

EDUCATIONAL PUBLISHERS FORUM GLOBAL SURVEY OF EDUCATIONAL PUBLISHING

OCTOBER 2026



Educational Publishers Forum

**Global Survey of
Educational Publishing**

OCTOBER 2026

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1. EXECUTIVE SUMMARY

The 2026 IPA EPF Global Survey of Educational Publishing seeks to identify, quantify, and understand trends in the educational publishing sector on an international level, covering issues ranging from the impacts and implementation of technology to relationships between publishers and government ministries to sustainability. 56 respondents across 36 countries completed the questionnaire.

Their responses indicate that publishers continue to play a key role in the classroom, with 63% of respondents citing commercial publishers as the primary providers of learning resources. However, three quarters of respondents cited some level of state restriction when it comes to educational publishing, a figure that seems to be on the rise, and nearly half of all respondents described their relationship with government ministries as poor. This suggests that collaboration between publishers and governments is a fraught area requiring continued attention. Along these lines, the survey results highlight the increasing influence of educational ministries in each country, when it comes to teachers' freedom to choose which resources to procure for their classrooms.

The survey results show examples of success in public-private partnerships in various countries, including Lesotho, India, and Bosnia Herzegovina, alongside examples of barriers to successful collaboration in countries such as New Zealand, Estonia, and Portugal. Among the most common barriers are that publishers are not treated as equal partners in educational publishing, the focus on commercial publishers is dominated by cost, not value, and public sector distrust about private profit in public education limits collaborative trust.

When it comes to copyright, only 25% of respondents feel that copyright enforcement is effective, suggesting that this is another area requiring increased attention and pressure for the protection of intellectual property.

Furthermore, the adoption of digital learning materials is on the rise, with the single main impediment being teacher training in the use of these resources. However, 70% of respondents rated the impact of AI as low or moderate, a figure partially attributable to the fact that 50% of primary teachers feel that children should first and foremost develop traditional skills, including reading, writing, and communication skills.

Finally, the answers to the question on the most important forces reshaping the learning resources market included the following:

- AI tools will further enable personalised and adaptive learning
- Continued adoption of blended learning resources
- Budgetary constraints will always be an issue
- Schools becoming more 'controlled' by digital ecosystems
- OERs increasing use in some countries

Moving forward, the EPF aims to put out a Global Survey of Educational Publishing annually and, in so doing, to prove a correlation between the relationship between publishers and government ministries and the learning outcomes in any given country.

2. CONTEXT

2A. ABOUT IPA EPF

The IPA Educational Publishers Forum is a network of educational publishers from over 50 countries around the world. It is a leading global forum for debate on the evolution of pedagogy and the provision of effective learning resources, especially the application of technology and its impact on the classroom. The EPF focuses on the 5- to 18-year-old school market.

2B. WHY THE STUDY WAS COMMISSIONED

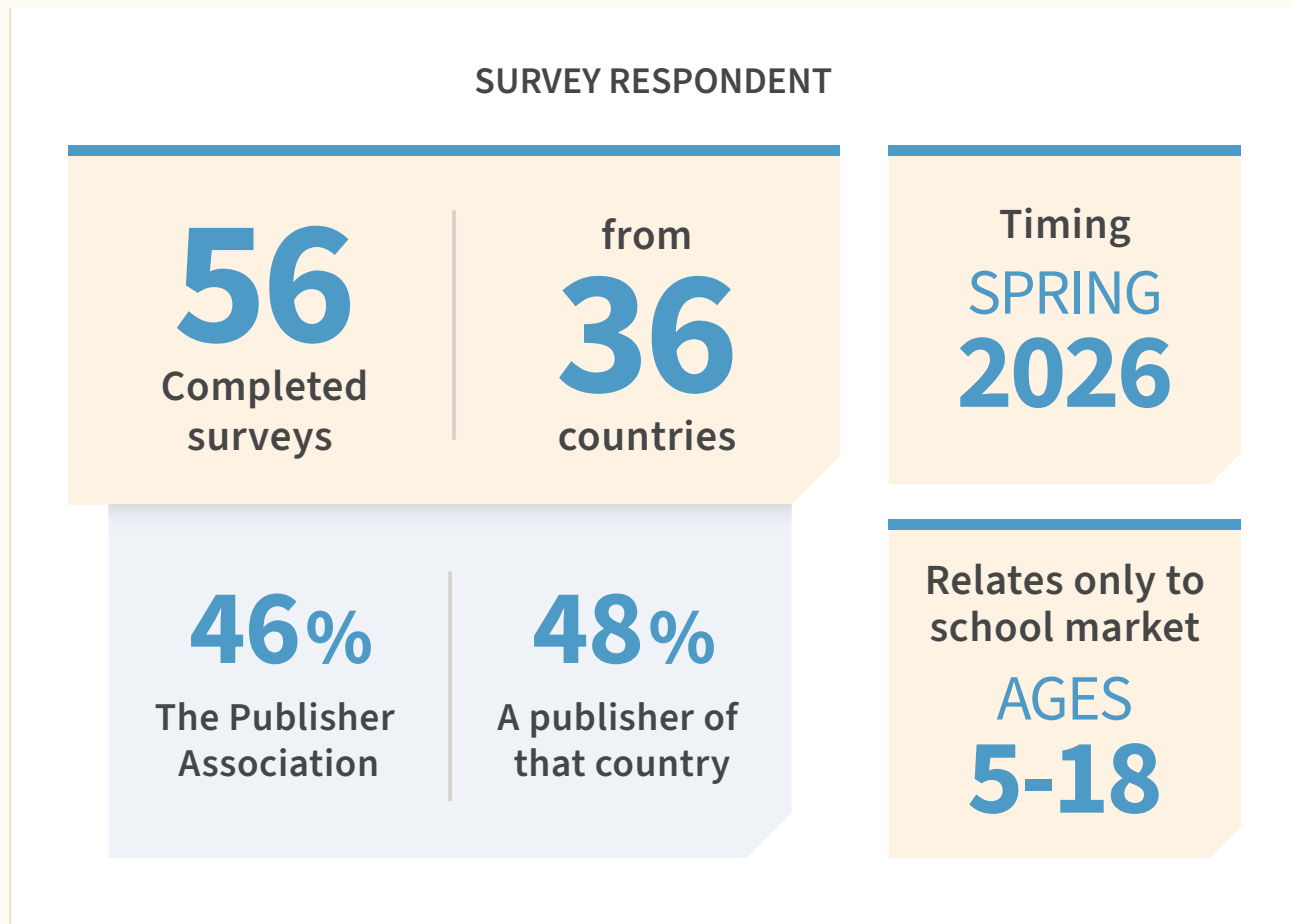
IPA EPF has never carried out a survey on educational publishing on a global scale. EPF intends to repeat this annually, which will allow trends in the sector to be identified, quantified and hopefully better understood.

2C. RESEARCH TOPICS

The research topics included:

- Digital infrastructure
- Impacts of AI thus far
- Procurement and funding models for learning resources
- Spending trends
- Relationships between Education Ministries and educational publishers
- Public private partnerships in educational resources
- Open Educational Resources (OERs)
- Copyright
- Use of technology
- Sustainability
- Main forces reshaping learning resources

3. METHODOLOGY



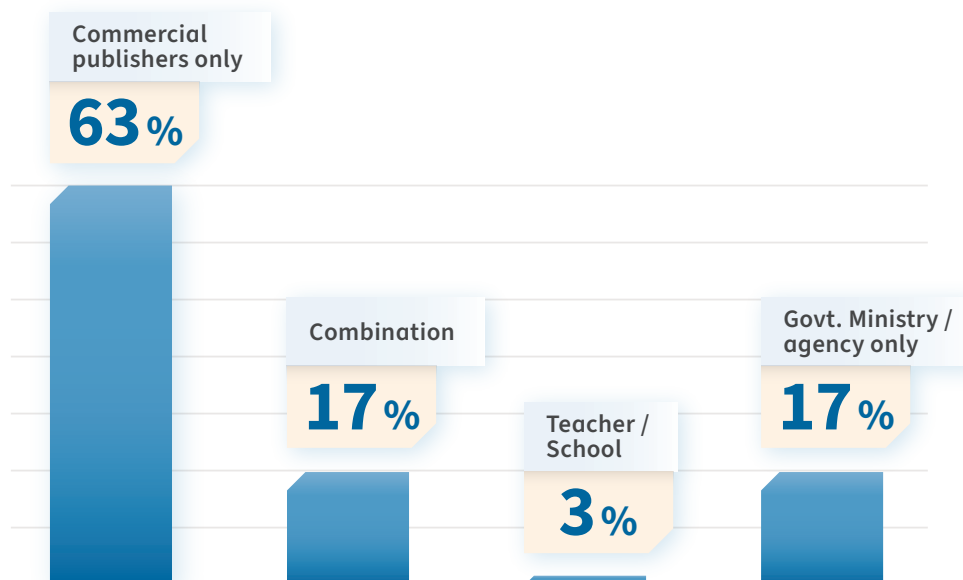
The survey was shared in the form of a questionnaire, issued in May 2026. Completed surveys were received from 56 respondents, covering 36 countries across all continents.

The responses were split almost 50:50 between representatives from local educational publishers and national publishing associations. The data relates exclusively to the school market, ages 5-18. We refer to 'learning resources' throughout, which covers both physical (textbooks and workbooks) and digital resources (interactive lessons, eBooks, assessments, online revision tools etc.).

4. DETAILED RESULTS

4A. CREATION OF RESOURCES

LEARNING RESOURCES... WHO PRIMARILY CREATES DEVELOPS THEM?

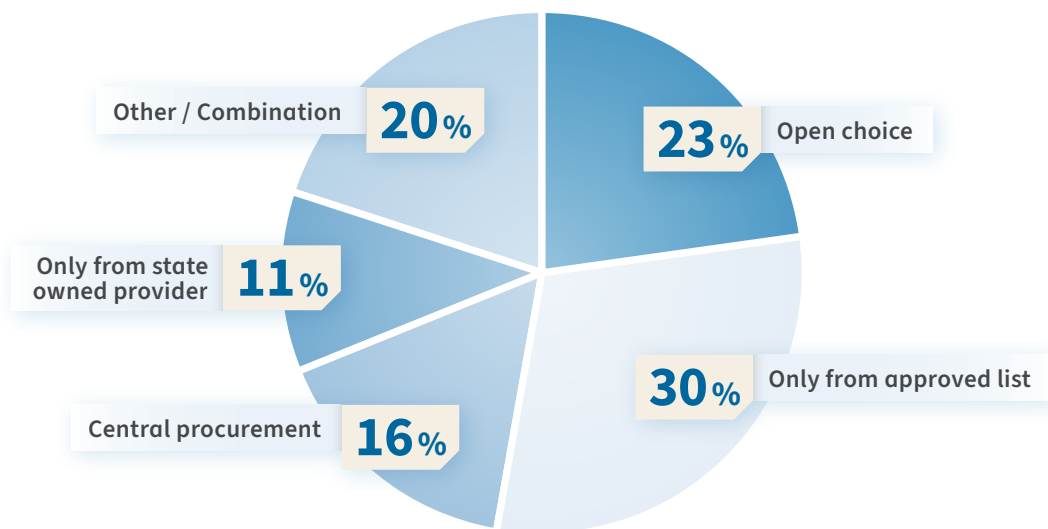


COMMERCIAL PUBLISHERS PLUS MINISTRY = 80%

The survey begins by asking who primarily creates the learning resources used in classrooms today. The role of publishers remains dominant in this domain. 63% of respondents cited commercial publishers as the primary providers of learning resources. Including respondents who answered ‘a combination of providers’ pushes commercial publishers’ involvement up to 80%. According to 17% of respondents, Education Ministries are the sole actors responsible for the creation of learning resources for classrooms. Finally, 3% of respondents cited teachers and schools as the primary creators of learning materials for the classroom.

4B. PROCUREMENT

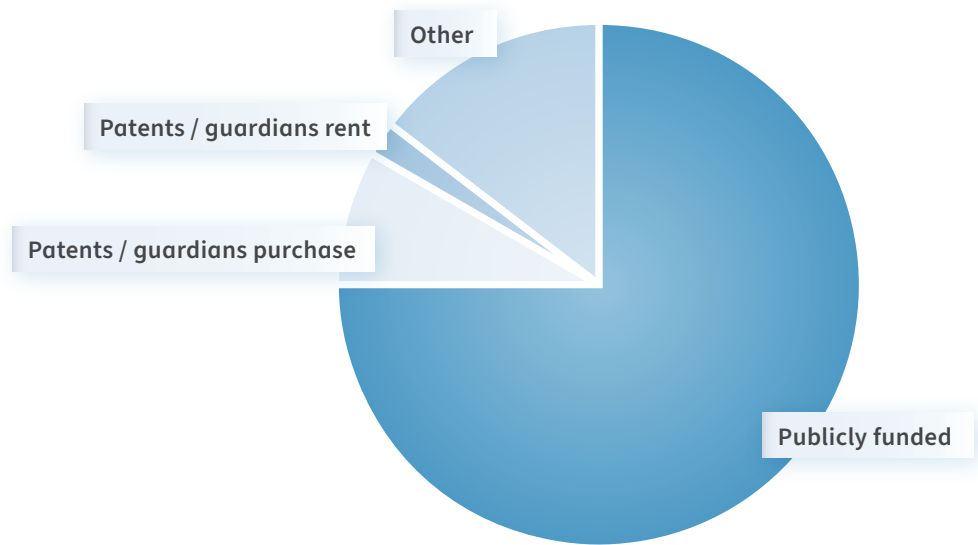
WHAT IS THE ADOPTION / PROCUREMENT MODEL?



According to the procurement model, only a quarter of respondents reported that schools have full freedom to choose from any source. All other survey options indicate some form of state control on the supply chain. While this is understandable, given the state typically acts as the primary funder of educational material, the model highlights the increasing influence of the Ministries in each country, when it comes to teachers' freedom to choose. There is some level of restriction for three quarters of respondents and countries polled. It is also obvious from the responses that all recent movements in the procurement model have been towards 'approved / centralised' rather than towards 'open'.

4C. FUNDING

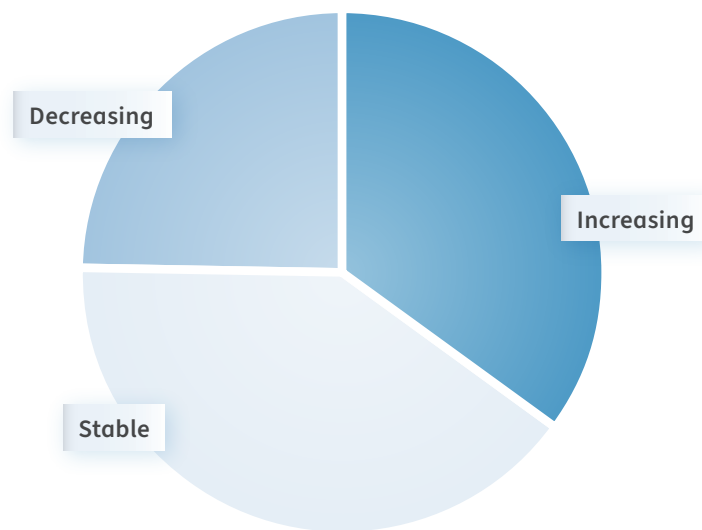
HOW ARE LEARNING RESOURCES FUNDED



Three quarters of respondents reported that learning resources were publicly funded. Parents and guardians are responsible for funding resources in roughly one quarter of markets.

4D. SPENDING TRENDS

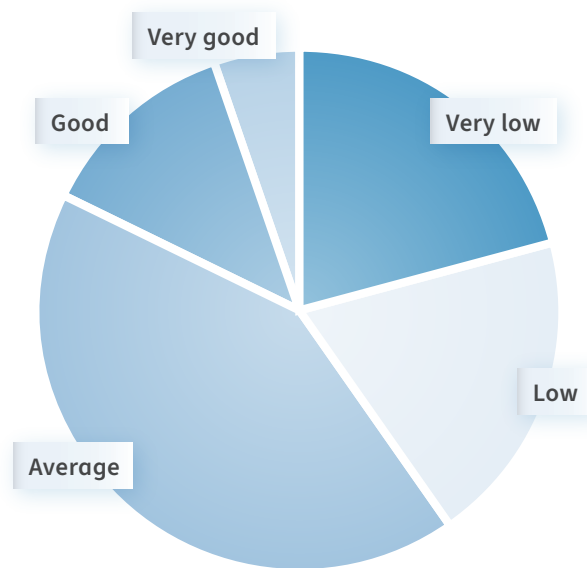
WHAT IS THE SPENDING TREND ON LEARNING RESOURCES?



The overall trend in spending on learning resources is positive, with two thirds of respondents reporting that spending is either stable or increasing.

4E. COLLABORATION

RATE THE COLLABORATION BETWEEN MINISTRIES AND PUBLISHERS



Nearly half of respondents reported their relationship with education ministries as poor, with 20% of the lucky ones reporting a good or very good relationship. EPF aims to prove a correlation between this crucial relationship and the learning outcomes in any given country. The multi-factorial nature of these outcomes makes it difficult to pinpoint this particular facet as so many other factors play a role, including teacher training/qualifications; the relative wealth of a country; the educational attainment of parents; socio-economic factors and so on. We hope that studies like this one will contribute to this evolving story.

I. EXAMPLES OF SUCCESS IN PUBLIC-PRIVATE PARTNERSHIPS

LESOTHO



At the initiative of three leading publishers, Orion, Geneza, and Ranok in cooperation with the Ministry of Education, mandatory pilot testing of textbooks along with a compulsory electronic supplement in schools has been introduced. The World Bank with the Government of Lesotho sourced literacy materials in Sesotho (local language) to improve literacy amongst the least performing public primary schools.

INDIA



A collaboration between the Ministry of Education agencies, NCERT, and multiple private technology and content partners, resulted in the DIKSHA platform, which provides curriculum-aligned digital learning resources for schools throughout India.

BOSNIA / HERZEGOVINA



Publishers who develop digital platforms, interactive content or new textbook concepts are supported by public institutions who enable testing in schools and collect feedback from teachers. This allows materials to be adapted to the real needs of teachers and students before instituting wider implementation.

JAMAICA



The Ministry of Education has collaborated with BookFusion, a Caribbean-based educational publisher to bring interactive, curriculum-aligned Primary content into a new national digital library that features multisensory eBooks for students with and without disabilities.

BELGIUM (FLANDERS)



Collaboration platforms like *Kwaliteitsalliantie* and *Leerpunt* bring Government, publishers and schools together to define quality standards, combining public policy goals with private innovation and expertise.

FRANCE



Publishers are asked to provide insights on educational matters. Meetings between publishers and curriculum designers are frequent, which help publishers understand the thinking behind curriculum design.

BRAZIL



The National Textbook and Learning Materials Program (PNLD) involves the Ministry of Education, the National Fund for Educational Development, commercial publishers and public schools. The Government defines criteria and evaluates materials, while publishers develop curriculum-aligned content and compete for approval. PNLD combines public quality assurance with private innovation, promotes competition, and ensures equitable access to high-quality learning resources for millions of students.

II. EXAMPLES OF BARRIERS TO SUCCESS IN PUBLIC-PRIVATE PARTNERSHIPS

ESTONIA



Publishers are largely seen as a delivery mechanism for learning materials who must compete with high political desires to use AI. The resources provided to classrooms depends more on cost than value and due to high turnover rates, Ministers often lack understanding about the educational publishing sector.

SLOVENIA



Publishers are excluded from discussions about curricula and textbook policy. Ministry of Education meetings are more informative than collaborative.

PORTUGAL



Government turnover rates create a lack of understanding among policymakers about the educational publishing sector. Teacher-created resources are valued above standardized resources and the public and private sectors clash due to a lack of trust.

AUSTRALIA (NEW SOUTH WALES)



For ten years, funding for schools has remained stable or decreased. Due to Australia's federated education model, territories decide how to fund their schools. Publishers are viewed as "predatory".

NEW ZEALAND



Commercial publishers and the government face a lack of communication about curriculum changes. Publishers are not consulted or considered, which makes it difficult for the sector to respond to changes

III. BARRIERS TO COLLABORATION IN PUBLIC-PRIVATE PARTNERSHIPS

The following barriers are typical of many responses:

- Publishers are not viewed as the strategic implementers of curricula, rather as a delivery mechanism of learning materials.
- The political desire to use AI is high.
- The focus on commercial publishers is dominated by cost, not value.
- In the public sector, it is rare that people remain in one position for more than five years - there is a lack of consistency in building knowledge and understanding the publishing sector.
- Publishers are not treated as equal partners in educational publishing.
- Any meetings at the Ministry of Education are mostly informative, not cooperative.
- New curricula are being introduced in which publishers did not participate.
- The government lacks technical understanding of educational publishing and logistics. By the time the government grasps the sector's dynamics, its term ends, forcing a reset.
- Public sector distrust about private profit in public education limits collaborative trust.
- Every new minister changes the plans of predecessors. They make decisions without consulting publishers and main stakeholders
- No consideration about the timelines needed to respond to the curriculum changes.

4F. QUICK RESPONSE QUESTIONS

PUBLIC-FUNDING IS USED TO CREATE OR SUPPORT OPEN EDUCATIONAL RESOURCES (OERS)?

46%
Agree

Neither

25%
Disagree

Don't know

PUBLIC FUNDING FOR OERS AFFECTS BUDGETS FOR COMMERCIAL CONTENT?

54%
Agree

Neither

23%
Disagree

Don't know

Impact of OERs (Open Educational Resources)

We asked whether public funds are being spent on OERs. Half the respondents thought they were. Their use is widespread. Notably, commercial educational publishers provide a great deal of their resources for free, in support of paid-for resources, which affects budgets for commercial publishers.

COPYRIGHT EXCEPTIONS FOR EDUCATIONAL USE (COPYING FOR CLASSROOM INSTRUCTION) AFFECT SALES OF PAID LEARNING RESOURCES?



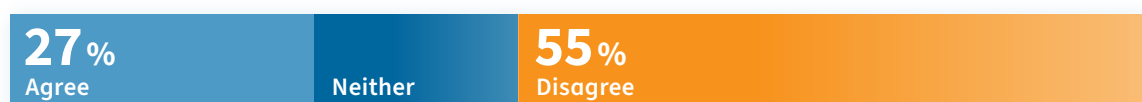
UNAUTHORISED COPYING/PIRACY OF LEARNING RESOURCES IS A SIGNIFICANT PROBLEM?



Impact of copyright exceptions

There is little debate about the impact of copyright exceptions and photocopying paid-for resources for general classroom instruction. 59% of respondents feel these exceptions adversely affect sales of paid learning resources. Additionally, 80% of respondents see unauthorised photocopying as a significant problem. This is an epidemic in schools worldwide. The costs of photocopying also outrun the following resources: paper, photocopy machine maintenance, toners and inks, teacher time, and pupils' respect for learning resources.

COPYRIGHT ENFORCEMENT IS EFFECTIVE (E.G., COMPLIANCE MONITORING, REMEDIES, PENALTIES)?

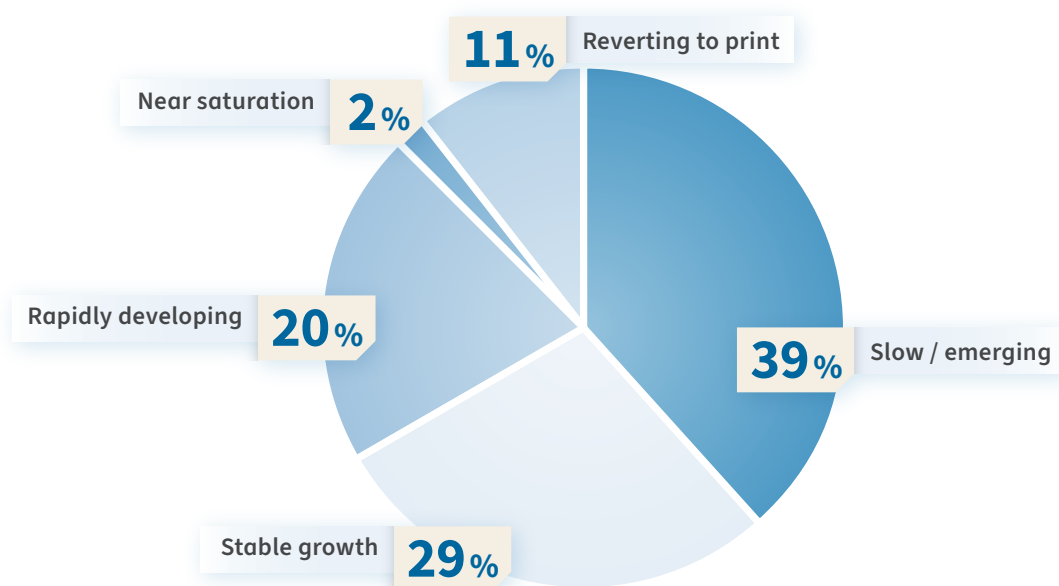


Effectiveness of copyright protection

Copyright protection is the bed rock of publishing, if it is not protectable, our work as authors and publishers is significantly hindered. Only 25% of respondents feel that copyright enforcement is effective. Clearly, this remains an existential worry at which we all must continue to work.

4G. USE OF TECHNOLOGY

DIGITAL RESOURCE ADOPTION IS...



Digital resource adoption

11% of respondents reported that digital resources are reverting to print. Sweden has executed this nationally. Half of respondents say that digital resource adoption is either growing gradually or rapidly.

COMPARED TO THREE YEARS AGO, HOW OPEN ARE TEACHERS TO USING DIGITAL RESOURCES

AGES 4-11



AGES 12-18



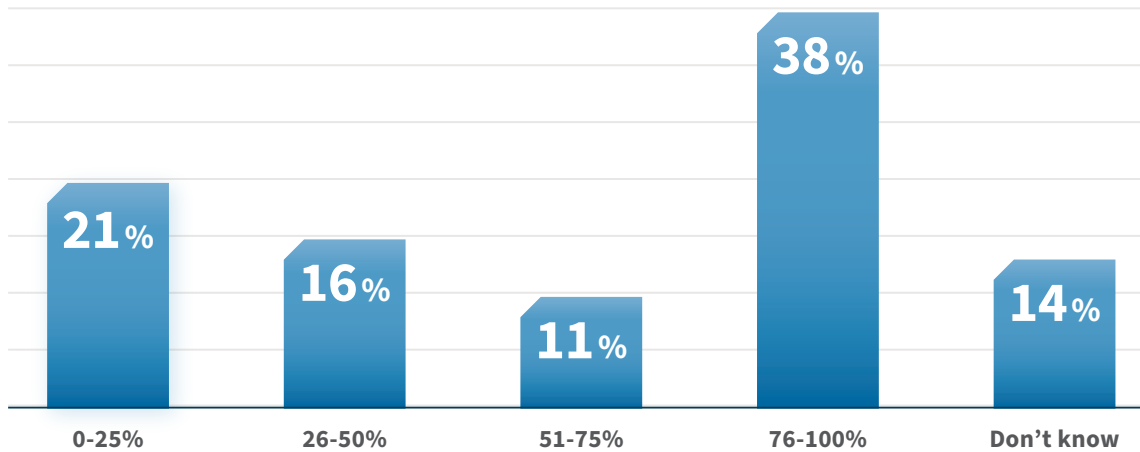
Digital resource adoption among teachers

There is a marked difference between primary teachers (5-12 year olds) and secondary school teachers (13-18 year olds). 64% of secondary teachers are more open to using digital resources than they were three years ago as compared to 50% of primary teachers. Primary school teachers feel that it is important that children develop traditional skills, including reading, writing, and communication skills, before the digital world inevitably takes hold.

We asked publishers what drives the adoption of digital resources for teachers. The main driver reported is time saving for busy teachers. A quarter of respondents rated the availability of quality, curriculum aligned content as a top driver. The remaining reasons included funding, pupil motivation, assessment and feedback, and cost vs print alternatives.

The single main impediment to adoption is teacher training in the use of digital resources. Other impediments include poor tech infrastructure, cost and inequity of individual devices, and a lack of locally produced resources.

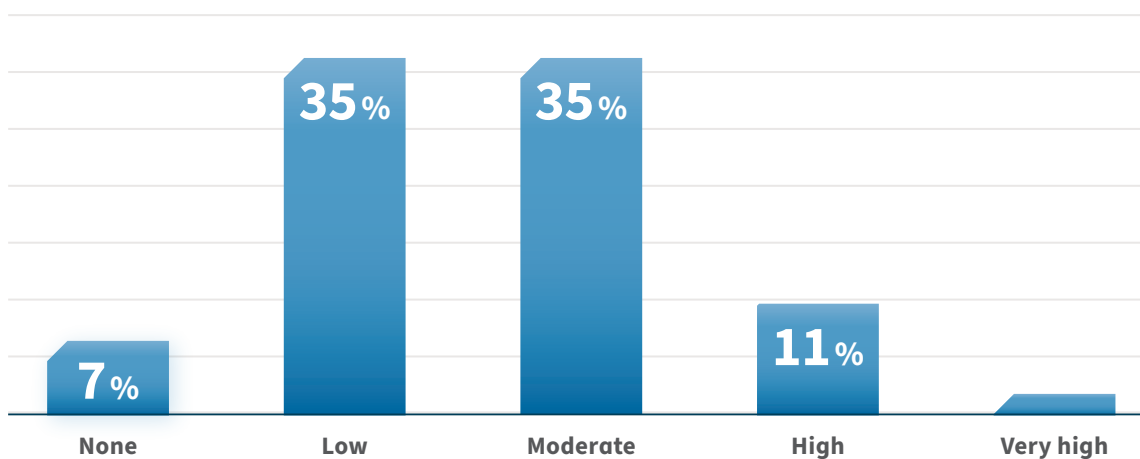
WHAT SHARE OF CLASSROOMS HAVE RELIABLE INTERNET



Access to devices and internet connectivity

Digital learning resources require equal access to devices and internet connectivity for the whole class. Survey responses suggest that almost 40% of all classrooms rate their internet connection as reliable, a figure projected to grow exponentially, bringing its own opportunities and challenges.

WHAT IMPACT HAS AI HAD SO FAR ON THE LEARNING RESOURCES

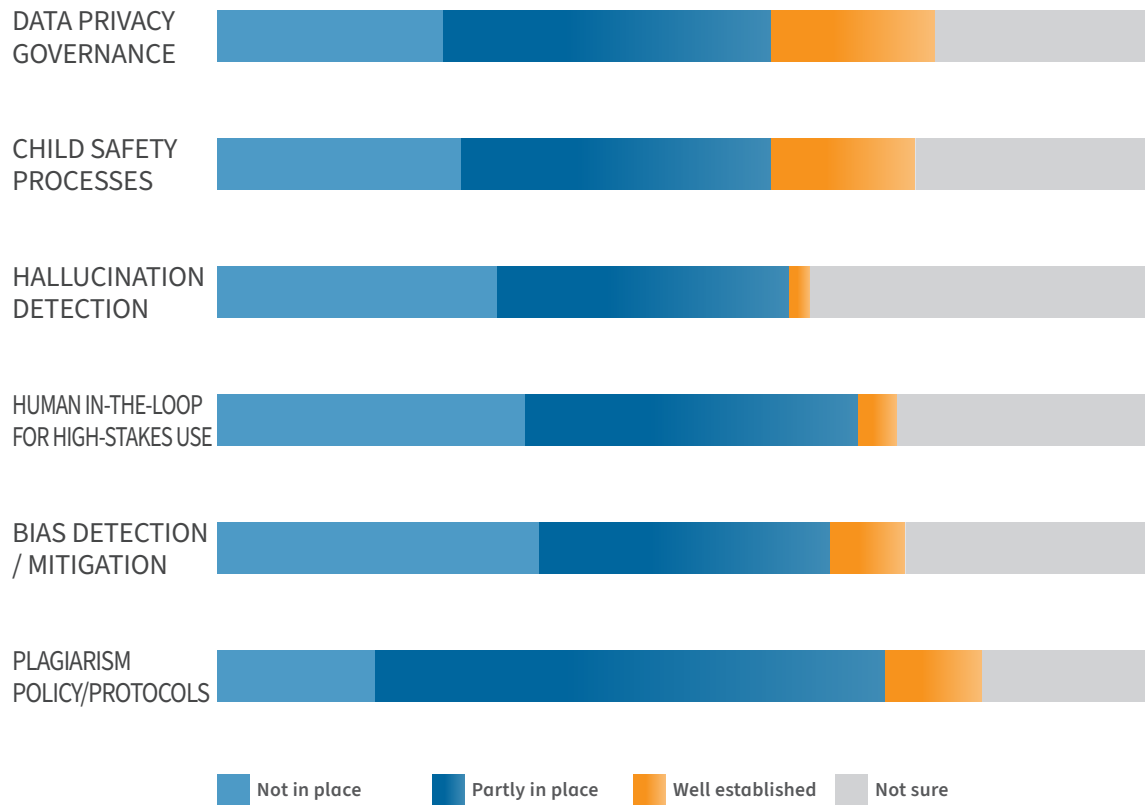


Impacts of AI on learning resources

70% of respondents said that the impact of AI is low or moderate, while 11% are already experiencing high impact.

As to where AI is finding a role, responses reveal a relatively even spread across a number of key areas, the most popular of which being teacher materials, followed by translation capabilities. Adaptive practice and accessibility supports were highlighted and on the preparation side, lesson planning and reporting were significant too.

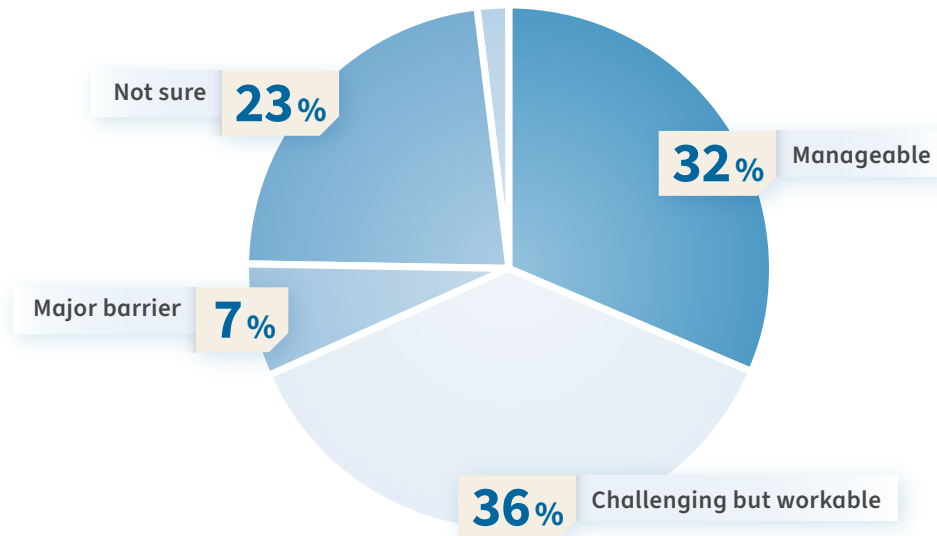
ABOUT AI GOVERNANCE PRACTICES



AI governance practices

There are many governance practices mandated or advised by governments around the world. From data privacy to human-in-the-loop advice, from detection of hallucinations to plagiarism protocols. Survey results show that AI governance practices are largely not in place or partly in place.

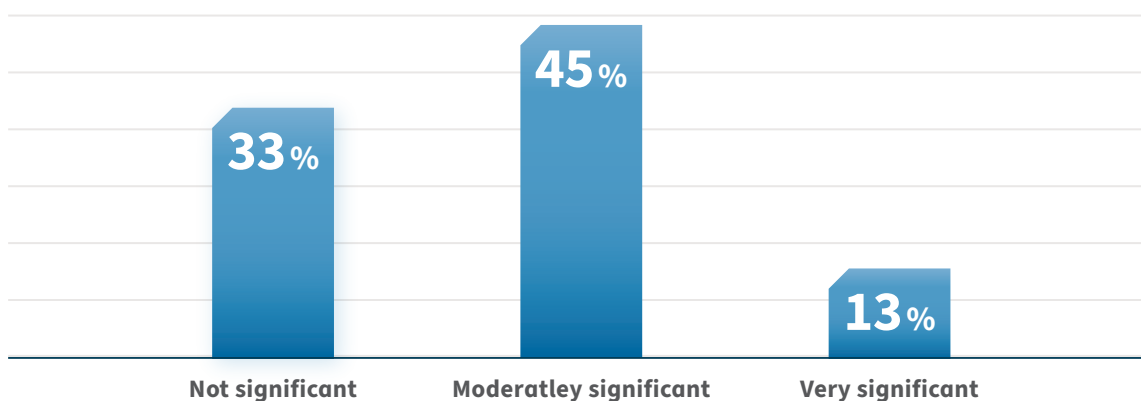
DATA-PRIVACY REQUIREMENTS FOR DIGITAL LEARNING RESOURCES



Data privacy

The data privacy requirements on digital resources places responsibilities on publishers. But two thirds of respondents reported that these were manageable, with less than 7% suggesting they were major obstacles to digital progress.

HOW SIGNIFICANT IS SUSTAINABILITY



Sustainability

Sustainability issues are omnipresent in publishing. Over 50% of respondents maintain that sustainability is moderately or very significant to their business. Key sustainability issues are spread across the board, from managed forestry to solvent free ink products, from re-use policies to accessibility. No one issue dominates.

Finally, we asked publishers and their association representatives to list the most important force reshaping the learning resources market. The most common include technology, budgetary constraints, changing educational institutional landscapes, and Government interference.

What are the most important force reshaping the learning resources market?

- Increased adoption of online and blended learning models
- AI-enabled tools for personalised, adaptive learning
- Budgetary constraints / Government interference
- OERs in some countries seen as less costly than resources made by professionals
- Schools becoming more 'controlled' by digital ecosystems.

5. APPENDICES

FULL QUESTIONNAIRE AS FIELDDED

EDUCATIONAL PUBLISHERS FORUM GLOBAL SURVEY

The IPA Educational Publishers Forum are undertaking this international survey to establish a global picture of the current environment in educational publishing for the schools market (ages 4–18).

The survey focuses on curriculum-aligned teaching and learning resources in print and digital formats and is organised under:

- Education market profile and conditions;
- Technology;
- Data governance and compliance;
- Sustainability, accessibility and inclusion.

All respondents will receive a summary of the findings. The survey will take approximately 10 minutes to complete.

This survey is hosted by the International Publishers Association. Any public communication on the results of the survey will be aggregated and anonymised. Respondents' contact information, if provided, will not be used for any other purposes other than those related to this survey. Data will be stored with the International Publishers Association (Switzerland).

By clicking “Next,” you confirm that you have read this information and agree to participate.

1. Which best describes the organisation you are responding on behalf of? *

- ☐ Publisher - single country (operations in one country only)
- ☐ Publisher - multinational (operations in two or more countries)
- ☐ A national publishers association
- ☐ Other (free text)

2. Name one education market (ages 4–18) to describe in this survey. This may be either an entire country or one sub-national area (for example, a state, province, or region): All subsequent answers should refer only to this market. *

3. In your chosen market, who primarily creates/develops the learning resources used in schools (ages 4–18)? *

- ☐ Commercial publishers
- ☐ Government ministry/agency
- ☐ Curriculum/standards or qualifications body
- ☐ Local authority, municipality or district
- ☐ Schools/teachers
- ☐ EdTech companies/platforms
- ☐ NGOs/OER communities/non-profits
- ☐ Other (free text)

4. In your chosen market, which description best fits the adoption and procurement model of learning resources in publicly-funded schools? *

- ☐ Open choice, no mandatory approval
- ☐ Approved list from which schools choose
- ☐ Central adoption/procurement
- ☐ State-owned provider is the dominant supplier
- ☐ Other (free text)

5. Which of the following best describes the main funding model for learning resources in publicly-funded schools in your chosen market? *

- ☐ Publicly-funded
- ☐ Parents/guardians purchase pupil learning resources
- ☐ Parents/guardians rent learning resources from schools
- ☐ Other (free text)

6. In your chosen market, what is the dominant price dynamic for learning resources used in schools?*

- ☐ Open and competitive market pricing
- ☐ Government-regulated pricing
- ☐ Other (free text)

7. Over the past three years, what is the trend in spending on learning resources for the school market in your chosen market? *

☐ Increasing

☐ Decreasing

☐ Stable

☐ Not sure

8. In your chosen market, how would you rate the level of collaboration between government/ministries and commercial educational publishers? (1 = low, 5 = high)*

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

9. Please briefly describe one or more successful examples of public-private partnerships in educational publishing in your chosen market, including the partners involved and why the example(s) were successful. For example, these might include joint working groups, think tanks, or other forums in which representatives from public bodies and private industry collaborate regularly. *

10. In your chosen market, what are the main barriers to public-private collaboration between government and commercial educational publishers?

11. In relation to learning resources for schools in your chosen market, how much do you agree or disagree with each statement? *

	Disagree	Neither Agree nor Disagree	Agree	Don't Know	Not Applicable
Public-funding is used to create or support Open Educational resources (OER).					
Public-funding for OER affects budgets available for commercial content.					
Copyright exceptions for educational use (such as copying for classroom instruction) affect sales of paid learning resources					
Unauthorised copying/piracy of learning resources is a significant problem					
Copyright enforcement is effective (e.g. compliance monitoring, remedies, penalties).					
Availability of second-hand learning resources affects sales of new learning resources.					

12. Digital learning resource adoption in your chosen market, is best described as:*

☐ Slow/emerging

☐ Rapidly developing

☐ Reverting to print

☐ Stable growth

☐ Near saturation

13. Compared with three years ago, how open are teachers in your chosen market to using digital learning resources? *

	Much less open	Somewhat less open	About the same	Somewhat more open	Much more open	Not sure
Ages 4-11						
Ages 12-18						

14. In your chosen market, what share of classrooms have reliable internet: *

- ☐ 0% (none)
 ☐ 51-75%
- ☐ 1-25%
 ☐ 76-100%
- ☐ 26-50%
 ☐ Not sure

15. In your chosen market, what percentage of pupils are using an individual digital device in class weekly? *

	0%	1-25%	26-50%	51-75%	76-100%	Not sure
Ages 4-11						
Ages 12-18						

16. In your chosen market, what is the main digital device ownership model in schools?

- ☐ Public-funding provides schools with devices
- ☐ Corporate sponsorship provides schools with devices
- ☐ Parents/guardians purchase devices
- ☐ Parents/guardians rent devices
- ☐ Don't know
- ☐ Not applicable
- ☐ Other (free text)

17. In your chosen market, what share of schools actively use a Learning Management System (LMS)? Examples: Canvas, Moodle, Google Classroom, Microsoft Teams for Education, Blackboard.

- | | | | |
|------------------------------------|---------------------------------|-------------------------------------|-----------------------------------|
| ☐ 0% (none) | ☐ 26–50% | ☐ 76–99% | ☐ Not sure |
| ☐ 1–25% | ☐ 51–75% | ☐ 100% (all) | |

18. In your chosen market, what are the top three drivers of digital learning resource adoption in this market? *

- | | |
|---|--|
| ☐ Teacher efficiency and time-saving | ☐ Availability of high-quality curriculum-aligned content |
| ☐ Assessment and feedback | ☐ Dedicated funding or incentives |
| ☐ Personalisation and differentiation | ☐ Cost advantages compared with print |
| ☐ Student engagement and motivation | ☐ Digital OER |
| ☐ Support for learners with disabilities and accessibility needs | ☐ AI-enabled capabilities |
| | ☐ Other (free text) |

19. In your chosen market, what are the top three impediments to digital learning resource adoption in this market? *

SELECT 3 OPTIONS.

- | | |
|---|--|
| ☐ Unreliable internet connectivity | ☐ Data privacy or compliance requirements |
| ☐ Insufficient devices | ☐ Interoperability issues |
| ☐ Home access gap | ☐ Lack of local-language content |
| ☐ Insufficient teacher training | ☐ Assessment rules limiting use |
| ☐ Limited teacher time | ☐ High total cost of ownership |
| ☐ Inadequate IT support | ☐ Complex procurement |
| ☐ School leadership resistance | ☐ Mandated state platforms |
| ☐ Parental resistance | ☐ Other (free text) |

20. In your chosen market, what impact has AI had so far on the learning resources market? *

- | | |
|--|---|
| ☐ No impact | ☐ High impact |
| ☐ Low impact | ☐ Very high impact |
| ☐ Moderate impact | ☐ Not sure |

21. Where is AI currently being used in schools in your chosen market?

(Select all that apply) *

- ☐ Teaching and learning material creation
- ☐ Adaptive practice and tutoring
- ☐ Language translation
- ☐ Content differentiation
- ☐ Accessibility and assistive support
- ☐ Curriculum alignment and standards mapping
- ☐ Learning analytics and progress insights
- ☐ Lesson planning and documentation
- ☐ Formative assessment and feedback
- ☐ Summative assessment and feedback
- ☐ Not applicable
- ☐ Other (free text)

22. How established are AI governance practices in your chosen market? *

	Not in Place	Partly in Place	Well Established	Not Sure	Not Applicable
Data privacy governance					
Child-safety processes					
Academic integrity					
Human in-the-loop requirements					
Bias detection and mitigation					
Hallucination detection and mitigation					

23. How workable are dataprivacy and compliance requirements for the creation/development of digital learning resources in your chosen market? *

- ☐ Manageable: Dataprivacy and compliance requirements are clear and can be implemented within normal product design and development processes.
- ☐ Challenging but workable: Requirements add complexity, cost, or time to development, but compliant digital resources can still be created and maintained.
- ☐ Major barrier: Requirements significantly constrain or delay the creation and development of digital learning resources, or deter innovation.
- ☐ Not sure
- ☐ Not applicable

24. In your chosen market, how significant is sustainability (environmental and social) in decisions about the creation, adoption, or procurement of learning resources for schools? *

- | | |
|---|---|
| ☐ Not significant | ☐ Very significant |
| ☐ Slightly significant | ☐ A key determining factor |
| ☐ Moderately significant | ☐ Not sure |

25. Which sustainability considerations currently matter most in this market? (Select up to three) *

- | | |
|---|---|
| ☐ None | ☐ Ethical supply chains |
| ☐ Environmental impact of print production | ☐ Alignment with sustainability goals |
| ☐ Longevity and reuse | ☐ Sustainability reporting or labelling requirements |
| ☐ Digital vs print trade-offs | ☐ Not sure |
| ☐ Accessibility and inclusion | ☐ Other (free text) |

26. In your chosen market, what is the most important force currently reshaping the learning resources market?

27. May we contact you for a short follow-up interview? *

- ☐ Yes
☐ No

28. Please provide your email address below *

29. To receive the results of the survey, please provide your email address below:

THANK YOU

Thank you for taking the time to answer our questions.



INTERNATIONAL PUBLISHERS ASSOCIATION

internationalpublishers.org • [@IntPublishers](https://twitter.com/IntPublishers)