpactEd Evaluation (2024). Our impact on teachers and pupils in 2023/24 | Oak National Academy.

[89] School and College Voice, September 2024. School and college voice: omnibus surveys for 2024 to 2025 - GOV.UK.

does not rule out the potential for Oak’s influence to increase in the future, particularly considering the recent uptick in usage in recent months. Furthermore, at this stage it is too early to accurately assess the full impact that Oak’s AI tool Aila will have on the market.

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