



IPA EPF Global Survey of Educational Publishing.

About IPA EPF (Educational Publishers Forum)

- ❑ Delegates from educational publishers and national publisher associations from about 50 countries
- ❑ Share experiences regarding the evolution of learning resources:
 - ❑ The application of technology
 - ❑ Developments in pedagogy
 - ❑ Different Government policies across the world
 - ❑ Links with UNESCO, WIPO, OECD, World Bank etc.
- ❑ Relates only to school market (ages 5-18)

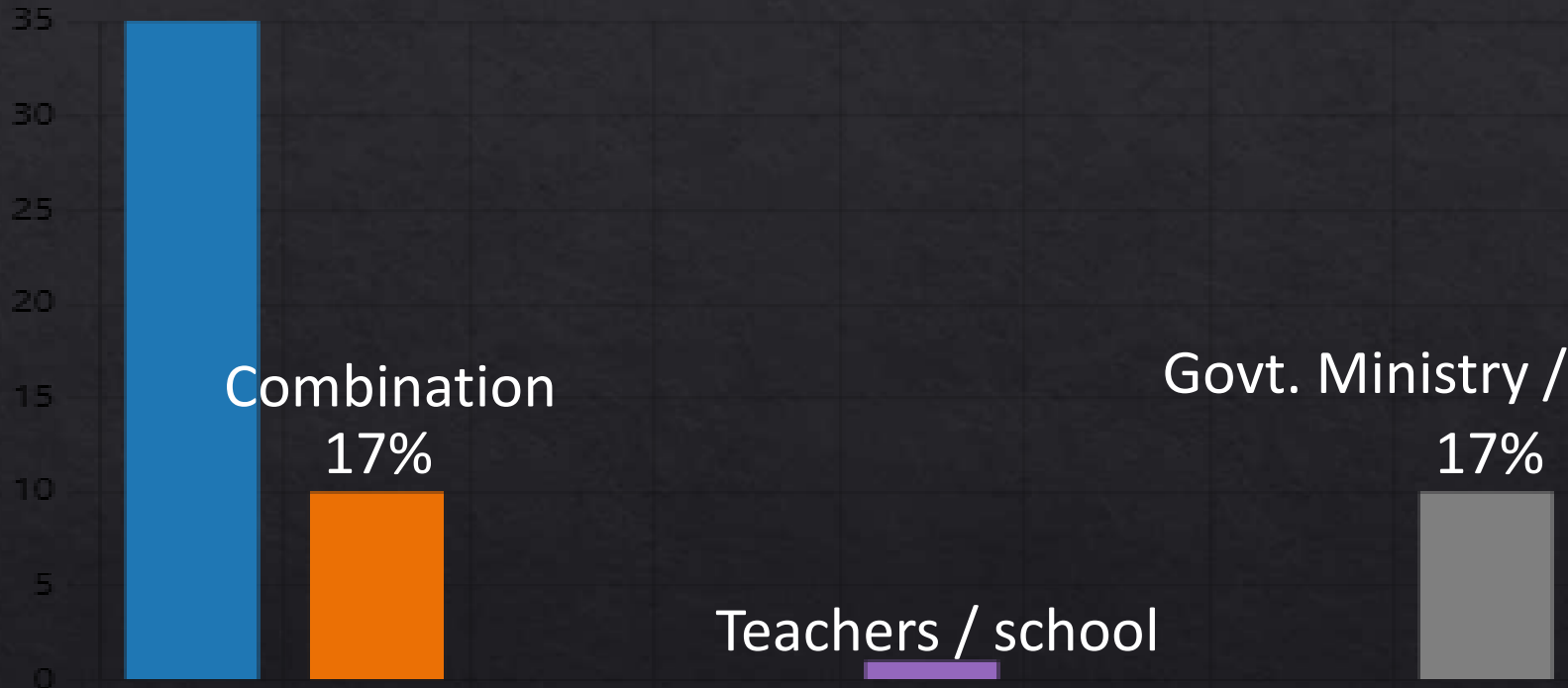
Survey Respondents

- ❑ 56 completed surveys from 36 countries
 - ❑ The Publishers Association: 46%
 - ❑ A publisher of that country: 48%
- ❑ Timing Spring 2026
- ❑ Relates only to school market (ages 5-18)

Learning resources...who primarily creates develops them?

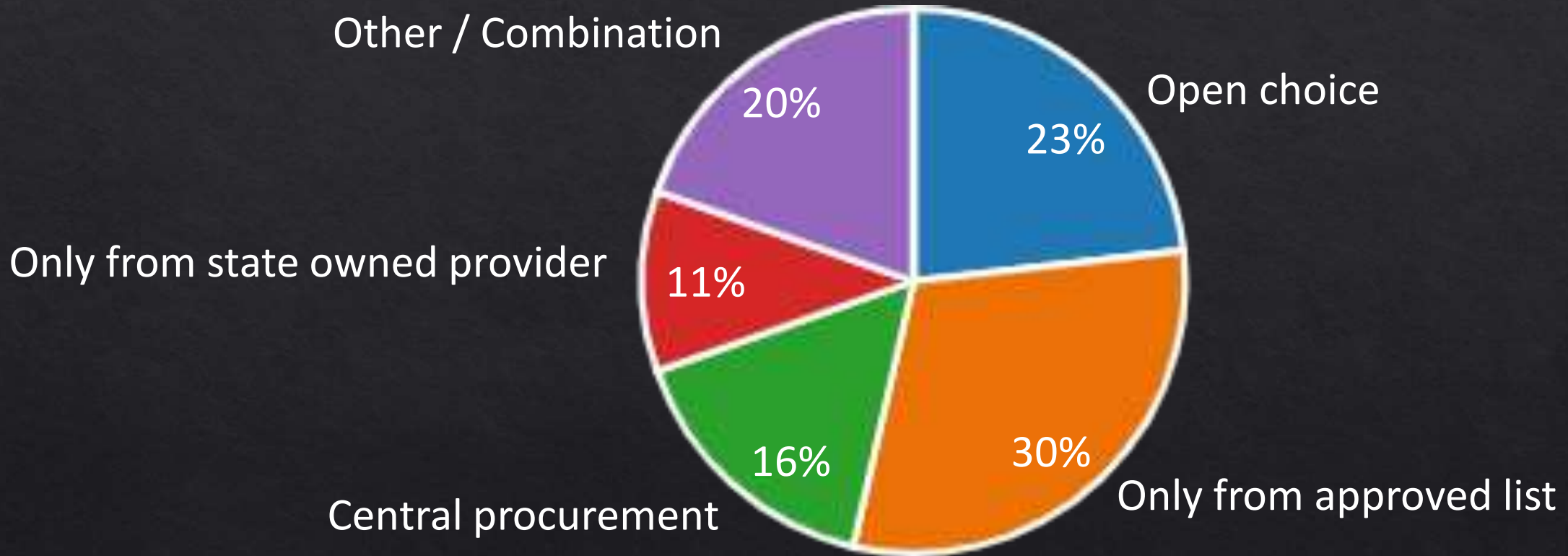
Commercial publishers only

63%

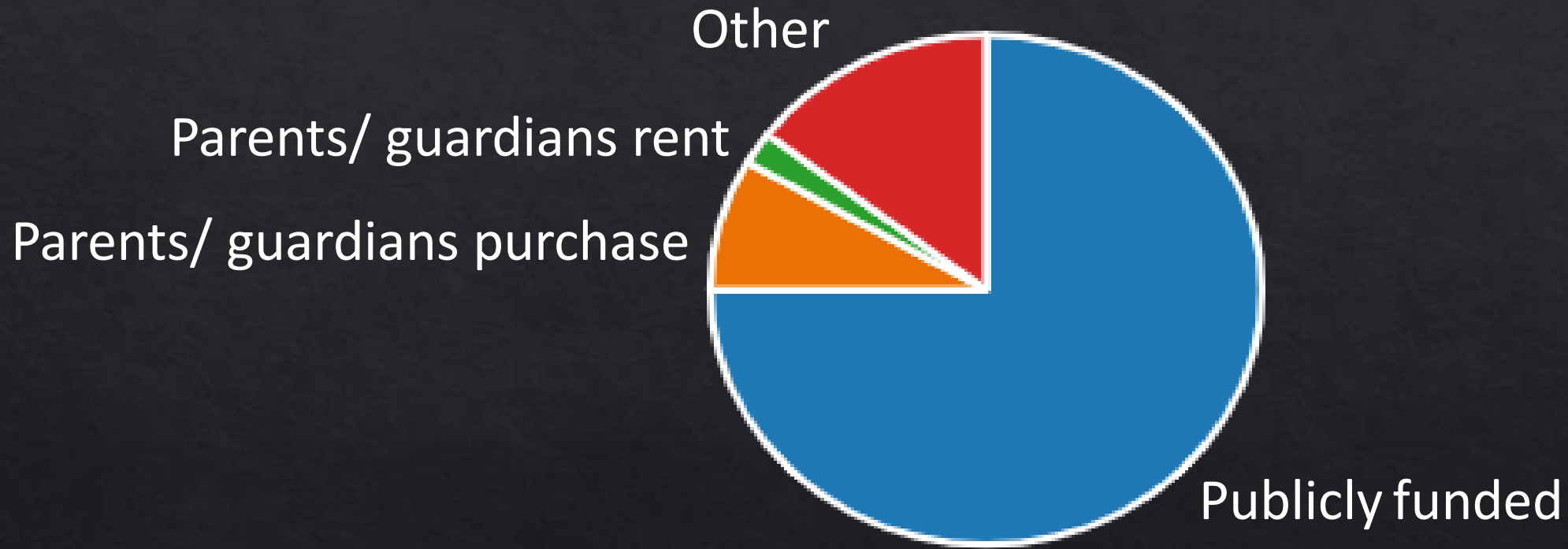


Commercial publishers plus Ministry = 80%

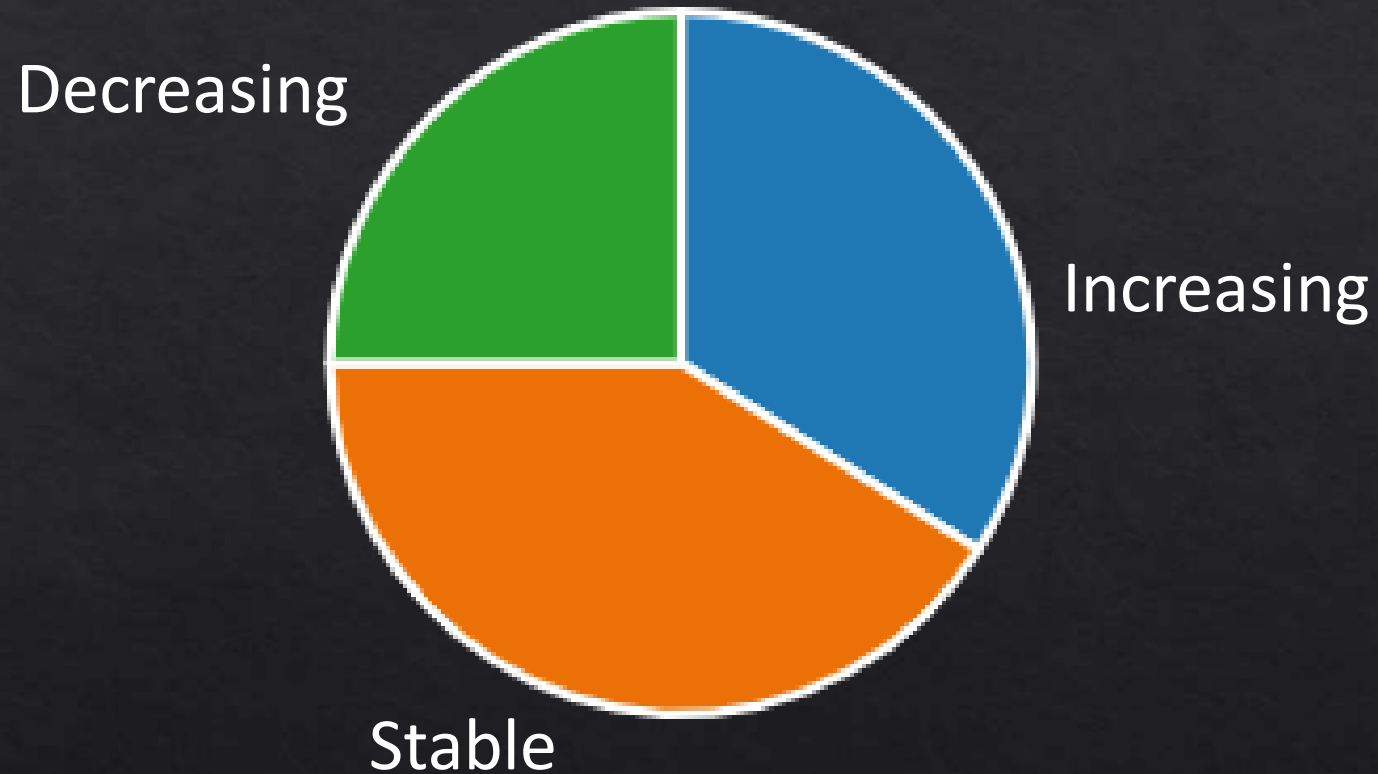
What is the adoption / procurement model?



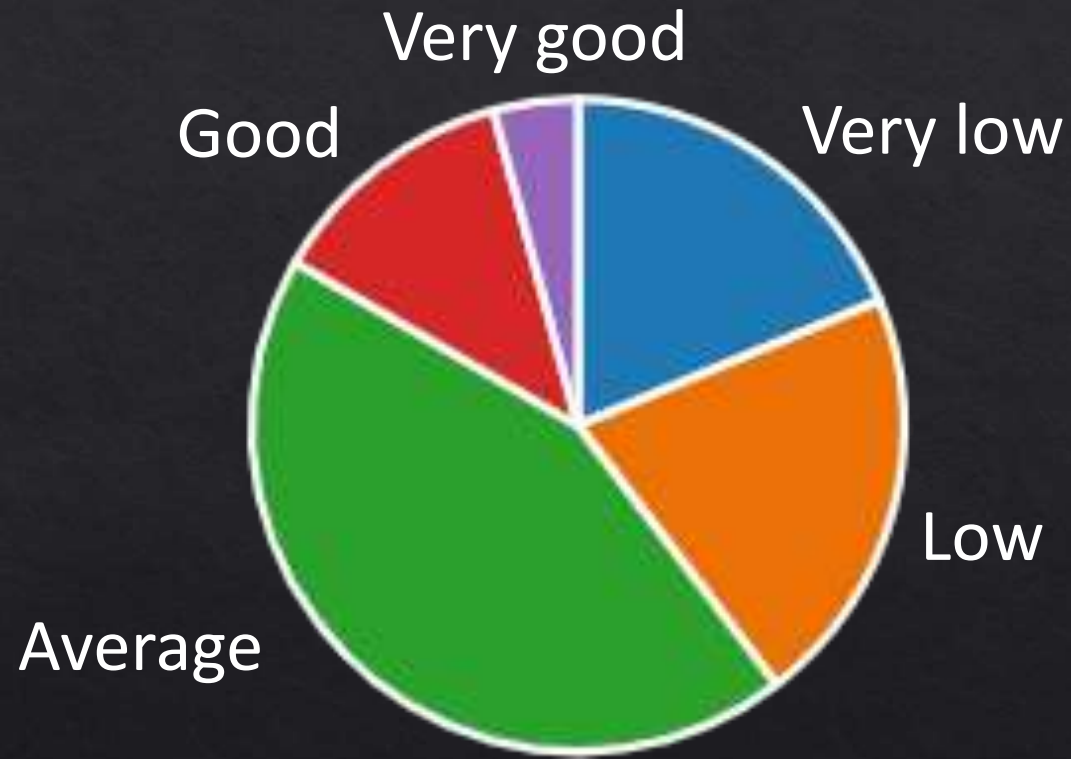
How are learning resources funded



What is the spending trend on learning resources?



Rate the collaboration between Ministries and publishers



Examples of success in public-private partnerships



LESOTHO:

Three leading publishers, Orion, Geneza and Ranok cooperate with the Education Ministry, to pilot test textbooks and digital supplements in schools has been introduced.

The World Bank helped the Government of Lesotho to source literacy materials in Sesotho (local language) to help improve literacy amongst the least performing public primary schools

Examples of success in public-private partnerships



INDIA:

The collaboration between the Ministry of Education, NCERT, and multiple private technology and content partners through the DIKSHA platform, which provides curriculum-aligned digital learning resources for schools nationwide.



BOSNIA HERZEGOVINA:

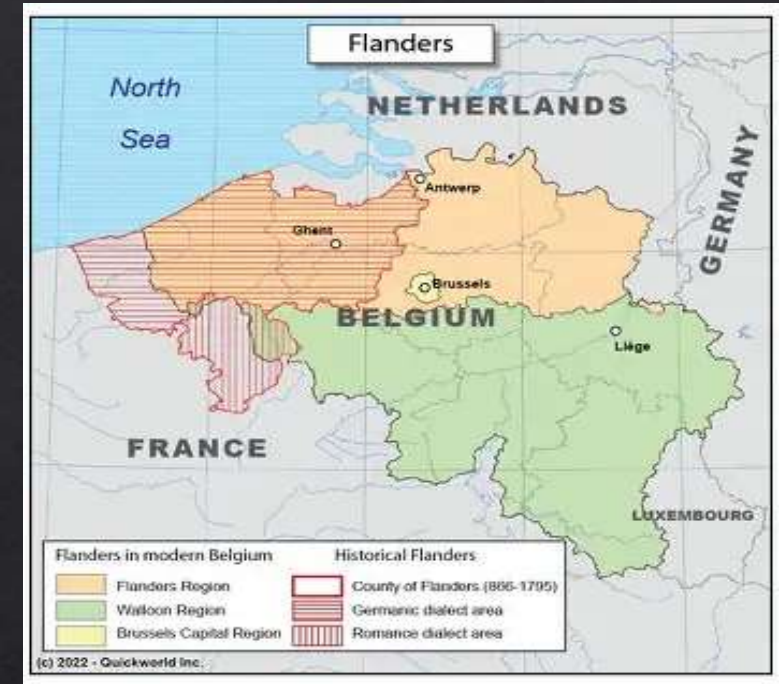
Cooperation between publishing houses and pedagogical institutes for the testing of new teaching materials and digital solutions, allowing materials to be adapted to the real needs of teachers and students before wider implementation.

Examples of success in public-private partnerships



JAMAICA:

The Education Ministry has partnered with BookFusion, a Caribbean-based e-learning company to provide inclusive learning materials. The platform features multi sensory eBooks for students with and without disabilities



FLANDERS (BELGIUM):

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.

Examples of success in public-private partnerships



FRANCE:

Educational publishers have a strong working relationship with the organisation in the Education Ministry in charge of reforming the curriculum. This helps publishers understand the thinking and publishers are asked for their insights on matters regarding education



BRAZIL:

The Textbook and Learning Materials Program (PNLD) involves the Education Ministry, the National Fund for Development, publishers and schools. The Government defines criteria and evaluates materials; publishers compete for approval to the list. This combines public quality assurance with private innovation and ensures equitable access to high-quality learning resources.

Main barriers to collaboration in public-private partnerships



ESTONIA:

Publishers not seen as strategic implementers of curricula...more a delivery mechanism for learning materials. High political desire to use AI. Focus for resources is dominated by cost, not value. It is rare for Ministers to stay at one position for more than five years - there is a lack of consistency of knowledge and understanding our sector.



SLOVENIA:

Publishers in Slovenia are not treated as equal partners in school politics. We are not included in any group for curriculum or textbook policy. Any meetings at the MOE are mostly informative, not cooperative. New curricula are being introduced in which we did not participate.

Main barriers to collaboration in public-private partnerships



PORTUGAL:

By the time the Government understands the sector's dynamics, its term ends, forcing a reset. There is a belief that teacher-created materials are superior to 'standardised' commercial resources. Public sector distrust about private profit in public education limits trust. Curricula revisions clash with the pace private sector needs to deliver quality resources.

Main barriers to collaboration in public-private partnerships



NEW SOUTH WALES AUSTRALIA:

Funding for schools is increasing this year because of a change of curriculum. But for 10 years the market has been stable or backwards. We have a federated model of education, so while there is a national curriculum, territories fund their schools differently. At the system level, publishers and edtech providers are seen as 'predatory' on teachers and students. |

NEW ZEALAND:

There's a lack of communication between Government and commercial publishers about the curriculum changes taking place. No consultation with publishers or consideration about timelines needed to respond to the curriculum changes.

Quick questions...

Public-funding is used to create or support Open Educational Resources (OERs)?



Public Funding for OERs affects budgets for commercial content?

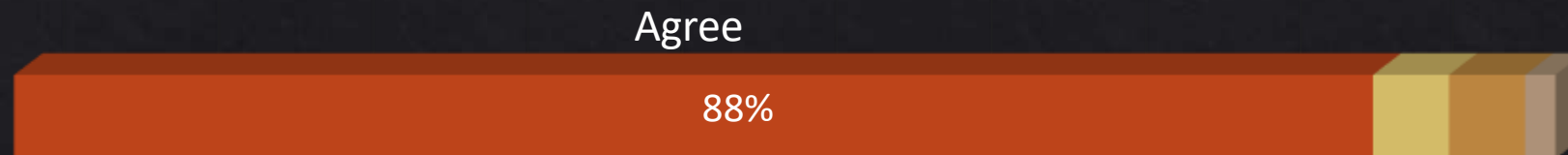


Quick questions...

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?



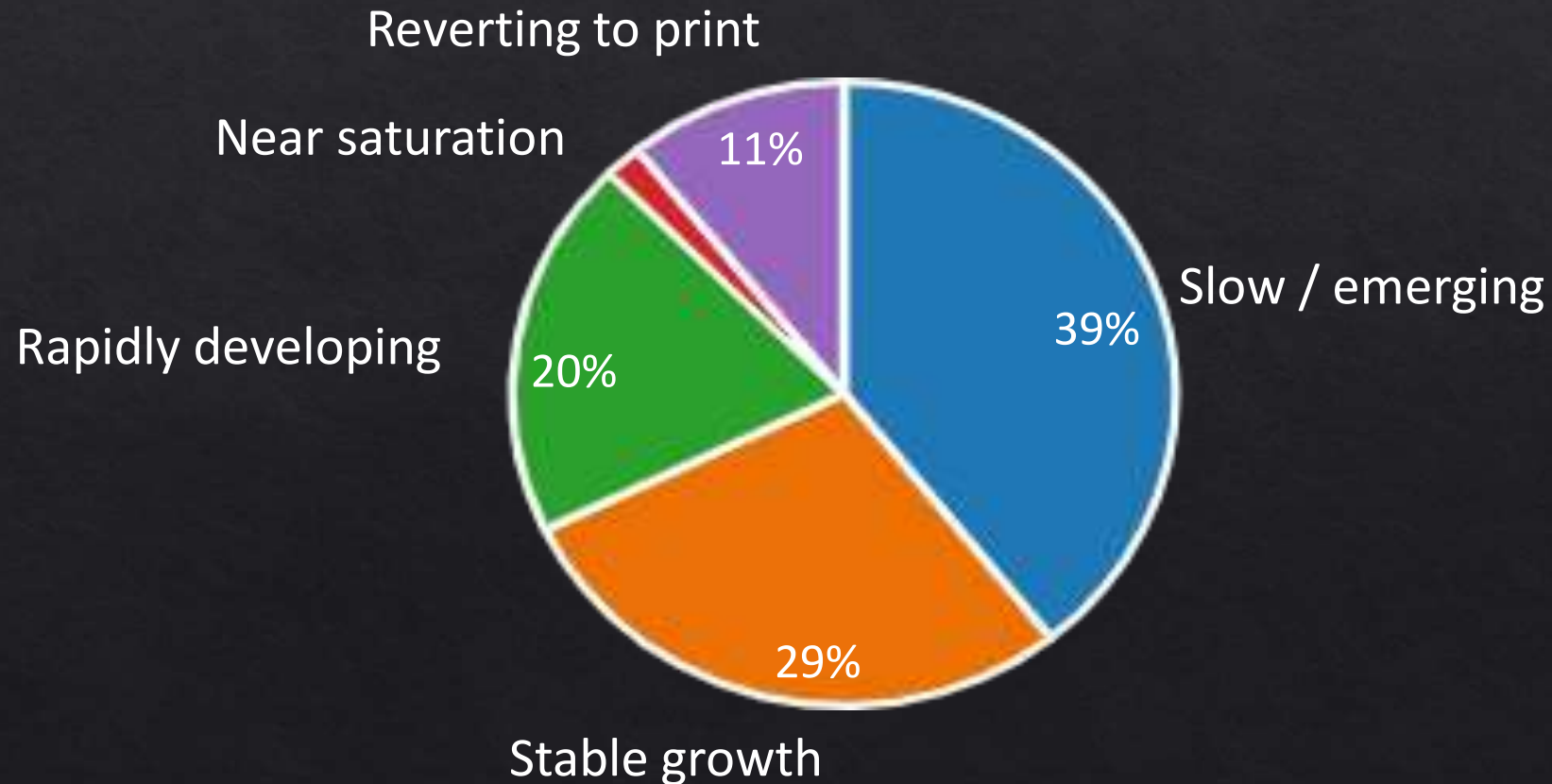
Quick questions...

Copyright enforcement is effective (e.g., compliance monitoring, remedies, penalties)?



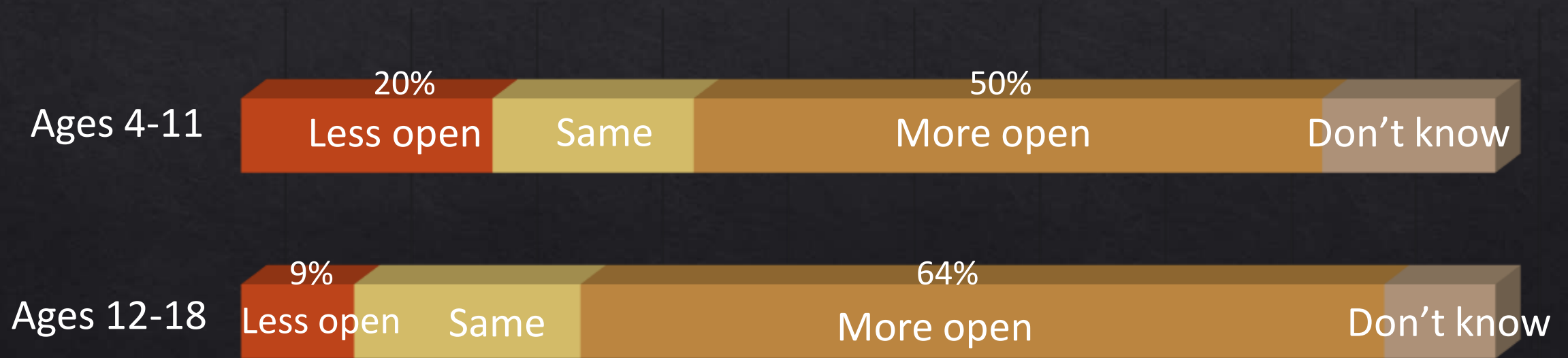
Use of technology...

Digital resource adoption is...



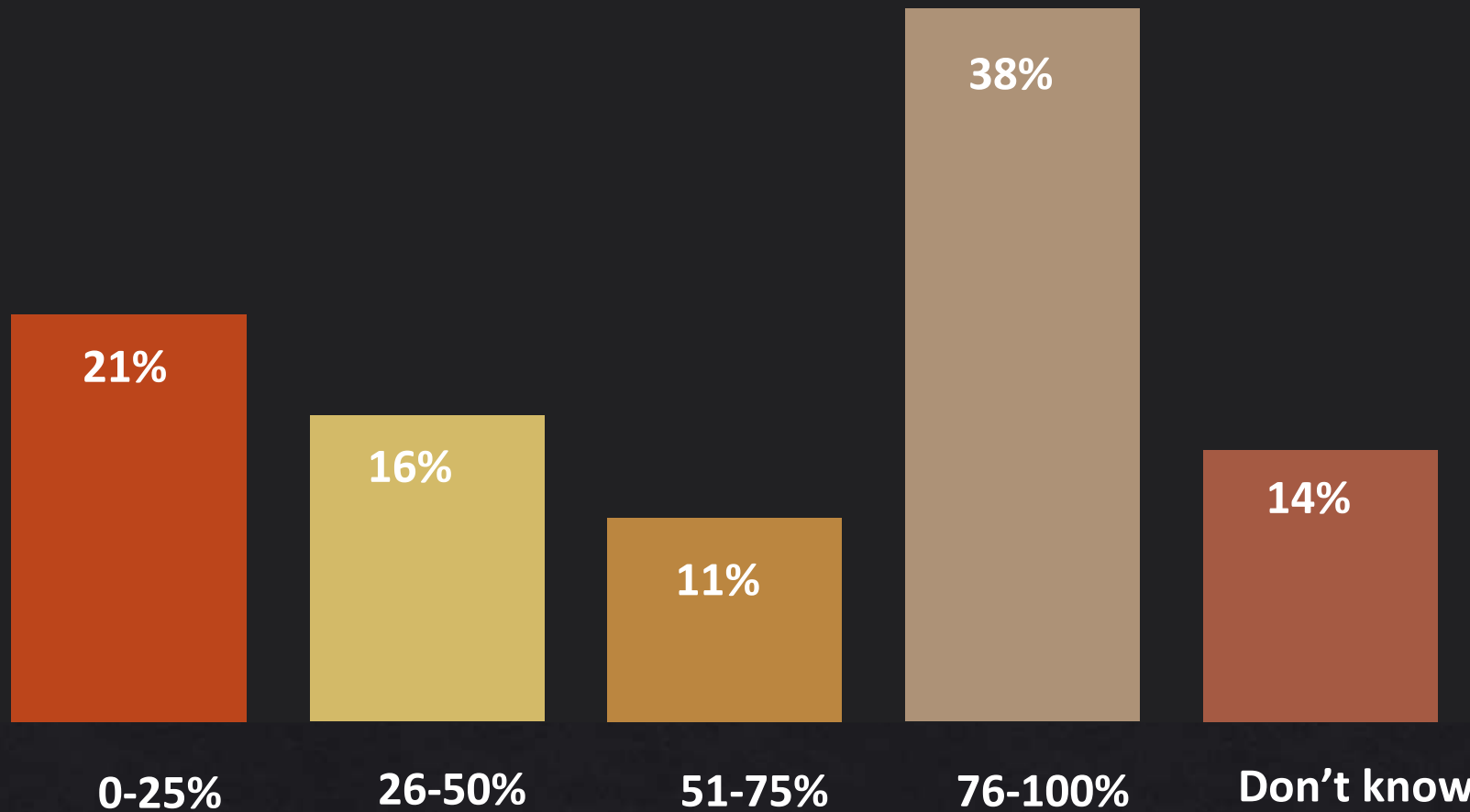
Use of technology...

Compared to three years ago, how open are teachers to using digital resources



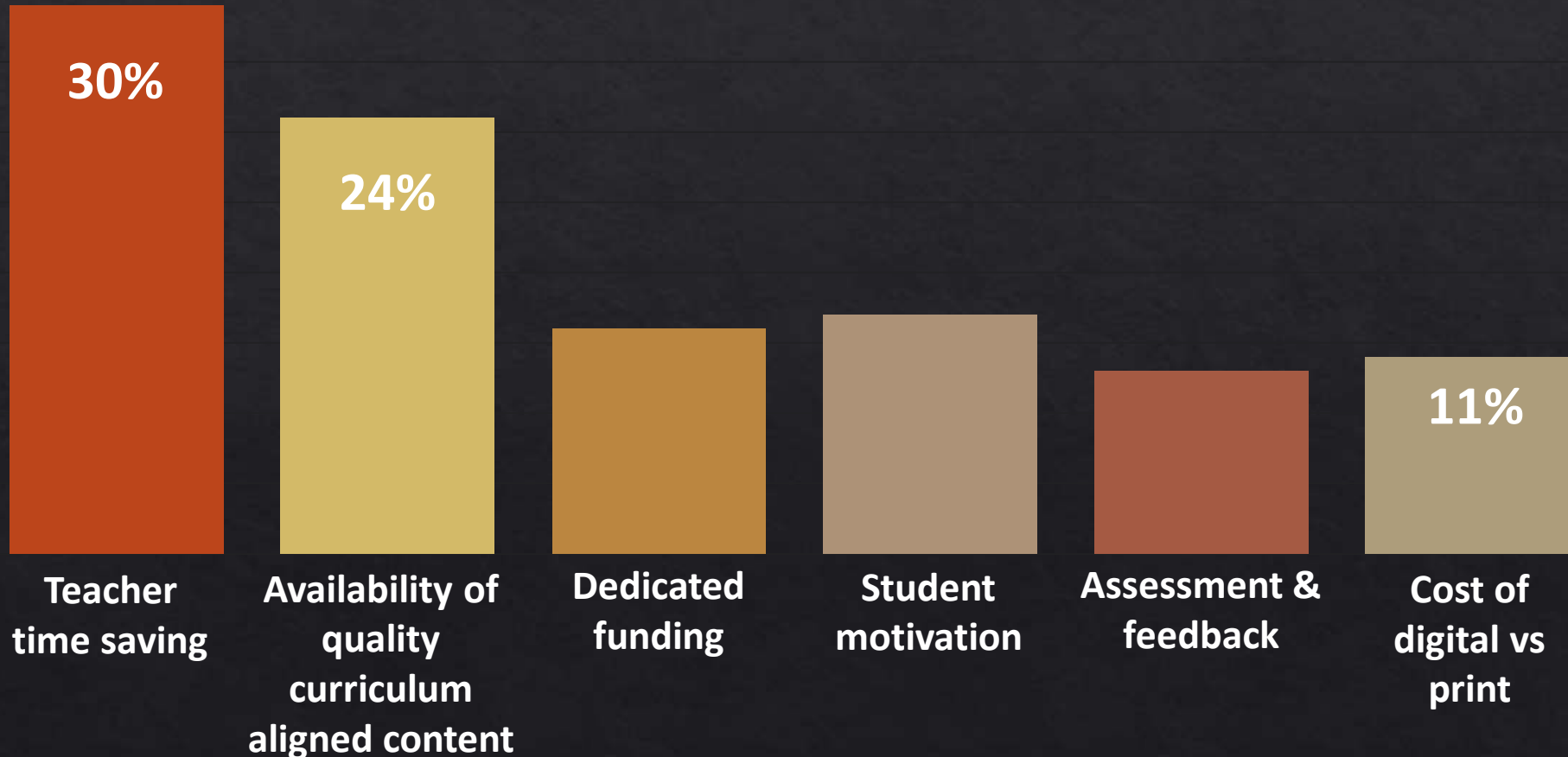
Use of technology...

What share of classrooms have reliable internet



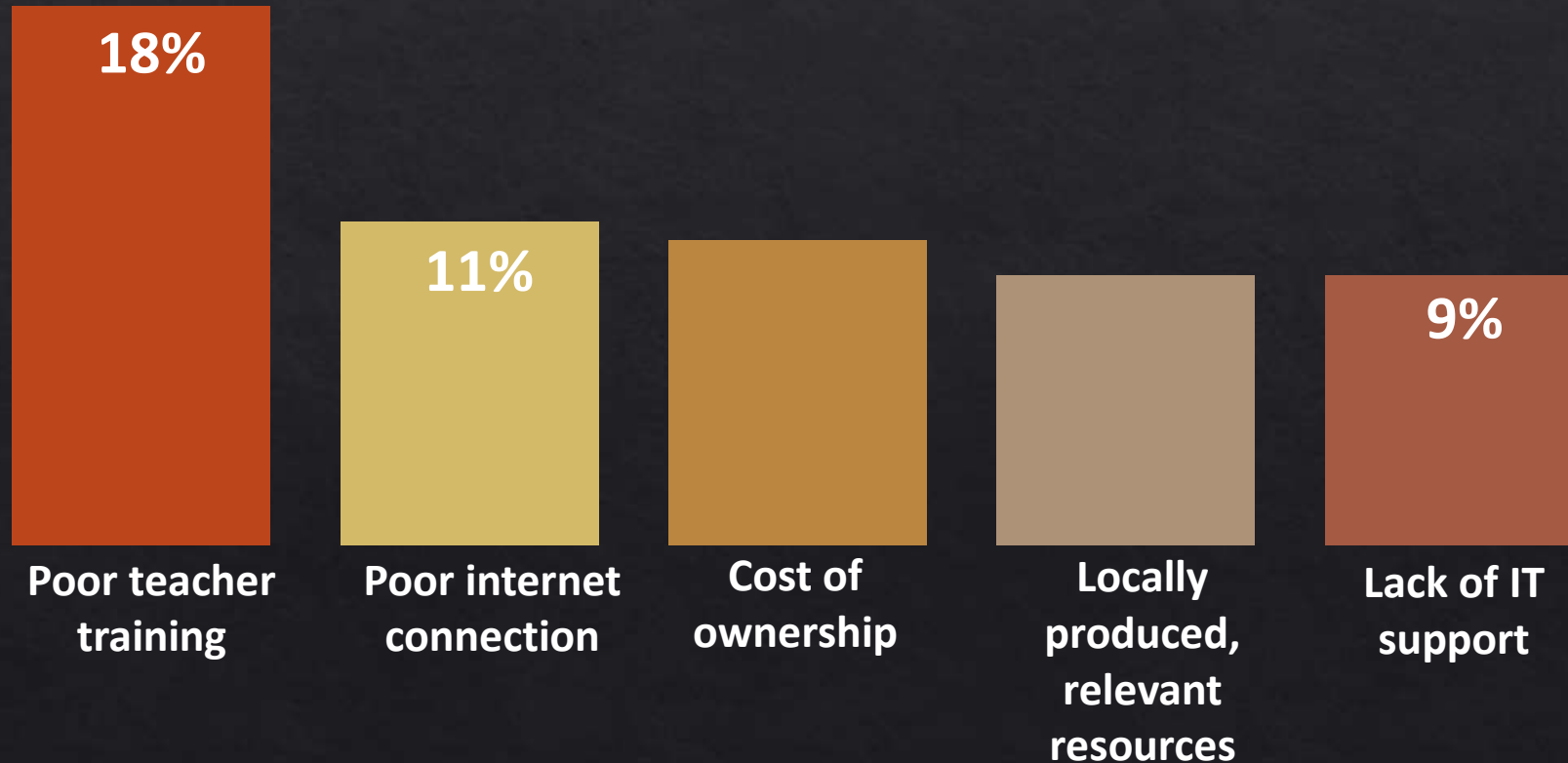
Use of technology...

Top drivers of digital learning resource adoption



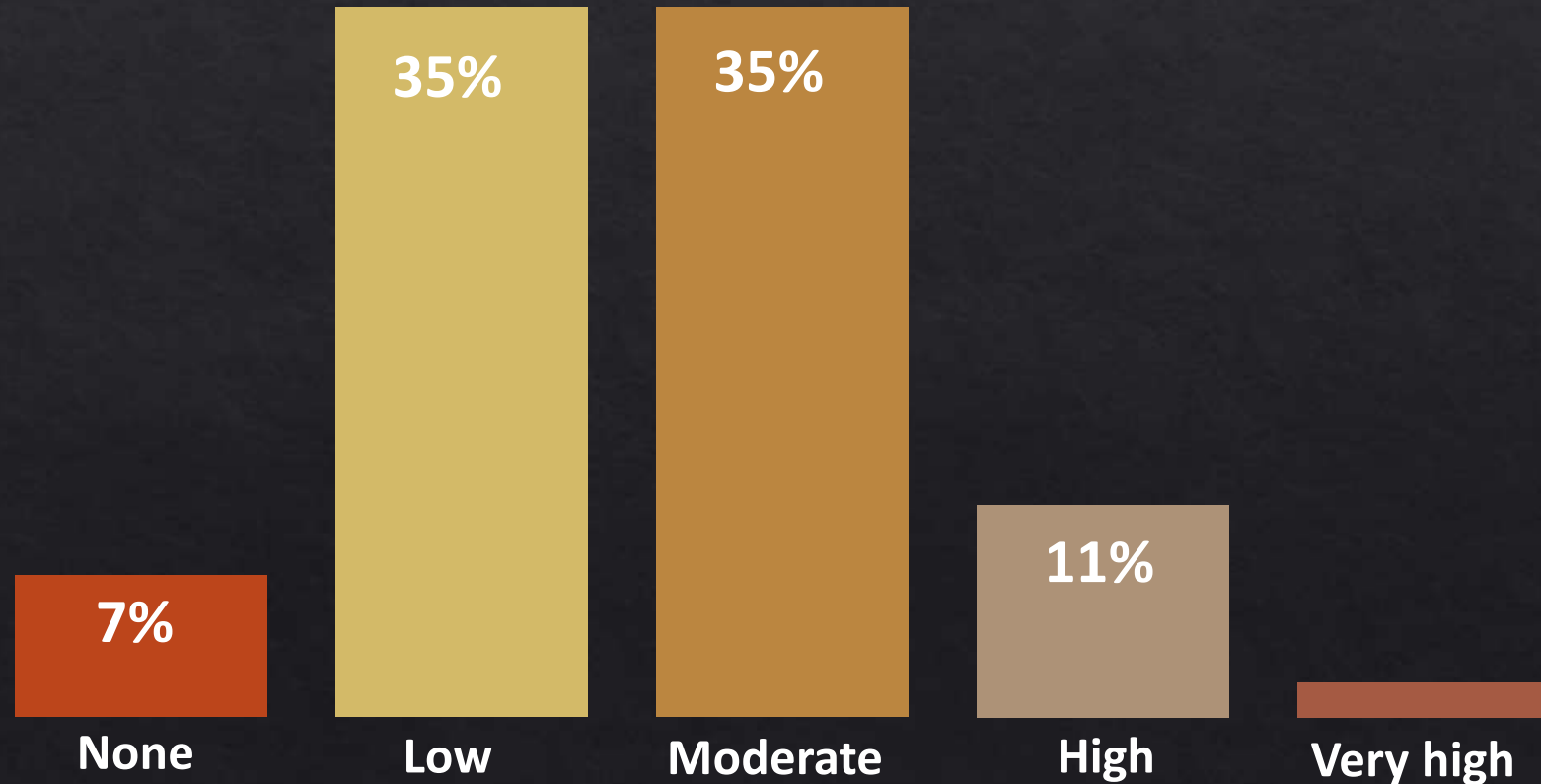
Use of technology...

Main impediments to digital learning resource adoption



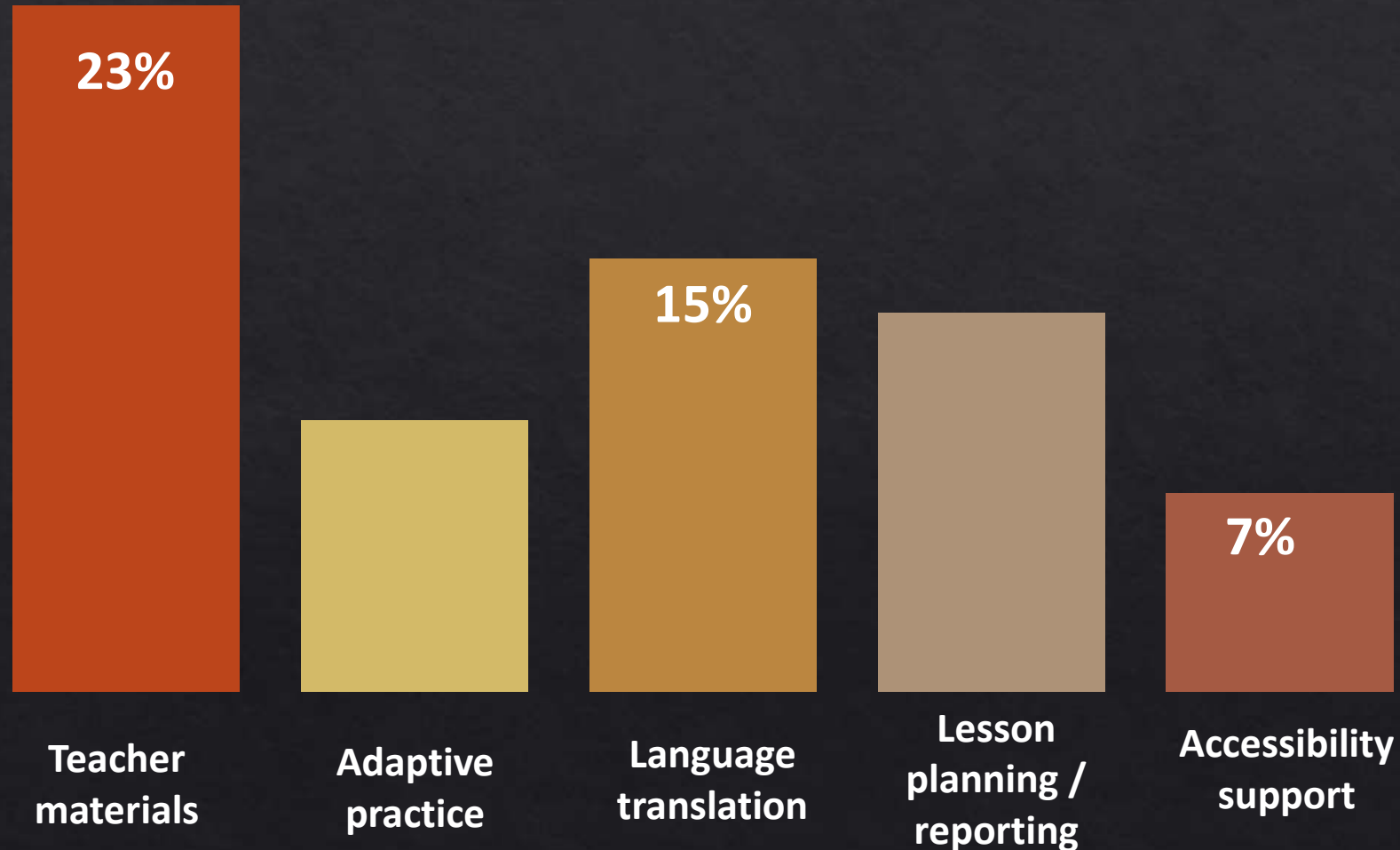
Use of technology...

Impact has AI had so far on the learning resources



Use of technology...

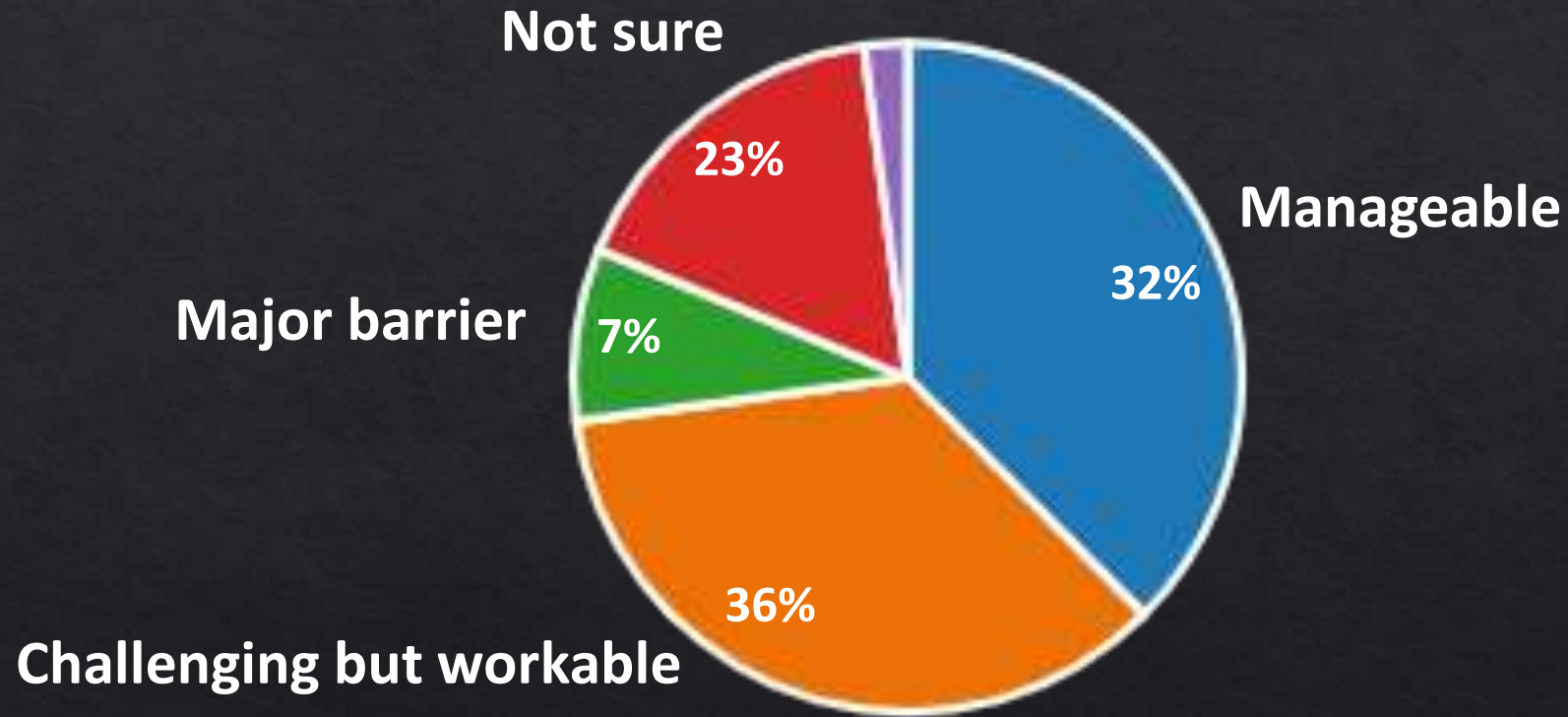
Where is AI being used in schools



About AI governance practices

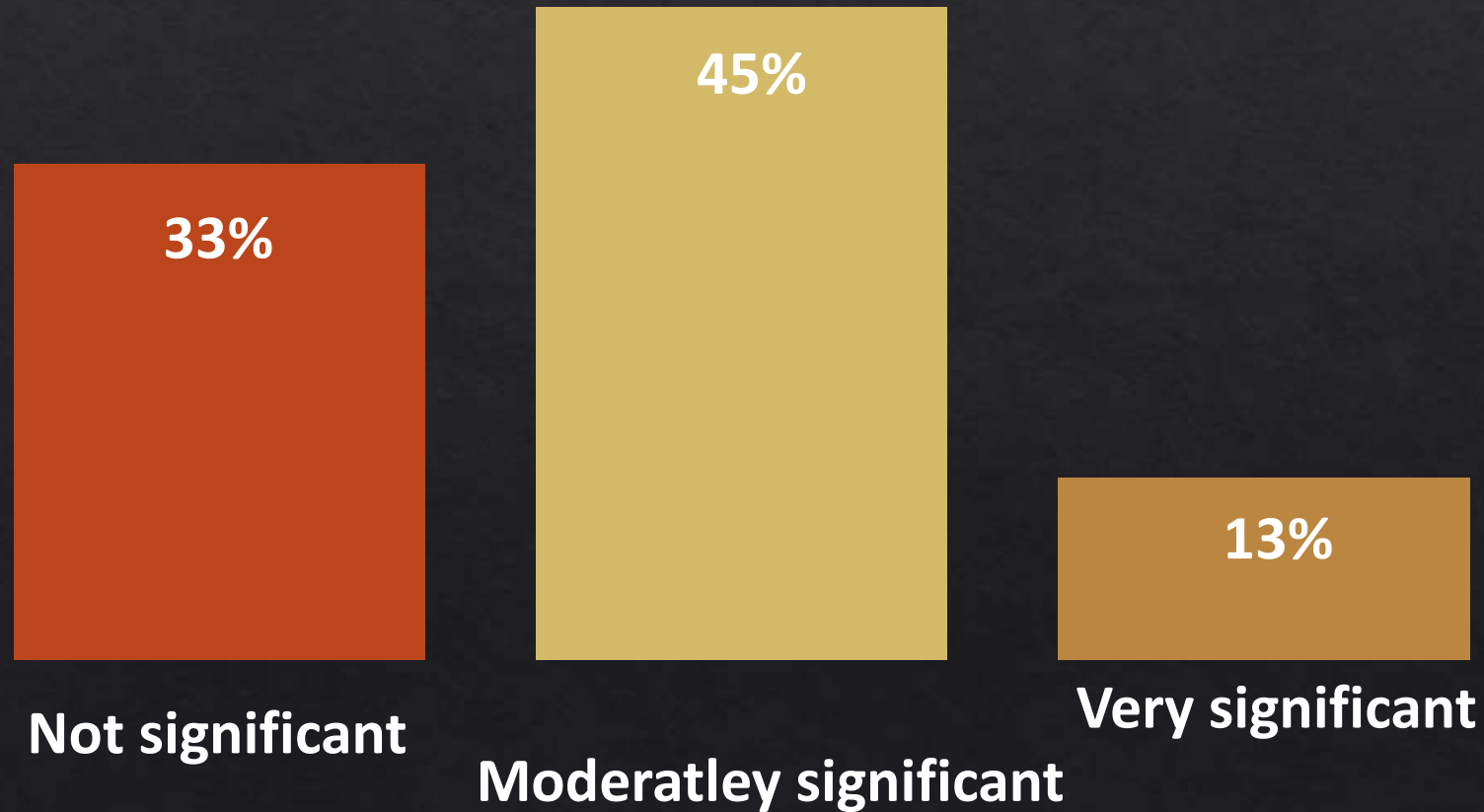


Data-privacy requirements for digital learning resources

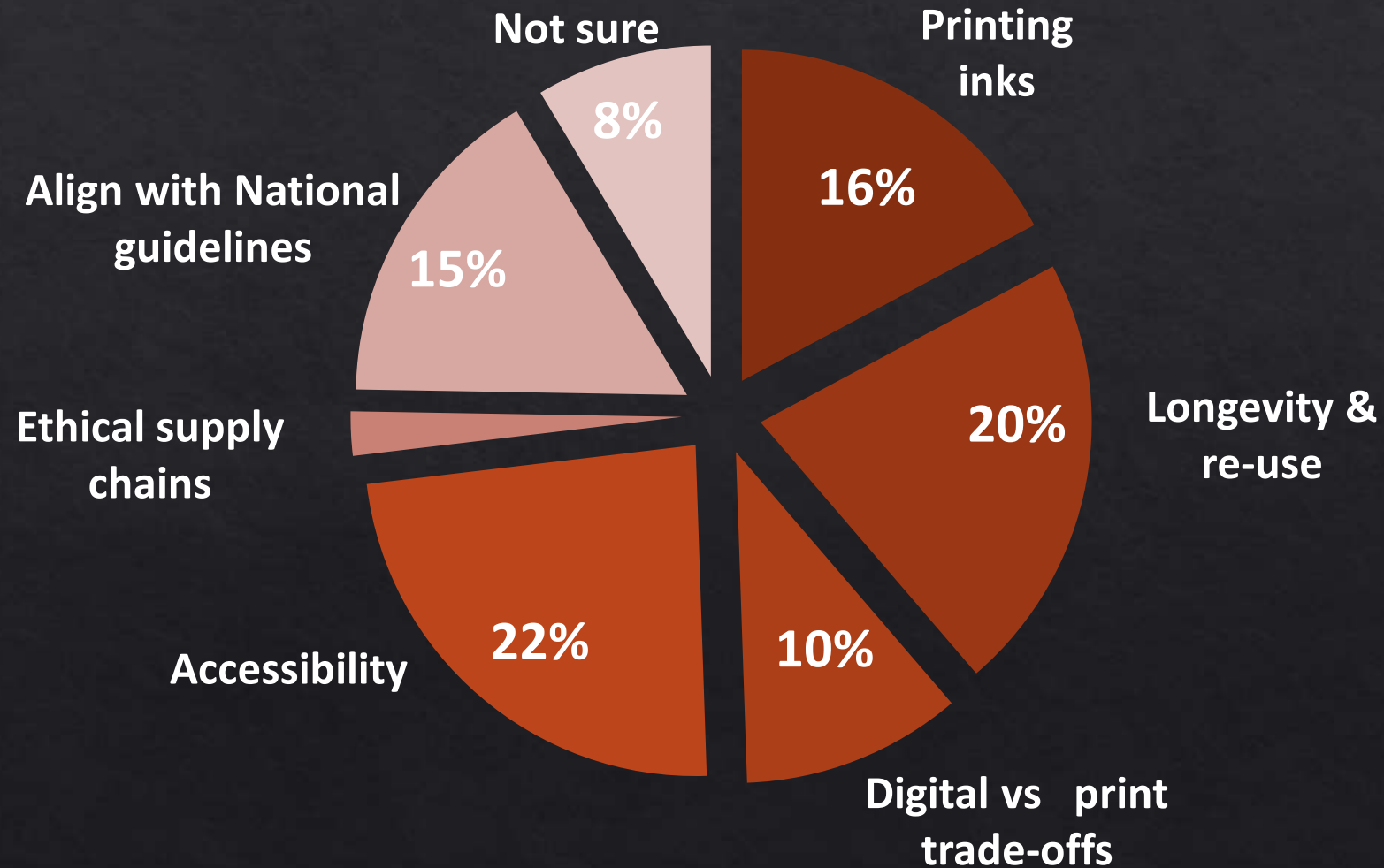


Sustainability

How significant is sustainability



Which sustainability issues matter most



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. |



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