

ACM: stop tying digital and print learning materials, and strengthen collaborations in procurement

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Summary: The market for learning materials in secondary education is not functioning properly. Publishers must stop tying digital and print learning materials together, and must provide transparency. Competition between publishers must be stimulated through procurement policies and collective tender processes.

The Netherlands Authority for Consumers and Markets (ACM) calls on educational publishers to stop requiring licenses and textbooks to be purchased together, and to better align their products with demand. In addition, secondary schools could also collaborate more when procuring educational materials and make more-discerning choices based on price, quality, and the sustainable reuse of old textbooks. These are some of the conclusions of the market investigation into learning materials (digital and print).

Each year, secondary schools spend approximately 280 million euros on the procurement of learning materials (digital and print). This market is not functioning properly: over the past seven years, prices have risen faster than the prices of comparable products, and the publishers' offerings insufficiently meet the needs of schools. For example, digital and paper-based products are often still tied together, and the availability of reusable textbooks has dropped to almost zero over the past few years. ACM's market investigation has revealed that the three largest providers have a high and stable market share in most school subjects. Schools practically do not switch teaching methods even when their prices go up.

Earlier this year, the trade association for educational, professional and scientific publishers in the Netherlands (MEVW) recommended its members to stop engaging in tying, and better respond to the schools' needs. ACM supports this recommendation, and calls on publishers to stop engaging in sales techniques that are socially undesirable, such as tying. ACM can decide to launch a competition-law investigation into publishers that enjoy a dominant position in certain school subjects, and that continue to sell textbooks with mandatory software licenses. With its current toolkit, ACM has limited options against publishers that do not hold a dominant position.

Procurement policy and collaborations

An important part of the solution to the poor functioning of the market lies with the schools. In their procurement, they can pay more attention to the relationship between price and quality of learning materials. Many schools have yet to develop a policy for their procurement of learning materials. Doing so would give them a better overview of what learning materials they can procure and how these materials fit within the school's curriculum.

Schools are currently busy implementing the new national curriculum. That is why ACM calls on schools to develop a policy on learning materials now, in which regular evaluations of usage, price,

and quality are planned. In such a policy, choices can also be made regarding the use of sustainable, reusable materials, and it can be decided whether it is really necessary to have textbooks delivered to the students' homes.

Schools can also go one step further by working together when jointly procuring learning materials, under coordination of SIVON, the cooperative of and for primary and secondary education in the Netherlands. Both price and quality would be assessed in tender processes. The potential benefits include lower prices and higher quality of learning materials, and a better fit with preferences for physical or digital formats. If schools encounter challenges when putting this into practice, a gradual approach could be considered: start where there is the most to gain, for example school subjects where there is little or no choice between teaching methods. Next, schools can organize joint procurement for other school subjects.

Martijn Snoep, Chair of the Board of ACM, explains: "Pressure on the publishers starts with the willingness of schools to switch to other learning materials. That acts as an incentive for providers to price their products more competitively, develop learning materials that better meet the schools' needs, and it leads to more sustainable use of textbooks. The money that schools save on learning materials can be used differently towards high-quality education."

Recommendations

To improve the functioning of the market for learning materials (digital or otherwise), both the procurement and the selection of learning materials can be organized better.

To educational publishers: offer textbooks and licenses separately, as agreed, and offer transparency regarding price, quality, and the use of licenses.

To SIVON: organize tender processes where the bids per school subject are assessed on the best price-to-quality ratio, and use collective buyer power more explicitly to secure better terms. Introduce the new procurement regime gradually, starting with the science subjects.

To the ministry of Education, Culture and Science (OCW): encourage schools to submit bids in tender processes that potentially result in a switch to other teaching methods (procurement of a teaching method on the basis of the best price-to-quality ratio). Examine what support and financial incentives can help facilitate this.

To secondary schools: improve your procurement policy on learning materials, focusing on price, quality, and sustainability.

To the ministries of OCW and Economics Affairs and Climate (EZK): to develop a sustainable ecosystem of digital learning materials, it is critical to strengthen the existing arrangements regarding collaborations and switches between educational software.

1. Follow the education strategy for digital autonomy, and stimulate the strengthening of interoperability and data portability to avoid vendor lock-in.
2. Strengthen the Edu-V system of agreements for the benefit of both the entrants and the buyers on the Dutch educational software market.
3. Develop a framework for public-private collaborations with regard to the development of educational software by developers together with schools, and monitor the quality of the digital learning materials.

See also

- 05-10-2026 Market investigation into digital learning materials in secondary education (in Dutch)
- 05-10-2026 Responding to the draft report on the market investigation into digital learning materials (in Dutch)

<https://www.acm.nl/en/publications/acm-stop-tying-digital-and-print-learning-materials-and-strengthen-collaborations-procurement>