



GLOBAL BOOK FUND FEASIBILITY STUDY

Final Report

April 2016



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Norad



The Results for Development Institute (R4D) and International Education Partners Ltd. (IEP) partnership led the feasibility study and analysis. The findings, interpretations, and conclusions expressed herein do not necessarily reflect the views of the United States Agency for International Development (USAID), the Norwegian Agency for Development Cooperation (Norad), the United Kingdom Department for International Development (DFID), and the Global Reading Network (GRN).

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Results for Development Institute (R4D) is a global nonprofit organization working with partners in more than 55 countries to find new ways to help people escape poverty and reach their full potential. We apply fresh thinking and rigor to emerging and stubborn development challenges – particularly within the fields of health, education and governance – and we pioneer and advance creative, high-impact solutions.



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Following the finalization of this report in April 2016, the Global Book Fund was renamed The Global Book Alliance: Books for Every Child.

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Acronyms

ACR GCD	All Children Reading Grand Challenge for Development	IEP	International Education Partners
ADB	Asian Development Bank	IFFIm	International Facility for Financing Immunizations
ADEA	Association for the Development of Education in Africa	IP	Intellectual property
AFD	Agence Francaise de Developpement (France)	LEG	Local education group
AMC	Advanced Market Commitment	LIC	Low income country
ARV	Antiretroviral	LLIN	Long-lasting insecticide-treated bed nets
BRAC	Bangladesh Rural Advancement Committee	LMIC	Lower middle income country
CC	Creative Commons	LMTF	Learning Metrics Task Force
CHAI	Clinton Health Access Initiative	LOI	Language of Instruction
CIDA	Canadian International Development Agency	M&E	Monitoring and Evaluation
DepEd	Department of Education (Philippines)	MOC	Ministry of Culture
DERP	Data for Education Research and Programming	MOE	Ministry of Education
DFAT	Department of Foreign Affairs and Trade (Australia)	MOEST	Ministry of Education, Science, and Technology (South Sudan)
DFID	Department for International Development (United Kingdom)	NER	Net Enrollment Ratio
EMIS	Education Management Information System	NGO	Non-governmental organization
EU	European Union	Norad	Norwegian Agency for Development Cooperation
Gavi	The Vaccine Alliance	OECD	Organisation for Economic Co-operation and Development
GBF	Global Book Fund	PISA	Programme for International Student Assessment
GER	Gross Enrollment Ratio	PPP	Pilot Project for Publishing
GFATM	The Global Fund to Fight AIDS, Tuberculosis, and Malaria	PQR	Price and Quality Reporting
GPE	Global Partnership for Education	R4D	Results for Development Institute
GPRM	Global Price Reporting Mechanism	RBF	Results-based financing
ICT	Information and Communications Technology	RCT	Randomized control trial
ICT4E	Information and Communications Technology for Education	RMNCH	Reproductive, Maternal, Newborn and Child Health
IEA	International Association for the Evaluation of Educational Achievement	SACMEQ	Southern and Eastern Africa Consortium for Monitoring Educational Quality

SDGs	Sustainable Development Goals	UMIC	Upper middle income country
SIDA	Swedish International Development Agency	UN	United Nations
SRM	Supplementary Reading Materials	UNESCO	United Nations Educational, Scientific, and Cultural Organization
SSA	Sub-Saharan Africa	UNFPA	United Nations Population Fund
TB	Tuberculosis	UNICEF	United Nations Children's Fund
TLM	Teaching and Learning Material	USAID	United States Agency for International Development
TPR	Textbook Pupil Ratio	WHO	World Health Organization
UIS	UNESCO Institute for Statistics		

Glossary

Centralized pooled procurement The practice of bulk ordering books at the national level for a country's entire public education system.

Digital rights management (DRM) Technical protection mechanisms that use special computer code to protect copyrighted materials from being illegally copied or changed by users.

Dominant language A language widely spoken and understood in a geographic area and used as a convenient medium for social, cultural, and economic communication between different ethnic and linguistic communities. A dominant language may be large or small and may be selected as an LOI if there is no obvious, singular mother tongue language available.

Early and late LOI exit policies In some countries, a local or regional language may be used as the LOI in lower grades with a later transition to an international language as the LOI. If the transition to an international language as the LOI takes place within the primary grades (typically by P3 or P4), it is referred to as an 'early exit policy.' If the transition takes place at the end of primary (e.g., P7 in Tanzania), then it is referred to as a 'late exit policy.'

International language A language widely used in many different countries as an official language, a common means of communication, or an LOI in a national education system—often in upper primary grades, secondary grades, and higher education (e.g., English, French, Portuguese, or Arabic in sub-Saharan

Africa; Russian in Central Asian countries; Spanish in Latin America).

Language as a curriculum subject A language which is not the LOI but which the national curriculum requires should be taught as a subject. Some of these languages may be specified as electives rather than mandatory curriculum subjects.

Language of classroom communication The verbal language commonly used by teachers to communicate with their students in the classroom. This need not be the language of instruction or the textbook language unless these also coincide with mother tongue or dominant local languages. The language of classroom communication usually becomes, at least on a temporary basis, the language of speaking and listening for the students.

Language of instruction (LOI) The language in which ministries of education have decided that teaching and learning will take place. The language of instruction can change at different grade levels. In some countries there may be more than one specified LOI for a grade level (e.g., 12 different languages are specified as LOIs for P1–P3 in Uganda).

Languages children speak and understand The most common languages that young children will be able to speak and understand upon joining primary school. This will often be their mother tongue language and/or a local dominant language. Children may not be able to understand the official LOI or the textbook language when entering primary school.

Local language A language spoken and understood locally within a country. Local languages vary widely in their development and spread. Some local languages may be widely spoken and considered dominant languages. Others, however, may not be so widely spoken as to represent a potential LOI, and some may not even be so formalized to have developed an established orthography.

Mother tongue language The language spoken by a child at home and normally the language of the parents. The process of urbanization can mean that school catchment area enrollments, particularly at primary levels, comprise more than one mother tongue. In this situation, the LOI is often a dominant language rather than a mother tongue language for a majority of students.

Readability The ability of a student, or even a teacher, to read and understand the textbooks, teachers' guides, reading books, and other teaching and learning materials provided to support literacy and learning achievement in curriculum subjects.

Reading books Attractive and stimulating story books, information books, and topic books—including big books—intended to provide reading practice, vocabulary acquisition, and comprehension as the essential basis for early literacy and the development of a lifelong reading habit.

Regional language A non-international language widely spoken and understood in more than one country (e.g., Kiswahili, Hausa, and Amharic). On occasion, a regional language may take precedence over local languages or international languages as the LOI (e.g., Kiswahili in Tanzania).

Teaching and learning material (TLM) The materials provided or recommended to teachers and students as essential aids to support learning. They can range from textbooks and teachers' guides to reading books, information books, reference books, atlases, flash cards, wall charts and maps, grammar books, anthologies of stories and poems, audio materials, software, and other digital materials.

Textbook An organized and structured presentation, intended for use by students with teacher guidance, of the prescribed subject content, key competencies, and main learning outcomes for a subject syllabus normally covering one year's work. It would normally be accompanied by a linked teachers' guide aimed at supporting teachers in the optimal use of the textbook

Textbook language The language used in official textbooks and other learning and teaching materials. This is usually the same language as the LOI. The textbook language is normally the language of reading and writing in the classroom.

Underserved languages Languages without sufficient textbooks, teachers' guides, or reading books available in the classroom to support the achievement of early literacy and learning outcomes. Underserved languages are usually local, mother tongue, or even regional languages which are not used as LOIs. Some underserved languages may not have an established orthography and may lack authorship capacity because the languages have never been taught as literary languages. However, in some cases, even international languages used as LOIs may be categorized as underserved if textbooks, teachers' guides, and reading books are not supplied to schools in sufficient quantities to provide required minimum levels of learning support.

Executive Summary

Despite advances in enrollment over the past 15 years, 250 million children of primary school age are unable to recognize basic letters and numbers.¹ Worryingly, 130 million of these children attend 4 years or more of school and still leave without basic foundational skills.² The learning crisis is thus acute, and it constrains the potential and growth of children around the world.

Because of this, global focus has begun to shift in recent years to the quality of education and learning, with Sustainable Development Goal (SDG) 4 specifically focused on inclusive and equitable quality education, including inclusive and effective learning environments. Improving education quality and learning outcomes requires a number of inputs for teachers to use, chief amongst which are teaching and learning materials. These are essential aids for supporting learning and include textbooks, reading books, teachers' guides, and reference books. Many studies document that these materials show the most impact in improving primary school outcomes in developing countries³ when they are of appropriate quality and properly utilized. Specifically, numerous studies indicate that textbooks are not only a necessary input, but are one of the most cost-effective investments for raising learning outcomes.^{4,5,6} Reading books—which

include leveled and decodable readers, story books, information books, or topic books to provide reading instruction practice—are particularly important in building the foundational skill of literacy and in developing children's background knowledge in key content areas. Importantly, given the evidence of the benefits of mother tongue instruction⁷ and the value of teaching children in languages that they speak and understand,⁸ particularly in early years,⁹ books in such languages are crucial.

However, despite this evidence on the role of books in improving learning and reading acquisition, many children lack access to both reading books and textbooks. For example, a recent UNESCO survey in Africa showed that in most countries primary school children have to share textbooks. In some countries, more than 4 pupils share 1 mathematics or reading book, and in Cameroon, on average, 14 pupils share 1 mathematics textbook.¹⁰ According to two recent World Bank publications on textbook provision, the primary causes of low book availability and usage include the following: shortage, unpredictability, and unsustainability of book and book systems financing; failure to apply cost-reduction strategies in procurement, resulting in high cost of books; insufficient book management information systems and lack of data on current teaching and learning

¹ UNESCO. (2014a). Teaching and learning: Achieving quality for all. EFA Global Monitoring Report.

² Ibid.

³ Boissiere, M. (2004). *Determinants of primary education outcomes in developing countries background paper for the evaluation of the World Bank's support to primary education*. The World Bank Operations Evaluation Department.

⁴ Ibid.

⁵ Lockheed, M., and Verspoor, A. (1990). *Improving Primary Education in Developing Countries*. A World Bank Study. Washington, DC: World Bank for the World Conference on Education for All in Jomtien.

⁶ Majgaard, K., and Mingat, A. (2012). *Education in Sub-Saharan Africa: A Comparative Analysis*. World Bank, 122–154.

⁷ UNESCO. (2015a). Education for all 2000–2015: Achievements and challenges. *EFA Global Monitoring Report*.

⁸ Read, T. (2015). *Where have all the textbooks gone?: Toward sustainable provision of teaching and learning materials in Sub-Saharan Africa*.

⁹ UNESCO. (2008a). *Improving the Quality of Mother Tongue-based Literacy and Learning: Case Studies from Asia, Africa and South America*.

¹⁰ UNESCO. (2015b). *School resources and learning environments in Africa: Key results from a regional survey on factors affecting quality of education* [PowerPoint slides].

material stocks in schools; poor planning; ineffective book distribution systems that often result in loss, damage, and delivery delays; and poor book management and care in schools.^{11,12} Corruption in the book chain is of particular concern. In several instances, corruption issues have even halted nationwide textbook supply for multiple years.¹³

Although data about the availability of reading books in primary grades is not easily available, the magnitude of the challenge is at least as great as it is for textbooks.¹⁴ Our country studies confirm a significant undersupply of reading books, particularly in mother tongue languages, and even when books are available, there are major issues including poor quality and worryingly low usage.

Donors, including bilaterals and private foundations, have provided millions of dollars in funding and programmatic support to improve book provision and usage.¹⁵ Despite this extensive support, however, there continues to be an underfinancing of books, and the problem persists.

A transformative international mechanism to mobilize funding, raise awareness, and address issues across the book chain may thus be needed as a solution. In this study, we analyze the feasibility and design of such a mechanism – referred to as the Global Book Fund (GBF) – as well as gather evidence to inform the set of interventions needed to transform the book chain in order to improve reading outcomes. Our analysis was informed by data collection in 13 countries and global stakeholder consultations to apply relevant experiences from funds in health and other sectors and to learn from experiences in reading programs, commodity procurement, and provision of books.

Our recommendations are based on a detailed analysis which draws on:

- ▶ Evidence from interviews with expert stakeholders and our country studies
- ▶ Analysis of the merits and costs of a new mechanism
- ▶ Consideration of the functions and design of the GBF

A summary of our analysis is below.

Evidence from interviews with expert stakeholders and our country studies

In exploring the feasibility of a Global Book Fund, we considered the experience of health and other sector funds that have successfully revolutionized the development and provision of health and other commodities. Analysis of global health funds highlighted many differences between books and the services and commodities these funds were created to support. For example, when The Vaccine Alliance (Gavi) was created, the value of vaccines was already broadly appreciated by governments and households in most low and middle income countries, and immunization systems, though imperfect, were able to achieve 70% or higher coverage with basic vaccines in most countries. These conditions are not in place for reading books, especially in mother tongue languages.

However, although a straightforward attempt to replicate any of these mechanisms as a solution to the books problem is not recommended, there are useful lessons to be drawn from their experience.

¹¹ Read, T. (2015).

¹² Fredriksen, B., Brar, S., and Trucano, M. (2015). *Getting Textbooks to Every Child in Sub-Saharan Africa: Strategies for Addressing the High Cost and Low Availability Problem*. Washington, DC: World Bank.

¹³ Read, T. (2015).

¹⁴ Global Partnership for Education. (2013). *A Reading Fund: Reading materials to 100 million children* [Internal note].

¹⁵ The exact amount of funding provided is difficult to quantify due to the complex nature of donor funds reporting, the mix of funding from partners (e.g. country governments, NGOs) that are often involved in book provision projects, and the fact that books provision is often integrated into larger education projects with multiple components. However, triangulation of data from a variety of sources leads to the conclusion that at minimum, millions, if not billions, of donor dollars have been channeled to address the books problem over the past few decades. A review, of donor-funded books projects, a selection of which are cited in Section 1.2 of the main report, feature many projects that independently total millions of dollars. The GPE grant of \$70 million to Rwanda is just one example cited in the main report.

For example, there are relevant lessons in pooled procurement from various health products, catalytic flexible funding to accompany targeted technical support (UNITAID and Reproductive, Maternal, Newborn and Child Health [RMNCH] Trust Fund), and the importance of integrated, nationally-conceived programs (The Global Fund to Fight AIDS, Tuberculosis, and Malaria [GFATM]).

Although the scope of the feasibility analysis was primarily focused on reading books, the dearth of literature on reading books meant that much of the evidence cited relates to textbooks. Where possible, our findings specifically focus on reading books; in other instances, we infer the challenges in reading books using data from textbook provision practices. The findings along each line of inquiry are presented in Figure 1 below.

Figure 1. Summary of Findings

Line of inquiry	Finding
Demand, planning, and financing of books	1: Lack of awareness among governments, parents, and teachers of the value of reading books in supporting literacy.
	2: Lack of data on book provision and learning outcomes limits the ability to assess progress, identify inefficiencies, and mobilize appropriate resources. A GBF could play a key role in (a) providing funding or technical support to implement improved in-country data systems, (b) making country-level data collection a requirement for GBF book funding, and/or (c) hosting or supporting an online data sharing platform.
	3: To meet a theoretical minimum book standard for all pre-primary and primary students, low and middle income countries need to spend between US\$3.1 billion–US\$3.9 billion yearly. However, research is needed to understand a more realistic, current, addressable market size.
	4: Analysis of primary education spending reveals an underfinancing of books, including textbooks and reading books. To meet minimum book standards, out of 32 countries studied, 18 face significant annual budget gaps that total nearly US\$200 million. However, improving spending efficiency, rather than raising absolute funds, is a priority for half of LMICs and all UMICs.
	5: There are three distinct categories of countries exhibiting different financing needs, thus requiring different types of support from a GBF: <ul style="list-style-type: none"> ▶ Group 1 countries do not spend enough on both textbooks and reading books and do not have the capacity to increase spending ▶ Group 2 countries also have significant funding gaps but improved efficiency could help counter some of the gap ▶ Group 3 countries do not face funding gaps

Line of inquiry

Finding

Procurement and production of books

- 6: There is an inadequate supply of appropriate mother tongue reading book titles due to low awareness of the value of reading books, limited authorship capacity, and lack of content sharing arrangements. Given these challenges, the GBF could, at the global level, serve as or support a content repository to expand access to published titles, and at the country level, support the growth, sustainability, and quality of local publishing industries as needed.
- 7: Public sector book procurement is not always optimized for cost, quality, and sustainable supply. A GBF could play a role in (a) disseminating and incentivizing the use of procurement best practices, (b) improving the consistency and predictability of demand, and/or (c) promoting centralized pooled procurement for reading books at the national level to lower book costs.
- 8: The cost to implement a digital reading program based on a library model is about 12–13 times more expensive than the cost to implement a similar print reading program. However, for structured reading programs where each child is reading the same book at the same time, digital programs are less expensive per child than print programs.
- 9: There are high technical, investment, and recurrent cost barriers to the adoption of digital reading materials, including a lack of sufficient infrastructure to support device use, and high intellectual property related (IP-related) transaction costs.
- 10: Operational challenges also constrain the uptake of digital materials and include challenges related to education policy, content availability, and utilization.

Supply chain management of books

- 11: Supply chain and distribution issues vary by country, although common challenges include weak demand forecasting, poor management systems, inadequate financing, lack of trained staff, and inefficient distribution.
- 12: Distribution can be centralized or decentralized, with the public, private, and NGO sectors playing a mix of roles. The effectiveness of the distribution model varies by context and is influenced by accountability measures and the capability of the responsible actor.
- 13: Citizen accountability mechanisms to monitor distribution have been used successfully in some countries—for example, India and the Philippines—and may hold valuable lessons to reduce corruption in sub-Saharan Africa.

Usage of books

- 14: Although data on reading books is limited, research on textbooks reveals that book provision does not equate with usage.
- 15: Many teachers are unaware of how to appropriately use books in classrooms and how to set up and run school and classroom libraries. Usage can therefore be optimized through ensuring pedagogical quality of books, teacher training on how to incorporate books into lessons, establishment of classroom libraries, and advocacy campaigns.
- 16: Although complementary reading programs can improve reading achievement in students, uncertainties on the cost-effectiveness of these programs persist due to lack of data and agreement on the ideal number of titles needed per student or per class.

Analysis of the merits of a new mechanism

A new mechanism is needed to raise awareness about the high returns from books at the global and country level, to develop and disseminate best practices, and to mobilize funding. Our findings suggest a lack of awareness of the value of reading books in supporting early literacy, which inhibits demand from teachers, parents, and ministries of education. This in turn results in inadequate funding (or in many countries no funding at all) for reading books as well as textbooks, and for many low income countries (LICs), external financial mobilization is needed to close the funding gap. Additionally, there is a critical need for countries to rapidly access specialized technical knowledge for high-impact activities that can lead to the most significant opportunities for savings and quality improvements around the development, procurement, and supply chain management of books. Thus there is a need for a fast-moving entity to disburse targeted funding consistent with country plans.

An analysis of the benefits and costs of a new mechanism—specifically, a GBF—in contrast to using existing bilateral or multilateral channels indicates that the creation of a new mechanism is justified for three reasons:

- ▶ A new mechanism can play a critical role in harmonizing current funding for books and in ensuring greater effectiveness of funds. This may represent an opportunity to strengthen the coordination of funding and subsequently ensure greater transparency and predictability through the architecture of a new dedicated mechanism.¹⁶
- ▶ A new global entity is needed to break away from the traditional donor-project approach and instead play a system-strengthening role.
- ▶ Financing needs in this area are substantial, and although it may be difficult, a new mechanism could possibly mobilize dedicated funds.¹⁷

That said, establishing a new global mechanism is inherently a sensitive and political topic. One of the most significant potential criticisms is that new funds can contribute to increased fragmentation and may not be needed.¹⁸ There is also the danger that new funds can add transactional costs, not be well integrated within the relevant sector, and stall systemic change. Other concerns are that funds may be vulnerable to corruption and may lessen or replace domestic resource mobilization.¹⁹ Stakeholders consulted also cautioned that there is a low appetite for a new global fund, in contrast to the political climate that existed during the creation of health funds.

Despite these arguments, however, we find on balance that the severity and fundamental nature of the books problem requires the creation of a new mechanism. To guard against the aforementioned risks, careful attention has been paid to the proposed activities and design of the GBF.

Consideration of functions and design of the GBF

We propose that the GBF serve four functions. Careful consideration must be given to prioritization and sequencing, with specific activities expanded and refined over time.

At the global level, it would:

Function 1: Develop and disseminate knowledge and best practices on the effective development, procurement, distribution, and usage of all books.

Influential donors and implementation partners are already supporting reading initiatives—for example, at the multilateral level, the GPE, World Bank; at the bilateral level, USAID and DFID; and at the regional level, the Working Group on Books and Learning Materials at ADEA. However, there does not exist at the global level a dedicated technical unit with the expertise to serve as a repository of knowledge and best

¹⁶ Sustainable Development Solutions Network. (2015). *The Role of Global Funds in a Post-2015 Development Framework*.

¹⁷ Ibid.

¹⁸ Bezanson, K. A., and Isenman, P. (2012). *Governance of New Global Partnerships*. CGD Policy Paper 014. Washington, DC: Center for Global Development.

¹⁹ Sustainable Development Solutions Network. (2015).

practices and to enhance the effectiveness of support already provided in books provision. Nor do most of the agencies supporting reading themselves have sufficient staff familiar with the book market and supply chain. The GBF could thus serve as a repository and generator of information around all aspects of the book chain.

Function 2: Advocate and instill the importance of reading materials and gain buy-in from champions to spur long-term policy dialogue. Our consultations revealed a lack of awareness on the importance of reading books, particularly in mother tongue languages. It is crucial to ignite a culture of reading specifically focused on supporting children in learning to read and write and in reading to learn within school and home contexts.

At the country level, it would:

Function 3: Fund technical assistance to improve the development, procurement, distribution, and usage of books to improve learning outcomes. We propose that a country-driven exercise be used to identify needs and areas of support all along the book chain. This could form the basis for proposals to the GBF to request specialized technical support. We recommend that the GBF fund the provision of technical assistance but not itself assume responsibility for its provision. In addition, learning from the success of flexible program financing in the health sector, we propose that the GBF provide programmatic funding to complement the funds for technical support and address demand side barriers. For example, such funding could be used to raise awareness of the value of books, support teacher training, and foster accountability systems and other mechanisms to ensure that books are effectively used to improve learning outcomes.

Function 4: Fund reading books in mother tongue languages that correspond to languages of instruction (LOIs) where there is demonstrated financial need and country commitment. In countries that demonstrate need, we propose that the

GBF provide multi-year funding to purchase books, increase demand predictability, and engage and build local publishing capacity. Amongst all experts consulted, there was agreement that it is ideal to have local publishing industries in all countries where it is feasible. Although the evidence base is limited, consulted stakeholders noted that local publishing is important to ensure that book content is culturally relevant. In certain circumstances, for example in emergencies or where government capacity is absent, the GBF might also procure reading books directly from publishers.

Our exploration of market-shaping opportunities reveals that the greatest opportunity for efficiencies is in increasing print run sizes to achieve economies of scale in book production. The three primary ways to achieve this would be (1) increasing funding and procurement volumes for reading books, (2) creating nationally standardized book lists to aggregate demand around a fixed number of titles, and (3) centralizing national procurement. Although there is currently insufficient funding and little procurement of reading books by governments, if funding is provided to countries that demonstrate need, then centralized national procurement is likely to be the most cost effective system. Specifically for reading books, facilitating the pooled procurement at the *national* level and moving from a 5,000 to 25,000 print run size corresponds to a 33% savings per book. However, pooled procurement at the regional level across countries with common languages would only be relevant if funding for reading books remains limited in each country such that full-potential print run sizes are not realized.²⁰ As part of Function 3, the GBF could thus fund technical support to countries to develop a system where there is local autonomy over book choice within centralized national procurement, while through Function 4, it could require and support pooled procurement at the national level.

²⁰ Full-potential print run size is defined as roughly 50,000 copies, as per-book savings are marginal above this amount (Finding 7, Section 2.2.2). As previously examined, if reading book funding increases significantly such that 50,000 print run sizes can be realized in each country, pooling volumes across countries would provide limited benefit, given that cost savings are marginal above this volume level.

All functions of the GBF have been purposely designed to take on the broader challenge around access and provision of all books. However, we propose that in its initial stage, Function 4 prioritizes the funding of pre- and primary grade reading books in mother tongue languages that correspond to the language of instruction, given the critical role that this plays in improving literacy. Over time, the GBF might also move to fund the provision of textbooks in certain circumstances and expand its scope to regional and international languages of instruction as well as to higher grade levels. However, this is not proposed initially, due to the more urgent need to provide reading books in languages that children speak and understand.

We outline below six structural and operational considerations for the design of the fund:

- (i) **Funding and implementation model:** We propose that the GBF provide cash *grants* and fund *technical assistance* to eligible countries in response to *country proposals* which would be assessed by a technical committee and then approved by a governance body. There likely is scope for experimenting with using results-based financing (RBF) techniques for books, in order to help tackle the huge issues associated with ensuring that books are supplied, distributed, and used. Specifically, if payments were to be tied to results at the different stages of the book supply chain, considerable efficiencies could result.
- (ii) **Country eligibility, “graduation,” allocation across countries:** We propose that eligibility to apply for technical assistance from the GBF be quite broad, perhaps including all low and middle income countries. To receive funding for books, however, countries should have to demonstrate both need and government commitment, and poorer countries should have priority.
- (iii) **Country co-financing:** Both Gavi and GFATM require countries to share the cost of funded programs to ensure that programs which are started or expanded through their support are sustained (Gavi does this by independently procuring an agreed fraction of vaccines, GFATM by demonstrating that a certain share of program costs are coming from domestic resources). We propose that some form of co-financing also be central to the GBF strategy, with the required share dependent on country income and other considerations.
- (iv) **Monitoring and evaluation:** The GBF will need to have its own robust Monitoring and Evaluation (M&E) system and will need to support country M&E systems. A robust GBF M&E system can assure quality, safeguard against fund diversion, and demonstrate project effectiveness and efficiency. Additionally, a strong M&E system will be crucial in evaluating country performance. Meanwhile, at the country level, systemic data on books provision, collected through M&E systems, can also serve as an important global public good. The GBF’s M&E structure must address the tension between balancing the benefits of M&E with the often high transaction costs of gathering robust data. We propose that the GBF align its M&E as much as possible with not only its host organization but also with information that countries are already collecting. In order to support a robust system at the country level, we recommend that the GBF provide sufficient funding for technical support to countries in order to build internal capacity and country ownership in M&E and data management
- (v) **Institutional structure:** It would be preferable for the GBF to be hosted by an existing organization, if an appropriate and willing host can be found. The main advantages of this option are cost (as the GBF would not have to develop all the necessary structures and capabilities of a free-standing financing organization) and greater integration (in that it would be easier to ensure that the GBF’s investments are well coordinated with complementary investments in the education sector). Given considerable reluctance to create new international mechanisms, it would also be essential that the GBF be as lean an operation as compatible with its functions, and

housing it within an existing organization should help contribute to this.

- (vi) **Governance:** The appropriate governance model depends on whether the GBF is hosted by another organization and, if so, on how that organization is governed. If the GBF is hosted by another institution, these arrangements would be subject to and circumscribed by the governance structures of the host organization, and the exact division of responsibility between the host organization's structures and that of the GBF would have to be negotiated.

Further areas of exploration and analysis

Based on our consultations, potential next steps for the advancement of the GBF include:

Fund concept development and refinement

1. **Refine operational and governance structures:** Based on the institutional structure ultimately decided for the GBF, the governance structure will need to be carefully developed and assessed through consultations with technical experts.
2. **Refine the model for fund disbursement:** A number of areas still need to be further explored around this process, including how country proposals will be developed and submitted, eligibility criteria, appropriate results-based financing techniques, and coordination of GBF funding with other education support.

Political support and buy-in

3. **Consultations to generate political buy-in for a new mechanism:** Opportunities to build political support (e.g., through the activities of the new International Commission on Financing Global Education Opportunity or through the G7) need to be explored, as does the fit with other international educational priorities such as helping educate refugees and the promotion of global citizenship.

Deeper analysis in a select number of areas

4. **Further analysis on the feasibility and provision of reading materials to targeted populations:** More analysis and exploration of the specific needs of children in distinct contexts (for example, children living with disabilities) is needed to better understand how the GBF could effectively support reading in such circumstances.

Test approaches

5. **Test and explore specific approaches to demonstrate proof of concept:** Small-scale pilots in a select number of countries to test specific approaches should be undertaken in the first phase of the GBF.

Preface

The Results for Development Institute (R4D) and International Education Partners Ltd. (IEP) partnership was formally contracted in July 2015 to analyze the feasibility and design of a proposed Global Book Fund (GBF). As stated in the Terms of Reference, the objective of the fund (a term used to capture a set of interventions but not necessarily to imply one global fund) would be to transform authorship, book development, publishing, procurement, distribution, and classroom usage to improve reading outcomes.

Our work in Phase 1 (July 2015—January 2016) focused on gathering the evidence to inform the set of interventions needed to improve learning outcomes through a more expansive use of reading materials at the pre-primary and primary level. Phase 2 of the

work will be decided following the Phase 1 report and may include measures for refining the fund's specifications and structures, designing specific approaches to demonstrate proof of concept, and building momentum and buy-in from a range of stakeholders.

The scope of our work covered all materials facilitating primary grade reading in children. The focus was specifically on reading books in languages of instruction (LOIs), or curriculum languages that are created to match the age-grade level interest and reading ability of early readers, and included both print and digital materials. However, given the commonalties in issues facing reading books and textbooks, a broader lens was applied when considering the scope and activities of a GBF.

1. The strategic context

The strategic context presents an evidence-based illustration of the learning crisis, as well as lessons that could be learned from the experience of health funds that have revolutionized the development and provision of health and other commodities. Section 1.1 discusses the current learning crisis, the critical need for books in order to boost learning, and the reasons for low levels of book availability despite the essential benefits of books. Section 1.2 provides a brief overview of past and current government, donor, and NGO-led initiatives aimed at increasing book provision. It explores why these interventions have proven insufficient thus far. Lastly, Section 1.3 discusses lessons from funds in health and other sectors that may be valuable when considering solutions for increasing access to books in schools.

1.1. The context and evidence

The link between books and learning

Despite advances in enrollment over the past 15 years, the recent Education for All Global Monitoring Report warns that 250 million children of primary school age are unable to recognize basic letters and numbers. 130 million of these children attend 4 years or more of school and are still leaving without basic skills in reading and math.²¹ The learning crisis is thus acute and constrains the potential and growth of children around the world.

Raising education quality and learning outcomes requires a number of inputs for teachers to use, chief amongst which are teaching and learning materials

(TLMs). These are essential aids to support learning and can range from textbooks and teachers' guides to reading books, information books, reference books, atlases, flash cards, wall charts and maps, grammar books, and anthologies of stories and poems (Box 1). One meta-review of studies that evaluated the effectiveness of educational inputs, published by the World Bank Operations and Evaluation Department, notes that TLMs "show the highest incidence of impact for improving primary school outcomes in many developing countries" even when evaluated by studies that adopted a range of research methodologies.²²

Box 1

Teaching and learning materials are materials provided or recommended to teachers and students as essential aids to support learning. These include textbooks and reading books.

Textbooks are defined as organized and structured course materials that correspond to an often year-long subject syllabus and are designed to facilitate the acquisition of learning outcomes specified by the curriculum.

Reading books can be leveled and decodable readers, story books, information books, or topic books intended to provide reading practice, vocabulary acquisition, and comprehension as the essential basis for early literacy and the development of a lifelong reading habit.

²¹ UNESCO. (2015a). Education for all 2000–2015: Achievements and challenges. *EFA Global Monitoring Report*.

²² Boissiere, M. (2004). *Determinants of primary education outcomes in developing countries: Background paper for the evaluation of the World Bank's support to primary education*. World Bank Operations Evaluation Department.

Specifically within TLMs, studies^{23,24,25} affirm that textbooks are one of the most cost-effective investments for raising learning outcomes. Indeed, an empirical study of 22 sub-Saharan African countries found a 5–20% increase in student achievement in class subjects where each child was provided a textbook.^{26,27}

Reading books—including story books, information books, and topic books, and also referred to as supplementary reading materials (SRM) or readers—are particularly important to building the foundational skill of literacy and may be even more essential inputs than textbooks in the early grades. Reading is a prerequisite for student achievement, and children who do not learn to read early face extreme difficulty learning in other subjects and at higher grades.²⁸ In addition, research shows that literacy has positive impacts well beyond learning outcomes—affecting cognition, income, employment, and health amongst other factors.²⁹ Thus, the improvement of literacy is critical to both education and human growth, and reading books by association are essential for that very reason. Although literature specifically on reading books is sparse, two World Bank studies spanning 89 African education projects identify reading books as cost-effective and important components to boosting literacy.^{30,31}

However, studies caution that textbooks and reading books—collectively referred to as books—alone do not improve learning outcomes. Careful attention must also be paid to the systems surrounding the books. For instance, a randomized control trial (RCT) in Kenya found that textbooks were not effective in improving learning outcomes, noting that textbooks written in languages children did not understand and the orientation of the overall education system towards strong students contributed to their ineffectiveness.³² This and other studies highlight the importance of book quality and relevance of content as well as the continued need to develop education systems as a whole for books to be effective inputs.^{33,34} Teacher training in the use of books and access to books once procured or delivered to schools are also key to ensuring improved learning outcomes.^{35,36,37,38}

As the Kenya RCT underscores, the selection of textbook and reading book language is of particular importance to ensure books are facilitating learning. Amongst the education community, there is widespread recognition of the benefits of teaching children in languages they speak and understand.³⁹ One form of this is the widening acceptance of mother tongue instruction and teaching children in their home language.^{40,41,42} Studies show the marked

²³ Lockheed, M., and Verspoor, A. (1990). *Improving Primary Education in Developing Countries*. World Bank. Washington, DC: World Bank for the World Conference on Education for All in Jomtien.

²⁴ Read, T. (2015). *Where have all the textbooks gone?: Toward sustainable provision of teaching and learning materials in Sub-Saharan Africa*.

²⁵ Majgaard, K. and Mingat, A. (2012). *Education in Sub-Saharan Africa: A Comparative Analysis*, 122–154. World Bank.

²⁶ Michaelowa, K., and Wechtler, A. (2006). *The cost-effectiveness of inputs in primary education: Insights from the literature and recent student surveys for Sub-Saharan Africa*. Paper presented at the Association for the Development of Education in Africa—Biennale on Education in Africa.

²⁷ Plonski, P. (2010). *Providing books for schools and libraries in Africa: What is the impact on literacy?*

²⁸ UNESCO. (2014a). *Teaching and learning: Achieving quality for all*. EFA Global Monitoring Report.

²⁹ Kirsch, I., de Jong, J., Lafontaine, D., McQueen, J., and Monseur, C. (2002). *Reading for change: Performance and engagement across countries: Results from PISA 2000*. Organisation for Economic Co-operation and Development.

³⁰ World Bank. (2002). *World Bank support for provision of textbooks in Sub-Saharan Africa: 1985–2000*. Africa Region Human Development Working Paper Series.

³¹ Plonski, P. (2010).

³² Glewwe, P., Kremer, M., and Moulin, S. (2009). Many Children Left Behind? Textbooks and Test Scores in Kenya. *American Economic Journal: Applied Economics*, 1(1), 112–135.

³³ Boissiere, M. (2004).

³⁴ Snilstveit, B., et al. (2015). *Interventions for improving learning outcomes and access to education in low- and middle-income countries: a systematic review*. International Initiative for Impact Evaluation (3ie).

³⁵ Ibid.

³⁶ Sabarwal, S., Evans, D. K., and Marshak, A. (2014). *The permanent input hypothesis: The case of textbooks and (no) student learning in Sierra Leone*. Washington DC: World Bank Group Education Global Practice Group & Africa Region.

³⁷ Das, J., Dercon, S., Habyarimana, J., Krishnan, P., Muralidharan, K., and Sundararaman, V. (2013). School inputs, household substitution, and test scores. *American Economic Journal-Applied Economics*, 5(2), 29–57.

³⁸ Read, T. (2015).

³⁹ Ibid.

⁴⁰ UNESCO. (2015a).

⁴¹ UNESCO. (2008b). *Mother Tongue Matters: Local Language as a Key to Effective Learning*.

⁴² RTI International. (n.d.) *Improving Learning Outcomes through Mother Tongue-Based Education*.

Box 2

“[A study by Walter and Cho (2010) showed that] in Cameroon, children taught in their local language, Kom, showed a marked advantage in achievement in reading and comprehension compared with children taught only in English. Kom-educated children also scored twice as high on mathematics tests at the end of grade 3. However, these learning gains were not sustained when the students switched to English-only instruction in grade 4.”

Sources:

UNESCO. (2014a). Teaching and learning: Achieving quality for all. *EFA Global Monitoring Report*.

Walter, S. L. and Chuo, K. G. (2012). *The Kom Experimental Mother Tongue Education Pilot Project: Report for 2012*. Dallas, TX: SIL International.

gains that can be achieved in educational outcomes when children learn in languages they speak and understand (Box 2). Additional benefits include cognitive development, ease and speed in learning a second language, improved self-identity, and stronger parental involvement.⁴³ Studies also show that dropouts, repetition, and low achievement are reduced when mother tongue instruction is adopted in schools.^{44,45} Mother tongue or first language instruction is particularly crucial in early years⁴⁶ and sets the foundation for further learning achievement. Importantly, instruction needs to be accompanied by books in the same languages.⁴⁷ The same study on Kom-educated children (Box 2) also cautions that careful attention must be paid when early exit LOI policies require children to transition to a second language within the primary grades. Learning gains from mother tongue education can be easily lost if appropriate support, including books, is not provided to aid the shift.

In order for children to learn in languages they speak and understand, the languages of instruction (LOIs) in schools must correspond to these languages. While this scenario is the reality in some situations, teaching in languages that children speak and understand (i.e. mother tongue) may not always be possible due to political or practical constraints. The process of urbanization can mean that school enrollments, particularly at primary levels, comprise more than one mother tongue. In Uganda, for instance, this phenomenon has made it more difficult to identify distinct mother tongue languages which could serve an entire community due to intermixing of vocabulary, phrases, grammar, and syntax between previously distinct languages.⁴⁸ In these circumstances, some research suggests that selecting another common language that is familiar to children may suffice as a practicable option.⁴⁹ A dominant local language may thus be selected as a language of instruction; however, the risk is that the dominant language selected as an LOI may disadvantage learners from more marginalized ethnic or linguistic groups.⁵⁰ LOI policies may thus encompass mother tongue, dominant languages, and international languages, and the degree to which each is enforced varies, causing further complication for mother tongue LOI adoption in practice. For example, in Nigeria, the default LOI in lower primary school is English, but schools can use a mother tongue of their choice such as Hausa, Yoruba, or Igbo; however, this option is not actively encouraged by the Ministry of Education (MOE) and is widely disregarded by schools due to a number of implementation constraints, including a lack of both mother tongue instructional materials and teacher training in mother tongue instruction.⁵¹ There is thus an urgent need to ensure that sufficient learning materials and teacher training is provided where mother tongues are offered as an LOI.

⁴³ Ibid.

⁴⁴ Global Campaign for Education. (n.d.). *Global Campaign for Education Policy Brief: Mother-tongue education: policy lessons for quality and inclusion*.

⁴⁵ RTI International. (n.d.)

⁴⁶ UNESCO. (2008a). *Improving the Quality of Mother Tongue-based Literacy and Learning: Case Studies from Asia, Africa and South America*.

⁴⁷ UNESCO. (2014a).

⁴⁸ Uganda Ministry of Education, Science, Technology, and Sports. (2002). *Uganda Draft School Library Policy*.

⁴⁹ UNESCO. (2008a).

⁵⁰ Global Campaign for Education. (n.d.).

⁵¹ Duze, C.O. (2011). Implementation of the Mother Tongue/Language Component of the National Policy on Education in Nigeria. *Latwi: A Journal of Contemporary Research*, 8(1).

A final consideration is that in some countries a local language—which could be a mother tongue language or a dominant language—may be used as the LOI in lower grades with a later transition to a regional or international language as the LOI. Although analysis of the timing and learning effects associated with this transition transgresses the scope of this study, careful attention must be paid to ensure that there are sufficient teaching and learning materials in later grades in other LOIs so that learning gains are not lost.

The lack of high-quality, affordable books

Despite clear evidence that textbooks and reading books are a cost-effective means of supporting learning, significant variability in books provision persists between and within developing countries. With regard to textbooks, for example, in 2014 in 10 countries in Francophone Africa, reading textbook availability in early primary grades ranged from 61.7% of children having their own textbooks in Senegal to just 3.9% in Burundi.⁵² Similarly, Figure

2 (below) estimates textbook–pupil ratios (TPR) for urban, rural, and remote locations and highlights the variability of textbook levels within six African countries.^{53,54} Textbook accessibility also differs across other factors such as gender, with girls often having fewer books than boys.⁵⁵

Although data for the availability of reading books in primary grades is not easily available, the magnitude of the challenge is at least as great as that for textbooks.⁵⁶ Our consultations with stakeholders also reinforced the magnitude of the problem, and they spoke of reading books as far more or completely neglected compared to textbooks.⁵⁷ The 13 country studies conducted by our team yielded similar stark results: not one of the 13 countries had adequate supplies of reading books in classrooms.⁵⁸ For instance, in Sindh, Pakistan, we found that less than 1% of government primary schools have school libraries, even fewer have classroom libraries, and reading books are altogether scarce.⁵⁹ While there is no large-scale global data on book availability in local languages, low availability of these materials can be deduced from

Figure 2. Estimated textbook–pupil ratios in urban, rural, and remote locations

Country	Urban	Rural	Remote
Benin	1:10	1:10	1:10
Burundi	2:3	1:3	1:10
Cote d'Ivoire	1:1	1:1	—
Kenya	1:2	1:3	1:5
Namibia	1:5	1:10	1:15
Rwanda	1:3	1:3	1:3

Note: Compare to ideal textbook–pupil ratios of 1:1 or 1:2.

Source: Read, T. (2015). *Where have all the textbooks gone?: Toward sustainable provision of teaching and learning materials in Sub-Saharan Africa*.

⁵² PASEC. (2015). *PASEC2014 Education System Performance in Francophone Sub-Saharan Africa: Competencies and Learning Factors in Primary Education*. Dakar: PASEC.

⁵³ Read, T. (2015).

⁵⁴ In interpreting these numbers, it is important to note not only the scarcity of books in certain geographies but also that quality and use may still be a concern even where books are available in sufficient quantities.

⁵⁵ UNESCO. (2009). *Promoting Gender Equality through Textbooks: A methodological guide*. Paris: UNESCO.

⁵⁶ Global Partnership for Education. (2013). *A Reading Fund: Reading materials to 100 million children* [Internal note].

⁵⁷ Crabbe, Richard. (2015). World Bank. Interview conducted by R4D. 4 December 2015.

⁵⁸ Country Case Studies—see Annex 3.

⁵⁹ Pakistan Case Study—see Annex 3.

a USAID study that surveyed African language TLM titles in 11 countries and found that even for languages that had more than a million speakers, there was an extremely limited number of titles.⁶⁰

Reasons for low availability are similar for both textbooks and reading books, as they are provided through similar channels with the involvement of many of the same actors, and while they vary across countries, some common themes are observed. According to two World Bank publications on textbook provision, the primary causes of low book availability and usage include: book shortages; unpredictable and unstable book and book systems financing; failure to apply cost-reduction strategies in procurement resulting in higher cost of books; insufficient book management information systems and lack of data on current teaching and learning material (TLM) stocks in schools; poor planning; ineffective book distribution systems that often result in loss, damage, and delivery delays; and poor book management and care in schools.^{61,62} The Read publication lays additional emphasis on limited teacher incentive or knowledge in the usage of books as a barrier to effective books provision,⁶³ while the Fredriksen, Brar, and Trucano book notes that the added factor of rapid population growth in sub-Saharan Africa (SSA), as compared to Asia, has increased family size and student populations, limiting book availability by further constraining government and familial budgets.⁶⁴ A publication by Crabbe and Nyingi identifies the lack of a national policy framework to support books provision and political economy concerns⁶⁵ as further primary challenges.

Corruption in the book chain is of particular concern. In several instances, corruption issues have even halted nationwide textbook supply for multiple years. For instance, in South Sudan, corruption in textbook provision was so severe that donors cut off funding for textbooks from 2009 to 2011, resulting in 1.9 million children being left without textbooks annually.⁶⁶ Millions of dollars of funding poured into books provision, involvement of numerous stakeholders, multiple layers in the books chain, and high stakes for some stakeholders make it an attractive target.⁶⁷ Corruption can take many forms, involve diverse actors, and contribute to low availability in several ways. Crabbe notes that procurement processes provide avenues for corruption,⁶⁸ and Read puts forth increases in textbook costs and stock losses as examples of subsequent effects on books provision.⁶⁹

1.2. A review of interventions to address the books gap

Over the past few decades, numerous developing country governments, donors, and NGOs have tried to address the causes of low book availability. Millions of dollars of aid funding have been allocated towards TLM provision and usage by a host of bilaterals (e.g. CIDA, DFID, Norad, SIDA, USAID), multilaterals (e.g. World Bank, UNICEF, ADB, DFAT, AFD, GPE), and private foundations (e.g. Aga Khan Foundation, Save the Children, Skoll Foundation, BRAC).⁷⁰ However, the exact amount of funding provided is difficult to quantify due to the complex nature of donor funds reporting, the mix of funding from development

⁶⁰ RTI International. (2015a). *Data for Education Research and Programming (DERP) in Africa. Reading Materials Survey. Final Report.* USAID| Africa Bureau Education Division.

⁶¹ Ibid.

⁶² Fredriksen, B., Brar, S., and Trucano, M. (2015). *Getting Textbooks to Every Child in Sub-Saharan Africa: Strategies for Addressing the High Cost and Low Availability Problem.* Washington, DC: World Bank.

⁶³ Read, T. (2015).

⁶⁴ Fredriksen, B., Brar, S., and Trucano, M. (2015).

⁶⁵ Crabbe, R. A. B., Nyingi, M., and Abadzi, H. (2014). *Textbook development in low income countries: A guide for policy and practice.* Washington, DC: World Bank.

⁶⁶ Read, T. (2015).

⁶⁷ Crabbe, R. A. B., Nyingi, M., and Abadzi, H. (2014).

⁶⁸ Ibid.

⁶⁹ Read, T. (2015).

⁷⁰ Triangulation of data from a variety of sources leads to the conclusion that, at minimum, millions, if not billions, of donor dollars have been channeled to address the books problem over the past few decades. A review of donor funded books projects, a selection of which are cited in Section 1.2, feature many projects that independently total millions of dollars. The GPE grant of US\$70 million to Rwanda is just one example cited later in the text.

partners (e.g., country governments, budget support programs, and NGOs) that are often involved in book provision projects, and the fact that book provision is often integrated into larger education projects with multiple components.

Despite this, an indication of the level of donor funding that has been provided to TLMs can be drawn from various data. One study estimates that 72% of the 110 education projects that the World Bank financed in 40 SSA countries between 1985 and 2000 included support for textbooks.⁷¹ Developing country governments also allocate financing for TLM budgets. However, the current level of spending on TLMs is less than 2% of education spending in most LICs, at the lower end of the 5%–26% spending range that is recommended for LICs through our analysis (further elaborated upon in Section 2.2.1/Finding 4).

The funding channeled into books has been used for programmatic interventions by a combination of donors, developing country governments, and NGOs (e.g., CODE, Room to Read, Save the Children, Worldreader, eKitabu) to increase TLM provision and usage. While impossible to cover the decades of projects undertaken by these actors, the broad buckets of activities that have been typical of TLM projects include initiatives around: (i) direct funding, technical assistance, and provision of equipment to strengthen the development, production, and supply chain of TLMs; (ii) support for TLM management and usage at the school and classroom levels; and (iii) advocacy, knowledge dissemination, and fostering shared dialogue.⁷²

First, initiatives to strengthen the development, production, and supply chain of TLMs have involved direct funding of content development, physical production, distribution, and storage of TLMs. For example, Basa Philipinas is a four year project initiated in 2013, funded by USAID, and implemented in collaboration with the Philippines Department of

Education. This flagship project contributes US\$1.5 million in teachers' guides, read-aloud books, leveled readers, and reading books in Filipino, English, and selected mother tongues in two regions of the country. The project additionally constructed textbook storage facilities at 78 county education offices and supplied book storage boxes for 3,000 schools.⁷³ In South Sudan, the DFID Textbook project, at the request of the MOEST (Ministry of Education, Science, and Technology), provided US\$15.7 million to (i) procure and supply to schools primary textbooks, teachers' guides, reading books, and other supplementary learning and teaching materials, (ii) undertake the construction of textbook storage facilities at 78 county education offices between 2012 and 2015, and (iii) fund the distribution of the TLMs to counties and schools.⁷⁴ In Ethiopia, the General Education Quality Improvement Project 1 similarly provisioned 78.1 million textbooks and teachers' guides for primary and secondary schools. Books were made accessible in five mother tongues and a student-to-book ratio of 1:1 was achieved as a result of this project in seven and thirteen subject areas in primary and secondary schools, respectively. Such initiatives have also provided and funded technical assistance to strengthen TLM supply chain components. For instance, with the support of a US\$70 million grant from the GPE, the Rwandan Ministry of Education has implemented a transformative TLM tracking system that allows access to data on all aspects of book procurement, stock levels, and book usage in classrooms. The advent of this system is aimed at improving the government's TLM planning and management capacity.⁷⁵ A separate intervention, the Tanzania Children's Book Project, focuses its efforts on a combination of direct funding and technical assistance by offering capacity training to writers, illustrators, publishers, and booksellers and adopting a unique reading book purchasing model. Through this model, the organization guarantees to purchase half of print runs at cost while requiring publishers

⁷¹ Fredriksen, B., Brar, S., and Trucano, M. (2015).

⁷² Projects referenced in this section are meant to serve as examples and not to individually be taken as representations of the status quo.

⁷³ Philippines Case Study—see Annex 3.

⁷⁴ South Sudan Case Study—see Annex 3.

⁷⁵ Global Partnership for Education. (n.d.). *Books for All: Rwanda's Innovative Textbook Distribution Program*. GPE.

to sell the remainder for their own profit, in order to increase access to local language reading books in the marketplace.⁷⁶

Second, many interventions have focused on TLM management and usage at the school and classroom levels, including the development of school libraries and teacher training in TLM use. For instance, Room to Read, a nonprofit organization dedicated to inculcating a lifelong reading habit in primary school children, develops classroom libraries and trains teachers and librarians in TLM and library management in addition to producing the reading books to stock them. With over 17,000 libraries, this NGO has reached 10 million children in 10 countries.⁷⁷ The Library Hub Project is another library model established by the Philippines Department of Education in 2005. Funded and implemented through national-local government collaboration, the initiative creates non-traditional book centers to make reading books accessible to multiple schools in a catchment area through a shared book bin model that rotates on a monthly basis.⁷⁸

Third, advocacy, knowledge dissemination, and fostering shared dialogue are other significant areas of focus for literacy interventions. For example, the Global Reading Network spreads best practices on title development, access, procurement, financing, and supply chain management, while also engaging in limited advocacy on the importance of literacy acquisition in the primary grades. At a country level, Rwanda Reads is an example of a government-initiated advocacy campaign. This four-year MOE initiative brings together donors, NGOs, faith-based organizations, and private sector partners with a common commitment to literacy, and a nationwide public awareness campaign aims to develop a culture

of reading.⁷⁹ At a regional level, the Association for the Development of Education in Africa (ADEA) hosts a working group on TLMs, advocates for sector improvements, and creates forums for policy dialogue.⁸⁰

The limited number of rigorous, publicly available evaluations makes it difficult to draw strong conclusions about these past interventions. However, the evaluations that are available suggest some evidence of success does exist. For example, an evaluation of Room to Read's approach to book provision and usage demonstrated an impact on children's reading habits in three of five countries in which the evaluation was conducted.⁸¹ Additionally, a review of the Book Flood experiments that have been tried in Fiji, Singapore, Sri Lanka, South Africa, Solomon Islands, and several other countries suggests that this approach may be able to double the rate of literacy acquisition.^{82,83}

Despite these varied efforts and some successes, low textbook and reading book availability remains a concern. Many reasons may exist including that often these efforts have been limited in scale or timeframe, thus unable to instigate systemic change. They may not be efficiently implemented or may lack coordination with other education projects aimed at improving education quality overall. They may also not be designed with full consideration towards creating an environment for sustainable provision (e.g., incorporating capacity building of the marketplace and book chain actors).⁸⁴ The most common causes of poor TLM availability are inefficient spending, higher than necessary costs, under-financing by governments in some cases, and high levels of loss and damage in distribution and school storage and management.⁸⁵

⁷⁶ Tanzania Case Study—see Annex 3.

⁷⁷ Room to Read. (2015).

⁷⁸ Philippines Case Study—see Annex 3.

⁷⁹ Rwanda Case Study—see Annex 3.

⁸⁰ Sow, M. Aliou. (2015). Association for the Development of Education in Africa (ADEA). Interview conducted by R4D. 2 December 2015.

⁸¹ Room to Read. (2014). *Annual Report 2014: Solving the puzzle: Children's literacy and girls' education*.

⁸² Elley, W.B. (2000). The Potential of Book Floods for Raising Literacy Levels. *International Review of Education*, 46(3), 233–255.

⁸³ The Book Flood approach combined the provision of a high interest reading book library, regular silent reading periods and storytime, and teacher training to facilitate reading acquisition for early grade children.

⁸⁴ Read, T. (2015)

⁸⁵ The most common causes of low reading book availability are further elaborated upon in section 2.2.

Many of the larger-scale examples and the evidence on barriers to books provision come from textbooks, given the limited evidence in reading book provision to date. However, any reading book intervention can and should draw upon the valuable lessons learned from textbook provision. These long-standing barriers to books provision suggest that a business-as-usual effort is no longer a viable solution, whether for textbooks or for any new initiative in reading books. A fundamental shift is needed, and the proposed “Global Book Fund” (GBF) could provide that transformational opportunity.

1.3. Building on experiences from funds in health

A transformational change has been seen in the last fifteen years in the architecture of global health, with the creation of many new institutions, partnerships, and initiatives accompanied by an unprecedented increase in both funding for and attention to health issues in low and middle income countries.⁸⁶ In particular, a number of new mechanisms for raising and channeling development assistance for health have emerged. These new mechanisms, which we will refer to loosely as “global health funds,” may offer useful lessons for the value, feasibility, and design of a new international mechanism for increasing access to books in schools in developing countries.

Relevant global health funds identified as potential useful models include:

- ▶ Gavi
- ▶ GFATM
- ▶ UNITAID
- ▶ The RMNCH Trust Fund
- ▶ Middle-Income Countries Strategy for Immunization
- ▶ Power of Nutrition
- ▶ Global Financing Facility

To capture lessons from financing mechanisms in the health sector, consultations were held with several prominent experts in global health financing who have considerable knowledge of and experience with the global health funds (see Annex 2 for list of experts consulted). In addition to many specific points, several broad themes emerged from these conversations:

- ▶ Do not neglect *demand*: without strong demand from end-users and relevant government departments, donor-driven efforts to increase the availability of an intervention or commodity will have little impact. In the case of books, a lack of awareness about the value of books which results in a lack of demand from teachers and parents and low priority accorded by ministries of education may be root problems in most countries.
- ▶ Consider a commodity or intervention in the context of a broader *system*: books will do little good if teachers are not trained to use them and other prerequisites of quality education are not in place.
- ▶ Focus on *distribution systems*: making supply chains work may be more important than reducing the purchase price of a commodity in some settings. Some progress has been made in improving supply chains for health commodities, and some of the successful approaches may be applicable to books.
- ▶ Prioritize better *data*: without good data—on procurement, on distribution, on availability in schools, and on use—it will be difficult to identify and address bottlenecks and to show that strategies are working.

These lessons, their applicability to the book chain, and a more systematic analysis of the applicability of global health fund models for a GBF are discussed further in Section 2.3.

⁸⁶ Szlezak, N.A., et al. (2010). The global health system: actors, norms, and expectations in transition. *PLoS Med*, 7(1).

2. Findings from country studies and consultations with stakeholders

We present our findings in three sections. Section 2.1 explains the methodology used in this report. Section 2.2 presents our findings along each line of inquiry of the book chain. Analyses considered that were found to be low-priority or having lower potential for impact are also noted. Finally, section 2.3 presents our analysis of global health funds models and their applicability to the scope and design of a GBF.

2.1. Methodology

Primary data collection in a pre-selected group of countries was used to provide evidence and to contribute context-relevant data to strengthen the overall GBF business case and approach.

Country studies were undertaken in 13 countries:

- | | |
|--|---|
| ▶ Bangladesh | ▶ Pakistan (specifically, Sindh province) |
| ▶ Ethiopia | |
| ▶ Haiti | ▶ Philippines |
| ▶ India (specifically, West Bengal) | ▶ Rwanda |
| ▶ Kenya | ▶ South Sudan |
| ▶ Niger | ▶ Tanzania |
| ▶ Nigeria (specifically, the Hausa-speaking regions) | ▶ Uganda |

The six countries indicated in bold were selected for in-depth study, with country consultants conducting on-the-ground research and gathering data for analysis from a range of stakeholders.

In the remaining countries, the R4D-IEP team conducted a mix of desk study and primary research; brief research visits were used to interview key stakeholders, and any themes or questions raised during the desk research were clarified.⁸⁷

Some very limited inventory work was also undertaken in five of the six countries selected for in-depth study to illustrate the availability and gaps in reading books for primary grades.⁸⁸

Our analysis covered the following key lines of inquiry:

- ▶ *Demand channels and usage:* Consultations at the country and regional level attempted to better understand the various factors influencing demand, sources of demand, and the magnitude and size of each.
- ▶ *Procurement:* Data on current procurement practices, lead time, and associated considerations were gathered to identify opportunities for savings and efficiency gains.
- ▶ *Distribution:* Conversations with reading book distributors at the country and regional level focused on the processes for distributing reading books to schools through both the private and the public sector, the cost and efficiency of current distribution practices, and potential areas for improvement.
- ▶ *Publishing:* Consultations covered content availability, costs of authorship, and the implications of copyright and licensing issues for reading books.

⁸⁷ Note that logistical circumstances and timing meant that in Pakistan and Ethiopia interviews were conducted remotely and not in-person.

⁸⁸ Inventory work was not undertaken in Kenya where it was already completed through the DERP study (RTI International. [2015a].).

- ▶ *Printing:* Questions were posed to global, regional, and local printers on the current pricing breakdown of reading books based on different specifications in order to shed light on the scope for the lowest cost printing options consistent with required quality and reliability.
- ▶ *Financing:* Consultations with MOEs, policymakers, and donors were used to try to estimate the approximate annual expenditure on books.

The lines of inquiry described above provided the basis for standardized protocols (i.e., questionnaires) which were developed and tailored to the different stakeholder categories to be consulted including policymakers, donors, publishers, printers, and implementers. The use of protocols also served to ensure that consistent lines of inquiry were being probed in all countries. Extensive interviews were then conducted at the country level with multiple respondents consulted within each stakeholder category, ensuring that we had a range of data points and perspectives. A total of 288 stakeholders were consulted at the national and local levels: 62 publishers, 21 printers, 25 representatives from donor and multilateral institutions, 34 individuals from NGOs and implementers, 75 government agency

staff and policymakers, 45 school teachers and administrative staff, 14 distributors and booksellers, and 12 individuals from other relevant organizations. Details can be found in Annex 1. Where possible, respondents were also asked to provide research and other material. The data obtained from the country studies was also carefully analyzed by the authors to assess quality and accuracy.

In addition to the country studies, global stakeholder consultations with fund experts in health were conducted to enable us to apply relevant experiences from other sectors—both globally and at the country level—when building a business case for a fund for books. Interviews were also conducted with other regional and international experts who have knowledge in procurement and provision of books and other commodities, as well as in implementation of reading programs and deep knowledge of the evolution of funds in other sectors.

Over 100 expert stakeholders were identified for consultations. Of these, 70 were interviewed through in-depth in-person and phone interviews (Figure 3). The full list of global stakeholders is available in Annex 2.

Figure 3. List and categories of interviewed global stakeholders



2.2. Findings along each line of inquiry of the book chain

Although the scope of the feasibility analysis was primarily focused on reading books, the dearth of literature on reading books meant that much of the evidence cited relates to textbooks. Where possible, our findings specifically focus on reading books; in other instances, we surmise the challenges in reading books using data from textbook provision practices.

2.2.1 Demand, planning, and financing of books

Finding 1: *Lack of awareness among governments, parents, and teachers of the value of reading books in supporting literacy.*

One common issue in low and middle income markets is skepticism about the value of reading books, especially in local languages. For example, in Kenya, teachers widely opt to use English as the LOI from nursery through to all other levels, often with strong support from parents who perceive English to be the language of economic advantage.⁸⁹ Our research found that the value placed on reading books is often lower than that on textbooks, and there is an alarming lack of understanding amongst MOEs and other developing country government actors on the importance of reading books to early grade literacy. One expert stakeholder commented that MOEs often focus on textbooks before considering reading books,⁹⁰ creating a crucial gap in building literacy and developing a culture of reading.

Parental and teacher understanding of the value of reading books (Box 3) also remains low in many countries. Anecdotal evidence shows parents in Asia and Africa have been reluctant to buy reading books for young readers—regardless of language and

Box 3

“The importance of a good supply of reading books in improving reading and literacy is not widely appreciated by lower primary teachers...”

Source: India Case Study—see Annex 3.

format (print or digital)—because of the few number of words on each page.^{91,92} Where awareness of the role of reading books does exist, both parents and governments also promote languages such as English or French over local languages, due to the perceived lower value of local language titles. High parental illiteracy rates (projected at 62% for women and 76% for men in SSA in 2015) that hinder the understanding of the importance of books as well as high poverty rates that make books unaffordable in some cases are other factors contributing to limited demand, especially when combined with high book costs as mentioned in section 1.1.⁹³

Publicity and advocacy campaigns to increase awareness of the importance of reading books, and subsequently raise demand, are therefore essential components of literacy initiatives and any new global mechanism.^{94,95}

Finding 2: *Lack of data on book provision and learning outcomes limits the ability to assess progress, identify inefficiencies, and mobilize appropriate resources. A GBF could play a key role in (a) providing funding or technical support to implement improved in-country data systems, (b) making country-level data collection a requirement for GBF book funding, and/or (c) hosting or supporting an online data sharing platform.*

Unlike the health and agriculture sectors which have publicly available data on both inputs and outcomes, there is extremely limited data in the education

⁸⁹ Kenya Case study – see Annex 3.

⁹⁰ Crabbe, Richard. (2015).

⁹¹ Berger, Alisha. (2015). Room to Read. Interview conducted by R4D. 18 August 2015.

⁹² Cahjadi, Robbi. (2015). ProVisi Education. Interview conducted by R4D. 5 August 2015.

⁹³ Fredriksen, B., Brar, S., and Trucano, M. (2015).

⁹⁴ Berger, Alisha. (2015).

⁹⁵ Zacarias, Dani, Tam, Tina, and Lowe, Zev. (2015). Worldreader. Interview conducted by R4D. 24 September 2015.

sector to track key indicators of progress.^{96,97} Such indicators are not well-defined, let alone tracked, in a systematic way at the country or global levels. The result is an extremely limited evidence base from which to assess progress, identify inefficiencies, and advocate for the resources and policy changes needed to address them.

There are currently efforts underway to improve the collection and availability of key education indicators. Most notably, the GPE has made the development of harmonized education metrics a key part of its strategy. In collaboration with the Learning Metrics Task Force (LMTF),⁹⁸ the GPE is in the process of developing a proposal for an international platform to fund and provide technical support for regional and national learning assessments, with the perspective that such assessments should be a public good.⁹⁹

However, because this effort appears to be focused on high-level outcome and financing indicators, there is still a gap relating to data collection and management, specifically for book provision. Our country case studies and other research¹⁰⁰ indicate that nearly all countries studied (with the possible exception of Rwanda) lack essential education management information system (EMIS) data with which to plan and deliver adequate supplies of textbooks and reading books. Gaps in EMIS provision vary from country to country but include up-to-date lists of schools and their grade-level enrollments, school-based data on TLM stocks and loss rates, and the annual budget required to achieve and sustain textbook and reading book targets. Where mother tongues are used as LOIs, there is typically inadequate data on the location and grade-level enrollment of different languages, thus making print runs and distribution matters of guesswork. Efforts to increase the availability of books will be hampered if such data is not available to forecast demand,

plan procurement, and identify bottlenecks and inefficiencies along the book value chain.

Given these issues, a GBF could play a key role in (a) providing funding and/or technical support to countries to implement improved data systems, (b) making country-level data collection a requirement for GBF book funding, and/or (c) hosting or supporting an online data sharing platform.

- a) **Fund technical support for in-country data system design and implementation.** As a complement to the work of the GPE and LMTF, the GBF could work in parallel to support the design, implementation, and/or improved use of data systems for book provision. This could include EMIS and TLM management systems to plan book spending and to track procurement and availability, as well as “track and trace” and other supply chain management systems which are crucial to addressing sources of loss.¹⁰¹ Indeed, in some countries donors are providing this type of support. For instance, as mentioned in section 1.2, the GPE recently provided funding for the Rwandan Ministry of Education to create a TLM tracking system that allows access to data on book procurement, stock levels, and book usage in every classroom.¹⁰²
- b) **Make country data collection a requirement for GBF book funding.** Assuming that the GBF takes a role in funding books, country requirements to receive such funding could include reporting book procurement data. In the health sector, organizations like the GFATM have taken a similar approach which has significantly improved transparency in the markets for key health commodities and underpinned various market-shaping interventions. As mentioned above, data gathering could also be directly

⁹⁶ UNESCO. (2016a). Every Child Should Have a Textbook. *Global Education Monitoring Report*, Policy Paper 23.

⁹⁷ Fredriksen, B., Brar, S., and Trucano, M. (2015).

⁹⁸ For more information, see <http://www.uis.unesco.org/Education/Pages/learning-metrics-task-force.aspx>

⁹⁹ Global Partnership for Education. (2014). *Results for Learning Report 2014: Basic Education at Risk*.

¹⁰⁰ Read, T. (2015).

¹⁰¹ Yadav, Prashant. (2015). William Davidson Institute (WDI) at the University of Michigan. Interview conducted by R4D. 1 December 2015.

¹⁰² Global Partnership for Education. (n.d.).

supported by the GBF, at least initially, depending on the capability of countries to undertake this on their own.

c) **Fund or host an online data sharing platform.**

Lessons from health may be instructive when considering how to publicly share data. For example, after the GFATM collects procurement data from recipient countries, it makes this data available publicly in aggregated form through its online Price & Quality Reporting (PQR) tool. Similarly, the World Health Organization (WHO) hosts a database called the Global Price Reporting Mechanism (GPRM) which aggregates data from the GFATM and various other purchasers. These public procurement databases have underpinned market-shaping interventions by allowing for more accurate and nuanced analysis of evolving market conditions (e.g., prices, volume levels, product mix). A similar mechanism in the education sector could similarly help with identifying and addressing market inefficiencies, and the GBF could play a direct (hosting) or indirect (funding) role in creating this public good. This database could start with procurement data similar to the health examples, though could also potentially expand in coordination with GPE, LMTEF, and other partners to include additional relevant data (e.g., around usage, title availability, book-to-pupil ratios, and funding).

Importantly, the data emerging from these systems must be effectively used by decision makers. Specifically, such systems could be linked to book budgeting and policy making processes to ensure that the data gathered is appropriately utilized when making decisions related to book provision.¹⁰³

Finding 3: *To meet a theoretical minimum book standard for all pre-primary and primary students, low and middle income countries*

need to spend between US\$3.1 billion – US\$3.9 billion yearly. However, research is needed to understand a more realistic, current, addressable market size.

Sizing the amount of resources needed to fulfill the largest potential need for books is critical to assessing whether there are sufficient funds available and to identifying key savings drivers from interventions to improve efficiencies.

For the textbook and reading book market, a significant amount of resources is required—US\$3.1 to US\$3.9 billion annually for book costs alone¹⁰⁴—to meet the theoretical minimum standard needs (see Box 4) in the target population. The range is from US\$1.9 to US\$2.6 billion when accounting for low income and lower middle income countries only

Box 4. Minimum Standards for Text and Reading Books in Primary School and Cost Parameters

Textbooks: 5 textbooks per pupil per grade. 1:1 Pupil to Textbook Ratio. US\$2 per unit textbook cost and 3-year book lifespan. Annual per student textbook cost of US\$3.3

Reading books: 42 book titles per school year per pupil. US\$1.74 unit cost. Annual per student book cost of US\$1.74

Sources:

Various expert interviews

Fredriksen, B., Brar, S., and Trucano, M. (2015). *Getting Textbooks to Every Child in Sub-Saharan Africa: Strategies for Addressing the High Cost and Low Availability Problem*. Washington, DC: World Bank.

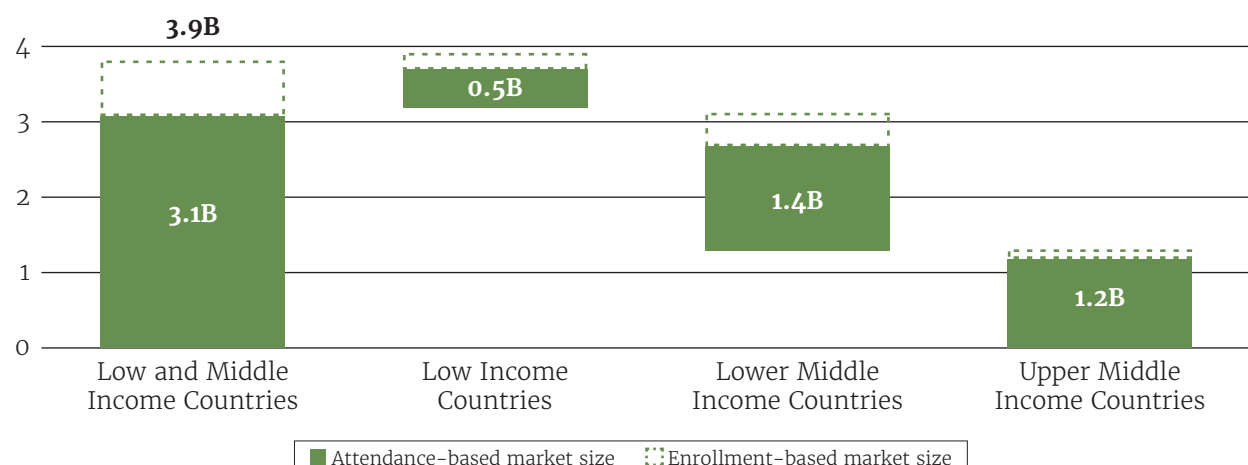
Notes:

- a. These are very rough estimates: in most developing countries, 5 textbooks per students would not meet upper primary requirements. For example, Vietnam requires 5 textbooks per pupil per grade in Grades 1–3 and 9 in Grades 4–5.
- b. Reading book annual per student costs assumes that the book life is only one year. If longer, the cost would drop.

¹⁰³ Naidoo, Jordan. (2016). UNESCO. Interview conducted by R4D. 24 March 2016.

¹⁰⁴ This figure does not account for projections that include population growth or scale-up scenarios such as currently out-of-school children enrolling in formal education. Calculations are based on UIS enrollment data (UNESCO. [2015c]. UIS Database.) and annual per student book cost. The annual per student reading book cost is derived from DERP average price (RTI International. [2015a].). Annual per student textbook data is derived from Fredriksen, B., Brar, S., and Trucano, M. (2015).

Figure 4. Theoretical market size of minimum standard needs for textbooks and reading books in target population^{105,106}



(Figure 4.) The need for textbooks comprises two-thirds of this market, while reading books make up the remaining one-third.

The figures are calculated by multiplying annual per student book cost with pre-primary and primary enrollment for low income, lower middle income, and upper middle income countries. Appendix 1 contains details on our methodology.

It is important to note that this market size represents theoretical need, which does not equate to the actual market size. To gain a realistic understanding of the resources required to meet *current demand* for such books more in-depth studies are required. Current publicly available data neither robustly nor comprehensively accounts for school, teacher, or student demand for textbooks and reading books. However, as presented in Finding 1, the lack of awareness about the importance of reading books means that there is currently weak demand in low and middle income markets. Therefore, we caution that calculating the *current actual* market size may underestimate the true market demand which may

only be revealed once there is greater awareness and advocacy around the value of reading books.

Finding 4: *Analysis of primary education spending reveals an underfinancing of books, including textbooks and reading books. To meet minimum book standards, out of 32 countries studied, 18 face significant annual budget gaps that total nearly US\$200 million. However, improving spending efficiency, rather than raising absolute funds, is a priority for half of LMICs and all UMICs.*

Past studies have attempted to measure the share of primary education budget needed for books. The Global Education Monitoring Report Policy Paper recommends that at least 3–5% of the primary education budget should be spent on textbooks.¹⁰⁷ In the mid-1990s, the (former) Organization of African Unity advised member states to allocate a minimum of 14% of the primary education budget on TLMs. However, analysis of primary education spending for 32 countries¹⁰⁸ indicates that average TLM spending

¹⁰⁵ Enrollment data calculated using UNESCO Institute for Statistics data. UNESCO. (2015c).

¹⁰⁶ This comparison was made as no additional investments in efforts to increase enrollment was assumed. Although not a perfect measure, attendance data is used to address the fact that enrollment data may sometimes over-report actual numbers of students in classrooms. Attendance estimates are based on most recently available adjusted new attendance rates for primary education reported by UNESCO Institute for Statistics. An average attendance rate was calculated from the range of attendance in all available countries and for each World Bank region. For low income countries, attendance is estimated as 67.5%; for lower middle income countries attendance is estimated as 76.5%; for upper middle income countries, attendance is estimated as 92%. UNESCO. (2015c).

¹⁰⁷ UNESCO. (2016a).

as a percentage of primary spending is well below these proposed targets. TLM spending as a percentage of primary spending was 2% between 2010 and 2014, with little variance between country income levels.^{109,110,111} Mean TLM spending was 2% of primary expenditure for LICs and LMICs and 3% for UMICs.

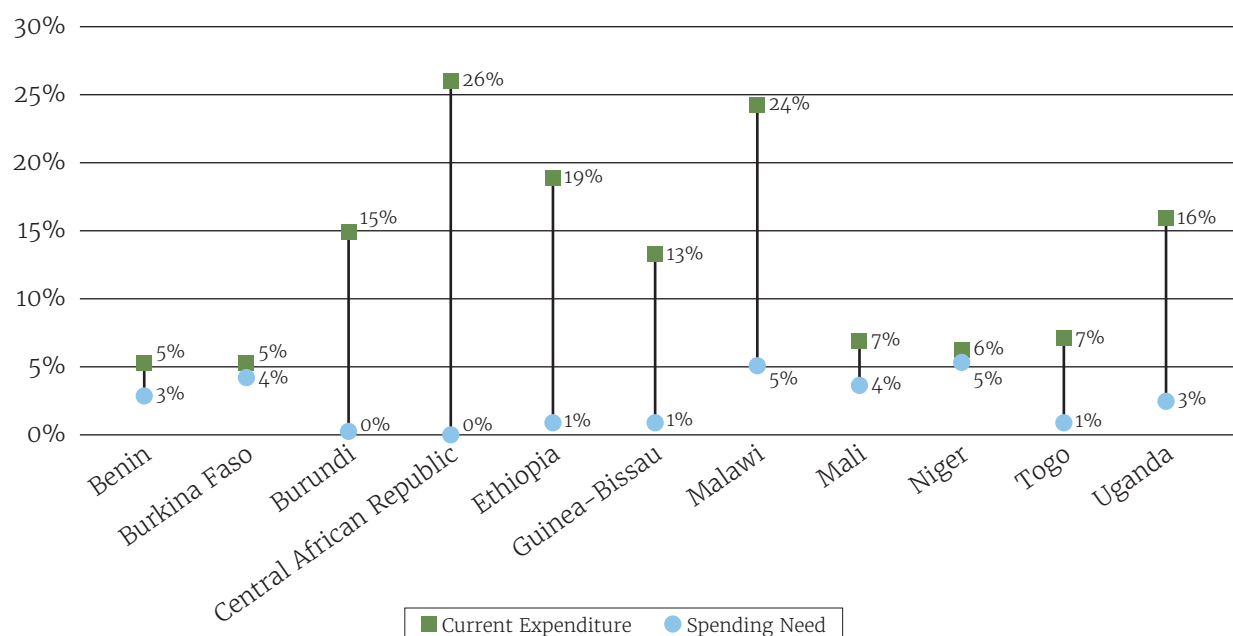
Almost all our country studies reinforce the inadequate spending on primary reading books. For example, Tanzania, Bangladesh, and Pakistan make no provision for reading books in government budgets. In India, state governments rarely, if ever, fund the provision of reading books in any language.¹¹² Other recent literature also confirms this. For example, underfinancing of books has also been seen in Zambia, Malawi, and Guinea.¹¹³ Moreover,

it is widely believed that even when governments budget for TLMs, spending is completely directed to textbooks, which leaves little or no domestic financing for reading books.^{114,115,116}

In order to meet certain minimum standards recommended by experts (Box 4), analysis indicates that countries may need to spend between 0.6 to 26% of current primary education spending on TLMs; the wide range is a result of country income levels (Appendix 4).

LICs would need to spend between 5 and 26% of primary spending on TLMs to meet minimum standards of book provision (Figure 5).¹¹⁷ Comparing actual TLM spending (2010–2014 average) with total

Figure 5. TLM Spending Need as a percent of Primary Expenditure to meet minimum book standards, LIC¹¹⁸



¹⁰⁸ As can be seen in Appendix 4, 32 LIC, LMIC, and UMIC countries were selected for analysis based on data availability.

¹⁰⁹ Primary education spending and TLM spending averages between 2010 and 2014 were used in the analysis.

¹¹⁰ It should be noted that governments include textbook and reading book budgets under TLM spending. Even though TLM expenditure includes spending on materials other than books, it remains the closest indicator of government book spending.

¹¹¹ As explored later in the section, it should be cautioned that one explanation for this low figure is that donor aid for TLMs, which accounts for a considerable portion of book financing, is often excluded from government budget lines altogether.

¹¹² India Case Study – see Annex 3.

¹¹³ Read, T. (2015).

¹¹⁴ Fredriksen, B., Brar, S., and Trucano, M. (2015).

¹¹⁵ Read, T. (2015).

¹¹⁶ Synthesis from global expert interviews and Country Case Studies—see Annex 3.

¹¹⁷ As described in Box 4, our calculation assumes a conservative reading book life of one year. Countries would need to spend a lower share of primary spending on TLMs if the assumed book life is increased.

¹¹⁸ UNESCO. (2015c).

estimated costs for text and reading books reveals a funding gap of nearly of US\$162 million for the 11 LICs in our sample.^{119,120} Six countries in particular would need to spend over 10%. These are Burundi, Central African Republic, Ethiopia, Guinea-Bissau, Malawi, and Uganda. Details on individual spending requirements for textbooks and reading books separately can be found in Appendix 4. In general, the required spending for textbooks is nearly double that for reading books.

For UMICs and LMICs, the median TLM spending as a percentage of primary spending needed to meet minimum standards is lower. For LMICs, between 1 and 2.8% of primary education spending is needed for adequate TLM provision. For UMICs (excluding Kazakhstan), the estimated spending need is around 0.2 to 1.1% of primary education spending. Five LMICs have a funding gap totaling US\$30 million.¹²¹

For many LIC countries, closing the funding gap entirely through domestic resources appears difficult

in the short term (see Figure 6). It would take over 5 years or more for Burundi, Ethiopia, Guinea-Bissau, and Togo to meet minimum standards if the share of TLM spending remains constant to the growth rate of primary education spending. For example, even with primary spending growth rates of 11% and 31%, it would take Ethiopia and Guinea-Bissau 17 and 10 years, respectively, to meet their current required spending needs if TLM spending remained at 1%.

However, results should be interpreted with caution. As noted by UNESCO Institute for Statistics (UIS), “not all countries track expenditure on TLM in a separate budget line, which partly explains low coverage, and when countries do, it may not follow comparable definitions or be done properly, which means the data may not be of the highest quality.”¹²² Block grants and donor aid for TLMs, which account for a considerable portion of book financing, are often excluded from

Figure 6. Years to meet minimum standards given current budget projections, LIC

Country	Annual growth in primary education spending	Expected TLM spend	Funding gap	Years to meet
Burkina Faso	17%	13,166,403	13,160,348	—
Burundi	0.4%	202,046	10,384,068	51
Cameroon	1%	8,314,350.93	21,017,679	3
Ethiopia	11%	4,729,623.90	79,820,154	17
Guinea-Bissau	31%	140,017	1,414,902	10
Malawi	33%	5,713,798	20,783,488	4
Mali	30%	8,468,402	11,068,070	1
Niger	44%	13,043,116	11,552,087	—
Togo	16%	1,176,855	7,169,675	6

¹¹⁹ Government TLM spending data was provided by UIS. However, figures should be interpreted with caution for the following reasons: (1) Not all countries track expenditure on TLM in a separate budget line, which partly explains the low coverage of countries in the data set. When countries do track expenditure, it may not follow comparable definitions or be done properly, which means the data may not be of the highest quality; (2) The data set only captures TLM spending reported under current expenditure. Some countries classify TLM spending as capital expenditure; and (3) In some developing countries, expenditure on TLM may be funded quite heavily by donors. Donor expenditure, which is often not part of government budgets, may not be included in the data.

¹²⁰ Estimates of required TLM spending as a percentage of primary spending are calculated as follows: (Total cost for text and reading books (minimum standards)) / (Actual Primary spending (2010–2014, average)) x 100”

¹²¹ Funding gap breakdown: US\$167 million for LICs, US\$30 million for LMICs, and US\$3 million for UMICs.

¹²² UNESCO. (2015c).

government budget lines altogether. Many countries do not have national education accounts and governments have been hesitant or unable to share their budget/spending in our attempt to collect primary data.

Identifying levels of external financing for books has been equally if not more challenging. Even though global and country level stakeholders interviewed repeatedly stated that reading books are funded almost entirely by donors, the exact amount of donor assistance is unclear.

The DAC-Creditor Reporting System database, which provides comparable data on donor funding, does not disaggregate disbursements by books. Donor book projects are often financed under larger education projects making the delineation of book financing difficult to report.¹²³ Moreover, major education donors were unable to provide data on their textbook or reading book spending for this study.

As a result, there is only scattered evidence on levels of donor spending. It is estimated that 72% of the 110 education projects financed by the World Bank in 40 SSA countries between 1985 and 2000 included support for textbooks.¹²⁴ USAID is spending more than US\$1 million per year on book procurement for a single grade in just one country.¹²⁵

Finding 5: *There are three distinct categories of countries exhibiting different financing needs, thus requiring different types of support from a GBF:*

- ▶ Group 1 countries do not spend enough on both textbooks and reading books and do not have the capacity to increase spending.
- ▶ Group 2 countries also have significant funding gaps but improved efficiency could help counter some of the gap.
- ▶ Group 3 countries do not face funding gaps.

Analysis shows that there are three distinct categories of countries. Group 1, consisting of all LICs and five LMICs in our sample selected for analysis, do not spend enough on both textbooks and reading books to meet any kind of minimum standard. As explored in Finding 4, comparing actual TLM spending (2010–2014 average) with total estimated costs for text and reading books shows a funding gap of nearly of US\$162 million. For some of these countries, relying on domestic sources of financing to meet minimum standards remains difficult as shown above. As discussed later in the report (Section 2.3), adopting country eligibility practices from health funds such as RMNCH which targeted a subset of countries may be most applicable for a GBF. The GBF may therefore need to help these countries fully finance the purchase and delivery of books for some time, until economic or budget growth makes the necessary expenditures affordable. Examples of these countries include Burundi, Ethiopia, and South Sudan.

Group 2 consists of LICs and LMICs that have significant funding gaps, but required spending levels may be achievable given past primary spending growth rates. For the majority of LMICs and UMICs, current spending already meets the cost of minimum standards, suggesting that improved efficiency in spending rather than increased absolute spending should be encouraged. These countries should be urged to increase their spending on books, along with other measures. The GBF can help with advocacy, co-financing, technical support, but not long-term funding to supplement book budgets. Examples of countries in this category include Burkina Faso, Mali, and Niger.

Group 3 countries are mostly LMICs and UMICs that already spend more than the estimated required amount. For these countries, absolute availability of resources is not the main problem, and instead, greater efficiencies and policy changes may be needed to allow them to meet their book needs from current spending. Examples include Colombia, Dominican Republic, and South Africa.

¹²³ Donor organizations were unable to provide quantitative data on textbook or reading book financing from their organizations.

¹²⁴ Fredriksen, B., Brar, S., and Trucano, M. (2015).

¹²⁵ Bender, Penelope. (2015). Correspondence with R4D. March 2016.

2.2.2 Procurement and production of books

Finding 6: *There is an inadequate supply of appropriate mother tongue reading book titles due to low awareness of the value of reading books, limited authorship capacity, and lack of content sharing arrangements. Given these challenges, the GBF could, at the global level, serve as or support a content repository to expand access to published titles, and at the country level, support the growth, sustainability, and quality of local publishing industries as needed.*

Despite the existence of local publishing capacity in nearly all surveyed countries,¹²⁶ production of

children’s reading books in many countries is lacking in both quantity (number of available titles)¹²⁷ and quality (alignment with best practice pedagogical principles). The use of mother tongues as LOIs in early grades in some countries makes the availability of reading materials particularly acute for certain local languages. As seen in Figure 7, there is wide variability across countries and languages in terms of the number of available titles, with only 14 titles identified in one language in Malawi on the low end. Data from this same study also reveals many “neglected” languages for which no titles were found, though it is unclear how many of these languages are LOIs.

Figure 7. Number of reading book titles found in a sampling of 4 countries¹²⁸

Country	Three African Languages with the Most Titles Surveyed in Country	ISO Language Code	Estimated Population of Native Language Speakers in That Country	Number of Titles Surveyed in That Country	Percentage of Titles Surveyed in That Country
DRC	Lingala	lin	2,040,000	105	22.9%
	Koongo (Congo/Kikongo)	kng	3,000,000	88	19.2%
	Ngbaka	nga	1,010,000	70	15.3%
Ethiopia	Amharic	amh	21,600,000	366	61.2%
	Afan Oromo	gaz	8,920,000	52	8.7%
	Bench	bcq	347,000	36	6.0%
	Suri	suq	26,900	36	6.0%
Kenya	Swahili	swh	111,000	424	41.5%
	Kamba	kam	3,893,000	70	6.8%
	Maasai	mas	842,000	54	5.3%
Malawi	Chichewa	nya	7,000,000	309	87.3%
	Tumbuka	tum	2,200,000	18	5.1%
	Yao	yao	2,200,000	14	4.0%

¹²⁶ Country Case Studies—see Annex 3. Exception is South Sudan which has local authorship but not publishing capacity.

¹²⁷ Global Partnership for Education. (2013). As noted in the report, data on availability of reading materials in mother tongue for early grades is extremely limited. However, implementing NGOs such as Room to Read, Save the Children, and others have consistently reported a lack of reading materials such that they have had to publish their own to populate their libraries.

Davidson, M. (2013). *Books that Children Can Read: Decodable Books and Book Leveling*. Washington, DC: USAID.

¹²⁸ Note: According to the Ethnologue—a web-based publication by SIL International that provides statistics on more than 7,000 languages—there are only 111,000 native speakers of Kiswahili in Kenya; in reality, the total number of speakers (L1 and L2) must be larger, as it is a national language of Kenya and a lingua franca within Kenya and Southeast Africa. The total number of Swahili speakers in Africa is estimated by Ethnologue to be at 15,437,390. No other sources with estimates of the total Swahili-speaking population in Kenya could be found for this study. SIL International. (2015). *Ethnologue*.

Figure 8. Percentage of Textbook-Related Materials with Specific Pedagogical Components¹²⁹

Country	Phonics	Vocabulary	Reading Passage	Comprehension Questions	Writing	Grammar	Other
DRC	46.0%	19.0%	93.0%	32.0%	17.0%	11.0%	15.0%
Ethiopia	70.0%	86.0%	79.0%	61.0%	77.0%	13.0%	17.0%
Kenya	36.0%	47.0%	24.0%	15.0%	31.0%	30.0%	36.0%
Malawi	42.0%	61.0%	79.0%	42.0%	40.0%	7.0%	49.0%
Mali	58.0%	27.0%	72.0%	34.0%	19.0%	20.0%	12.0%
Mozambique	9.0%	29.0%	81.0%	81.0%	73.0%	40.0%	5.0%
Nigeria	70.0%	79.0%	79.0%	70.0%	57.0%	36.0%	5.0%
Senegal	54.0%	39.0%	60.0%	39.0%	43.0%	26.0%	30.0%
Tanzania	20.0%	35.0%	38.0%	34.0%	33.0%	7.0%	54.0%
Uganda	28.0%	76.0%	65.0%	30.0%	12.0%	6.0%	20.0%
Zambia	37.0%	89.0	66.0	46.0%	46.0%	28.0%	6.0%
Overall	43.0%	60.0%	66.0%	41.0%	36.0%	20.0%	19.0%

The quality of titles is more difficult to quantify; however data in Figure 8 shows that there is also large variation amongst countries in the percentage of textbook-related materials that include best practice pedagogical approaches. When considering the example of phonics,¹³⁰ only 9% of titles identified in Mozambique used a phonics approach vs. 70% of titles in Ethiopia and Nigeria. Though phonics is just one of several approaches to the teaching of reading and writing, and MOEs decide whether or not phonics is their selected vehicle, this highlights the wide variability in content and pedagogical standards across countries.

These challenges with the quantity and quality of reading book titles result from low awareness of the value of reading books (which constrains demand, as described in Finding 1), lack of financing, inadequate specification by MOEs, and limited authorship capacity to develop decodable, leveled, and culturally appropriate reading books—particularly in mother

tongue languages. In some countries, NGOs more so than publishers are undertaking content generation for reading books given that the demand and funding for new material, particularly in mother tongues, does not allow for sufficient publisher profits. (It is important to note that this is more often the case for mother tongues and local languages than for international and regional languages.) NGOs, donors and language institutes currently provide authorship services in an uncoordinated manner and often from one-time, donor-funded projects that fail to sustain continued authorship once funding ends.^{131,132,133}

Amongst the titles that are published, access is far lower than it could be due to a lack of coordination and content sharing amongst donors, NGOs, and MOEs. For example, NGOs such as Room to Read and Save the Children commission local authors to develop culturally appropriate stories in indigenous languages, but these titles are only available in these NGOs' program sites plus occasional donations to other

¹²⁹ RTI International. (2015a).

¹³⁰ RTI International. (2015a).

¹³¹ Butcher, Neil. (2015). Neil Butcher and Associates. Interview conducted by R4D. 19 November 2015.

¹³² Baker, Judith. (2015). African Storybook Project. Interview conducted by R4D. 16 November 2015.

¹³³ RTI International. (2015a).

NGOs.¹³⁴ One expert also noted poor digital archiving practices^{135,136} resulting in significant loss of titles.

Finally, intellectual property arrangements are not set up to facilitate content sharing. Use of Creative Commons (CC) licensing is low,¹³⁷ and copyrights are often unclear or cumbersome to manage, which prevents titles from being translated and/or reprinted for wider distribution. Even amongst established international publishers (e.g., Scholastic), there can be a reluctance to license content due to a fear of uncontrolled illegal reproduction.¹³⁸ Furthermore, setting up content sharing schemes would require high transaction costs, as content access would need to be negotiated with individual authors and illustrators who typically retain copyrights.

Importantly, these challenges are specific to the reading book market and appear much less relevant for textbooks. Government funding for textbooks, while still inadequate, is significantly greater than for reading books, and content development processes and standards are better developed.¹³⁹ In certain countries, textbooks are still produced by state-run publishing houses (e.g., India), as was the trend in the 1960s–1980s; however, increasingly this is being replaced with private publishing of multiple, competing textbooks from which schools or governments can place orders.^{140,141} In a typical case, the government will bid (as is typically done in Anglophone Africa) or commission (as is typically done in Francophone Africa) textbook development from local, private publishers and/or authors according to defined curricular standards; evaluate

textbooks for quality before content is finalized and approved; and retain copyrights which allows for easy content updates and reprinting. However, even with better defined content generation processes, quality issues persist in many countries with respect to textbooks adherence to pedagogical guidelines, integration into broader instructional strategies, and efforts to neutralize gender biases.^{142,143,144}

Given these various challenges in book production and particularly for reading books in mother tongue and local languages, the GBF could (a) serve as or support a content repository to expand access to published titles, or support other content sharing mechanisms, and (b) at the country level, support the growth, sustainability, and quality of local publishing industries as needed.

- a) Measures to improve content sharing at both in-country and global levels should be further explored given the fragmentation of reading book development and restricted availability of titles. A number of stakeholder interviews also pointed to content sharing as an important step toward increasing access to mother tongue and local language reading books,^{145,146,147} particularly where financial incentives for commercial publishers are limited or nonexistent and donors, governments, and NGOs are filling the gap. Some options to consider include: increasing collaboration amongst donors, NGOs and MOEs; supporting growth of open license models, both for existing and new content (e.g., through pilot projects or catalytic grants); using technological innovations

¹³⁴ Global Partnership for Education. (2013).

¹³⁵ Butcher, Neil. (2015).

¹³⁶ Baker, Judith. (2015).

¹³⁷ RTI International. (2015a). Amongst titles in 11 sub-Saharan African countries, only three countries had 10% or more content that was published under Creative Commons licensing.

¹³⁸ Sakoian, Carol. (2016). Scholastic. Interview conducted by R4D. 2 March 2016.

¹³⁹ Fredriksen, B., Brar, S., and Trucano, M. (2015).

¹⁴⁰ Crabbe, R. A. B., Nyangi, M., and Abadzi, H. (2014).

¹⁴¹ Fredriksen, B., Brar, S., and Trucano, M. (2015).

¹⁴² Crouch, L. (2013). *New Approaches to Title Development and Book Procurement: A Book Fund?* Presentation at Comparative and International Education Society annual conference 2013.

¹⁴³ Sperling, G., Winthrop, R., and Kwauk, C. (2016). *What Works in Girls' Education: Evidence for the World's Best Investment*. Washington, DC: The Brookings Institution.

¹⁴⁴ Benavot, A. (2016). Gender bias is rife in textbooks. *World Education Blog*. Global Education Monitoring Report. UNESCO.

¹⁴⁵ Berger, Alisha. (2015).

¹⁴⁶ Nhan-O'Reilly, Joseph. (2015). Save the Children. Interview conducted by R4D. 14 August 2015.

¹⁴⁷ Baker, Judith. (2015).

to support or host a content sharing platform, such as the All Children Reading Grand Challenge for Development (ACR GCD) and the Norad-funded Global Reading Repository (currently being designed); facilitating the co-publishing of books across countries with common languages; or providing technical assistance to publishers to implement more effective licensing practices. However, additional exploration will be needed to determine the most appropriate strategies for content sharing.

Content sharing of existing titles alone could make a significant difference in reading book availability, particularly in mother tongue and local languages. Even for the language with the least published titles (Yao in Malawi, according to Figure 7), increasing availability of the 14 titles identified would represent significant progress. Thus, expanding access to existing titles—assuming they are of appropriate quality—should be prioritized above development of additional titles from a sequencing perspective.

With respect to open licensing models, although experts interviewed did not have concrete recommendations, a handful of existing efforts provide a starting point for examining how this can be done. For example, the African Storybook Project leads content development workshops at teacher colleges and aggregates finished titles in an open-source platform; users from any country in the world can then download, translate, and print the titles of their choosing.¹⁴⁸ Though this is a donor-funded initiative, other organizations such as the Molteno Institute are attempting to create content development models that are commercially viable.¹⁴⁹ The results of this exploration—some of which are already

underway¹⁵⁰—should help inform a GBF content development and distribution strategy.

- b) At the country level, the GBF could support the growth, sustainability, and quality of local publishing industries on an as-needed basis, depending on country context. Amongst all experts consulted, there was agreement that it is ideal to have local publishing industries in all countries where it is feasible. Stakeholders interviewed highlighted that children need access to both reading books that “mirror” their cultural realities as well as books that serve as “windows” to expose them to foreign worlds,^{151,152,153} and that local publishing is important to ensure that there are culturally relevant books available in appropriate LOIs. Although the importance of local publishing is difficult to quantify, consulted stakeholders noted that international publishers sometimes sell textbooks originally made for their native countries and therefore are not country- or culture-specific. It would therefore be “fundamental to increase local creation of these books to attend [to] local needs.”¹⁵⁴ In addition, publishers play the critical role of coordinating all other actors in the book value chain—a role which is more easily done by actors with local market knowledge and access.

While a long-term goal of developing sustainable local publishing industries is important, this must be balanced against the short-term need to publish a greater number of reading books, which international publishers are currently better equipped to do. Skills in editorial, design, marketing, and bookselling tend to be underdeveloped within African publishing houses.¹⁵⁵ For local language publishing, the skills gap also includes pre-authorship activities

¹⁴⁸ Ibid.

¹⁴⁹ Butcher, Neil. (2015).

¹⁵⁰ An ongoing research project led by Neil Butcher and Lisbeth Levey examines how open licensing can be integrated into the book value chain. Initial findings are expected in mid-2016.

¹⁵¹ Walter, Scott. (2015). CODE. Interview conducted by R4D. 18 November 2015.

¹⁵² Sakoian, Carol. (2016).

¹⁵³ Bonilla, E. (2006). Presentation at the International Board on Books for Young People congress in Macau, 2006.

¹⁵⁴ Milliet, Pedro. (2016). Correspondence with Penelope Bender. March 2016.

¹⁵⁵ Greaney, Vincent. (1996). *Promoting Reading in Developing Countries*. International Reading Association.

like basic language research and ethnographic gathering of stories. A GBF mechanism and/or existing education donors could support the development of publishing industries by funding capacity-building projects with local publishers and authors, potentially first prioritizing languages that correspond to LOIs in schools. This approach was undertaken in Tanzania's Pilot Project for Publishing (PPP)—a SIDA-funded initiative to strengthen the textbook sub-sector.¹⁵⁶ The PPP included writing workshops for authors to help them develop high-quality content that met curricular standards, as well as technical assistance for graphical, pedagogical, technical, and management aspects of textbook production. The PPP was considered to be generally successful in improving the quality of textbooks in Tanzania and in helping the country to develop a sustainable textbook sector, and the GBF could seek to adapt this model in other countries.

Capacity building with publishers should be pursued in tandem with measures to increase awareness and demand (e.g., securing greater and more consistent book funding), because a sustainable publishing industry cannot exist without sufficient demand and viable market opportunities.

For primary grade reading books in mother tongue and local languages where funding is often limited, it is important to highlight the tension between optimizing current content generation models—which are predominantly NGO-driven in many countries—and supporting the development of sustainable private sector publishing. It has been widely noted that subsidizing demand rather than production is better for the sustainability of publishing

industries,^{157,158,159} a perspective that is supported by examples of donor-funded publishing which have been noted to negatively impact local publishers (e.g., Kenya's Tusome project,¹⁶⁰ particularly in its preliminary phases). For this reason, a GBF role in directly funding content development was considered but discouraged by various stakeholders. However, as local publishing industries in some countries in sub-Saharan Africa do not currently have the capabilities to produce lower level reading books, supporting NGO-led content development may make sense in the short term. Ultimately, a content generation strategy will need to be developed by the GBF which takes into account this tension and considers a phased approach to achieving sustainable private sector publishing.

Another model from the health sector that was contemplated was providing advanced market commitments (AMCs) to incentivize the development of reading book titles. AMCs were developed to incentivize investment in new product development, particularly for products requiring substantial and risky R&D (e.g., GAVI uses an AMC to procure certain vaccines). For books, however, this model is not appropriate, as title development does not require large investments on the scale of drug or vaccine R&D. Assuming that new funding is made available for reading book procurement, a simpler approach of publicizing government book budgets and long-term demand forecasts (as is done for other health products, like HIV/AIDS drugs) would likely serve the same purpose but have much lower costs and complexity. The use of multi-year tenders would also be effective, particularly at the outset, in giving publishers and authors assurance that book procurement will be increasing.

¹⁵⁶ Graham, L., and Pehrsson, K. (2004). *Textbooks for all PPP—The first step on a long journey. Evaluation of the Pilot Project for Publishing in Tanzania*. SIDA Evaluation. Department for Democracy and Social Development.

¹⁵⁷ Ibid.

¹⁵⁸ Greaney, Vincent. (1996).

¹⁵⁹ Walter, Scott. (2015).

¹⁶⁰ The USAID/DFID-funded Tusome project, implemented by RTI International, developed textbooks and provided them at low cost to Kenyan public schools. This led to complaints by publishers of large textbook overstocks, financial losses, and an overall weakened publishing industry (Kenya Case Study—see Annex 3). The project has since responded by working with the publishing industry and conducting trainings to strengthen their skills, with the aim of achieving sustainable development of higher quality materials.

Finding 7: *Public sector book procurement is not always optimized for cost, quality, and sustainable supply. A GBF could play a role in (a) disseminating and incentivizing the use of procurement best practices, (b) improving the consistency and predictability of demand, and/or (c) promoting centralized pooled procurement for reading books at the national level to lower book costs.*

Public sector procurement of both textbooks and reading books is characterized by irregular and unpredictable demand. As discussed in Finding 4, government budgeting for book provision is inadequate, with budgets typically consisting of leftover funds rather than deliberate planning around targeted outcomes. This is particularly true for reading books, however even textbook procurement and curriculum revision cycles are not well-defined and/or adhered to in most countries. Donor-funded projects can exacerbate the problem, as they typically consist of one-time surges in demand rather than long-term, sustainable, and predictable funding streams.

The resulting inefficiencies are felt across the book value chain. Publishers lack demand forecasts to properly plan book development—a process which can take up to 18 months.¹⁶¹ Local printers cannot invest in more cost-effective technologies without an understanding of future volumes,¹⁶² and critically, schools cannot effectively plan or teach curriculum without knowing what books they will have and when they will arrive. In sum, a lack of consistent and predictable demand not only creates inefficiencies but also threatens the quality of instruction and the viability of local publishing and printing industries.

To illustrate: in Kenya, Rwanda, Ethiopia, and Uganda, there is evidence to indicate that local publishers are capable and willing to publish local language primary textbooks and readers so long as a viable market exists.¹⁶³

A separate but related issue is that of small print run sizes. With average print run sizes of reading books estimated at 500 – 5,000 copies,^{164,165} increasing the volume of print runs was consistently cited as the top cost reduction opportunity for reading books in secondary research¹⁶⁶ and stakeholder interviews, which is corroborated by book price data.^{167,168} In the Philippines, when the government orders in bulk, publishers are able to break the cost limitations of the first printing of 1,000 copies, offer better list prices and greater discounts to book jobbers and bookstores, and minimize stocking of unsold or slow-moving inventories.¹⁶⁹ In Bangladesh, it was widely agreed in research interviews that a significant extension of print runs via guaranteed bulk sales and fast payments could have the impact of reducing prices by more than 50%.¹⁷⁰ As shown in Figure 9, the price per book for large print runs of ~50,000 copies is roughly half of that for small print runs of 5,000 copies (assuming offset printing technology). This is particularly relevant for reading books vs. textbooks, given that reading books are currently not procured in bulk by governments and thus have small print run sizes.

While volume-based price reductions for reading books may naturally result from increases in funding and procurement, it is important to note that large print runs are not always feasible, depending on the country and language. Data from R4D country case studies, shown in Figure 10, shows that across 36 country-language combinations, 23 of them (64%)

¹⁶¹ RTI International and Varlyproject. (2015). *Research on Reading in Morocco: Analysis of Textbook Procurement Chain and Market for Supplementary Reading Materials*. Prepared for USAID.

¹⁶² de Jongh, Maggie and de Haas, Roel. (2015). blueTree Group. Interview conducted by R4D. 7 October 2015.

¹⁶³ Kenya Case Study—see Annex 3.

¹⁶⁴ Niger Case Study—see Annex 3.

¹⁶⁵ Waweru, David. (2015). Kenya Publishers Association and WordAlive Publishers. Interview conducted by R4D. 20 November 2015.

¹⁶⁶ Crabbe, R. A. B., Nyingi, M., and Abadzi, H. (2014).

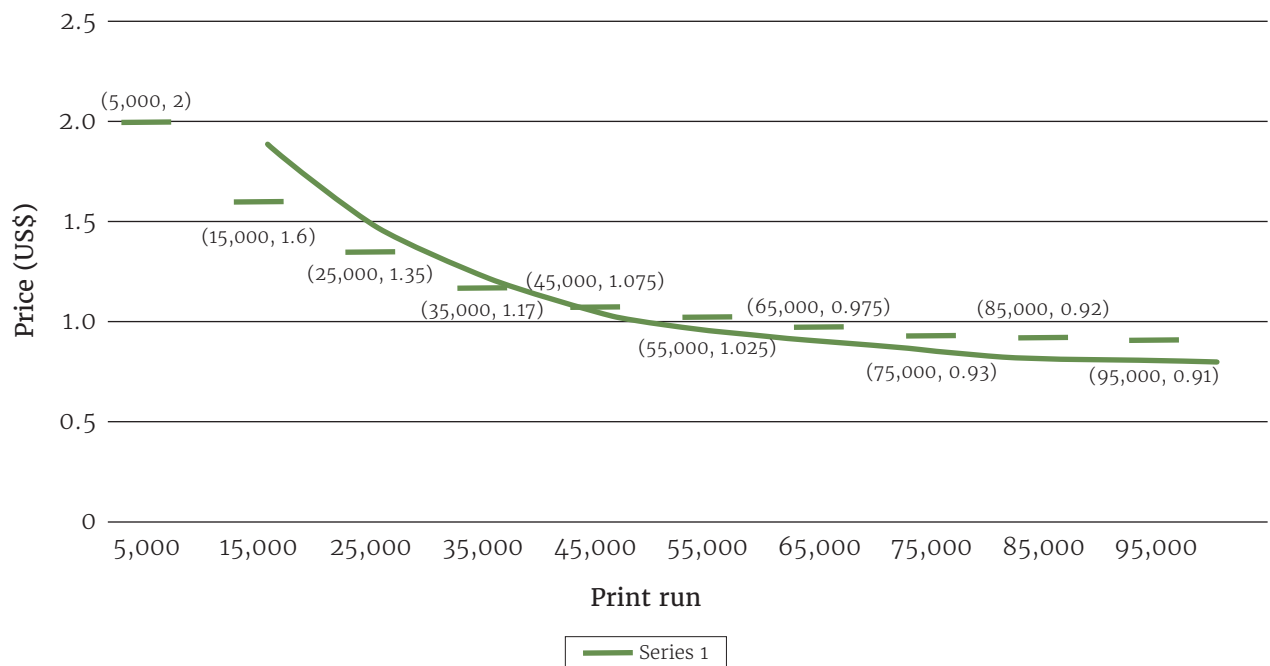
¹⁶⁷ Book price and cost data provided by David Waweru of WordAlive Publishers and Kenya Publishers Association.

¹⁶⁸ Fredriksen, B., Brar, S., and Trucano, M. (2015).

¹⁶⁹ Philippines Case Study—see Annex 3.

¹⁷⁰ Bangladesh Case Study—see Annex 3.

Figure 9. Book costs vs. print run sizes¹⁷¹



are estimated to have sufficiently large primary grade populations to support a print run of 50,000 or more copies. As reading book print runs in Africa are currently estimated at 500–5,000 copies,^{172,173} there appears to be significant savings potential across a majority of languages and countries from increasing print run sizes. This could be achieved through a combination of increased funding, nationally standardized book lists, and efficient centralized national procurement.

For textbooks, potential savings may be smaller depending on the country. Some countries (e.g., Vietnam and Uganda) already procure large volumes of textbooks centrally and, as shown in Figure 9, per-book savings are more marginal above 50,000 copies. However, in many Anglophone SSA countries, there has been a shift in recent years toward decentralized textbook supply systems based on government-approved textbook lists and school-based choices.

While this decentralized approach can have the effect of fragmenting orders and reducing print run sizes, this need not be the case, as it is very easy to combine centralized procurement with decentralized selection. This has been demonstrated in Rwanda, where school orders are consolidated centrally and publishers are provided with consolidated print run requirements and detailed school-by-school distribution lists. A UNESCO report estimated a potential US\$1 billion in savings from centralizing national procurement across these countries.¹⁷⁴

A final set of inefficiencies in book purchasing stems from government tender practices and requirements. These issues, which affect both the cost and quality of books, fall into three areas:

- **Selection of vendors that are not of the highest quality and/or most cost effective** results from corruption, lack of transparency, and lack of

¹⁷¹ Read, T. (2015). Data is based on offset printing quotes from multiple printers in India, Mauritius, and Malaysia.

¹⁷² Niger Case Study—see Annex 3.

¹⁷³ Waweru, David. (2015).

¹⁷⁴ UNESCO. (2016a).

Figure 10. Estimated potential print run sizes for primary grades 1–3 based on existing enrollment data

Estimates based on the assumption that each school will receive 5 copies of each reader in the language of its specified LOI.¹⁷⁵

Country	Languages	Est print run size (theoretical)	Comments
Bangladesh	Bengali	1 million+	
	Chakma	5,000	
	Marma	2,500	
	Garo	2,500	
	Tripura	2,500	
	Shantali	2,500	
India	Bengali	500,000+	
	English	500,000+	
Kenya	English	750,000	
	Kiswahili	750,000	
	Kikuyu	75,000	
	Kikamba	50,000	Print runs for these languages are estimates
	Dholuo	50,000	
Nigeria	English	1 million+	
	Hausa	1 million+	
Pakistan	Urdu	500,000	
	English	500,000	Print runs based on Sindh school enrollments only
	Sindhi	500,000	
Rwanda	Kinyarwanda	600,000	
	English	600,000	
South Sudan	Dinka	100,000	No decisions yet taken on which local languages should be LOIs, Information on local language enrollments is provisional only
	Nuer	100,000	
	Bari	70,000	
	Zande	30,000	
	English	300,000	
Tanzania	Kiswahili	800,000	
	English	800,000	
Uganda	Luganda	50,000	
	Lusoga		
	Leb-Acholi		
	Leb-Lango, Nga'karamajong		
	Runyoro/Rutoro	20,000 combined	Print runs are estimates
	Runyankore/Rukiga Lumasaba	for the	
	Lugbarati	other languages	
	Lugwere		
	Lukhonzu		
	Ateso		
	English	100,000+	
Totals for languages spanning multiple countries	Bengali	1.5 million+	
	English	4.5 million+	
	Hausa	1 million+	
	Kiswahili	1.5 million+	

■ = 50,000 or more copies

¹⁷⁵ Country Case Studies—see Annex 3.

quality audits in tender processes. Corruption was widely cited in research and stakeholder interviews to be an issue across countries,^{176,177} though even where it was not suspected, publishers noted that tenders are often not widely disseminated and selection criteria not transparent. Furthermore, selection processes are typically conducted without “integrity, due diligence,” or audits on suppliers to ensure that they are reputable firms with recommendable backgrounds. At minimum, asking suppliers to provide a recent order history and also conducting reference checks would help mitigate these issues; though ideally this would be complemented with quality control and supplier performance tracking processes as well.

- **Use of local printers, in contrast to international printers,** is generally more expensive in SSA except when print runs are very small. This is true for local printers in Africa and selected other countries, but not in countries such as India which have cost-competitive local printers and often serve as hubs for regional printing. It is important to note that while local *publishing* industries are important for producing culturally-relevant content (Finding 6), local *printing* does not have any positive impact on educational outcomes versus international printing. Furthermore, the cost savings possible from using international printers must be weighed against the positive effects that local printing companies have on the local economy.

Though price comparison data is sparse, anecdotal evidence from stakeholder interviews indicates

that prices from local African printers are between 10% and 150% higher than international printers; the cost difference is highly context dependent and influenced by factors such as print run volumes, timeline, number of pages, location, etc.^{178,179,180} This price differential is primarily driven by two factors. First, smaller local printers cannot invest in more cost-effective, newer printing machines. Second, local printers in SSA pay approximately 15–20% more for paper due to lower purchase volumes and import taxes on paper,¹⁸¹ versus books printed overseas which are imported tax-free.¹⁸²

That said, R4D country case studies indicate that a majority of both textbooks and reading books in sub-Saharan Africa are already being printed internationally—given lower costs, better quality, and greater reliability. Even in countries with well-developed printing industries like Kenya and Nigeria, publishers prefer to buy a majority of their books from international printers. This finding is based on country stakeholder interviews, however has not been corroborated by data and was contradicted by one expert in Kenya.¹⁸³

- **Book specifications** may not be optimized for quality and cost-effectiveness. This includes visual and linguistic standards that affect learning outcomes (e.g., word density, font size, use of color—see Box 5),¹⁸⁴ printing specifications which affect book durability and cost (e.g., cover material, binding, paper quality); and design/layout specifications which affect paper wastage and therefore costs (e.g., number of pages,

¹⁷⁶ Barth, Christophe. (2015). Burda Druck. Interview conducted by R4D. 1 October 2015 and 15 November 2015.

¹⁷⁷ de Jongh, Maggie and de Haas, Roel. (2015).

¹⁷⁸ Piper, Ben. (2015). RTI Kenya. Interview conducted by R4D. 4 December 2015.

¹⁷⁹ Waweru, David. (2015).

¹⁸⁰ de Jongh, Maggie and de Haas, Roel. (2015).

¹⁸¹ USAID. (2014). *Best Practices for Developing Supplementary Reading Materials*. USAID.

¹⁸² Exceptions to this exist and include Vietnam, where the government buys paper in large quantities on the international market then provides it to various local printers (Fredriksen, B., Brar, S., and Trucano, M. [2015].). There are also countries (e.g. South Africa) that have eliminated import taxes on paper used to print educational materials.

¹⁸³ David Waweru of WordAlive Publishers and Kenya Publishers Association estimated that 75% of primary grade SRMs are printed locally.

¹⁸⁴ Marinelli, C.V., et al. (2013). *Visual and linguistic factors in literacy acquisition: Instructional Implications For Beginning Readers in Low-Income Countries*. Prepared for the World Bank by the Global Partnership for Education.

Box 5. Textbook format and visual effects on learning to read in young children

What does evidence from vision science tell us about textbook format?

First and second grade textbooks should be printed taking into consideration that the child's visual system is still developing. We have learned that the text size should measure 24 pt., double-spaced lines with three letter spaces between words. Furthermore, Courier is the most effective font type for Latin script.

First grade textbooks should start with single letters, proceed to bigrams, and then to words of increasing length. Results from visual psychophysics indicate that, contrary to the whole word approach, starting from letters can substantially help word decoding.

Evidence indicates that several pictures on a page may actually prove detrimental and impair reading. By contrast, one informative picture, positioned in a consistent position in the page layout, may improve comprehension and information retention.

Colors can impact the learning process if applied functionally and effectively. Consistent use of particular colored texts can help children to quickly memorize a pattern of words and sounds, and use of colored overlays and paper may increase the readability of textbooks.

Excerpts from GPE literature review on “Visual and linguistic factors in literacy acquisition”¹⁸⁵

paper size). While there is limited data to assess current book specifications, R4D-IEP country case studies indicate that most countries opt for durable production specifications to achieve a 3–5 year book life. However, some specifications may not be optimized. There is also not universal agreement amongst experts as to which printing specifications are optimal.

Importantly, inefficiencies in book specifications appear to have minimal impact on overall book prices. A majority of stakeholders consulted did not believe significant savings were possible from optimizing print specifications, a conclusion which is supported by book cost data. As shown in Figure 11, printing comprises ~30% of a book's final price for publishing and printing tenders and ~90% for printing-only tenders, with only half of that cost coming from manufacturing and raw materials. Thus, even a 15% savings in manufacturing costs—which most stakeholders would consider high—would yield only a 2–7% savings on the final book price.

Book specifications are important to consider, however, for quality and durability reasons. To illustrate, book destruction due to poor construction was believed to be the greatest driver of Tanzania's 50%+ book loss rate.¹⁸⁶ Durability is most affected by binding, cover materials, and paper type. As shown in Figure 12, using higher quality specifications for each dimension—leading to a four-year book life—is associated with only ~20–40% higher costs than using lower quality specifications for a one-year book life. This clearly illustrates that durable specifications are more cost effective; paying 20–40% more for a book to last three additional years is much less expensive than paying 300% more to replace the entire book each of those years. This conclusion is corroborated by data from a recent World Bank report which showed that increasing durability from 1 to 3 years

¹⁸⁵ Ibid.

¹⁸⁶ Graham, L., and Pehrsson, K. (2004).

Figure 11. Breakdown of textbook and reading book prices in sub-Saharan Africa¹⁸⁷

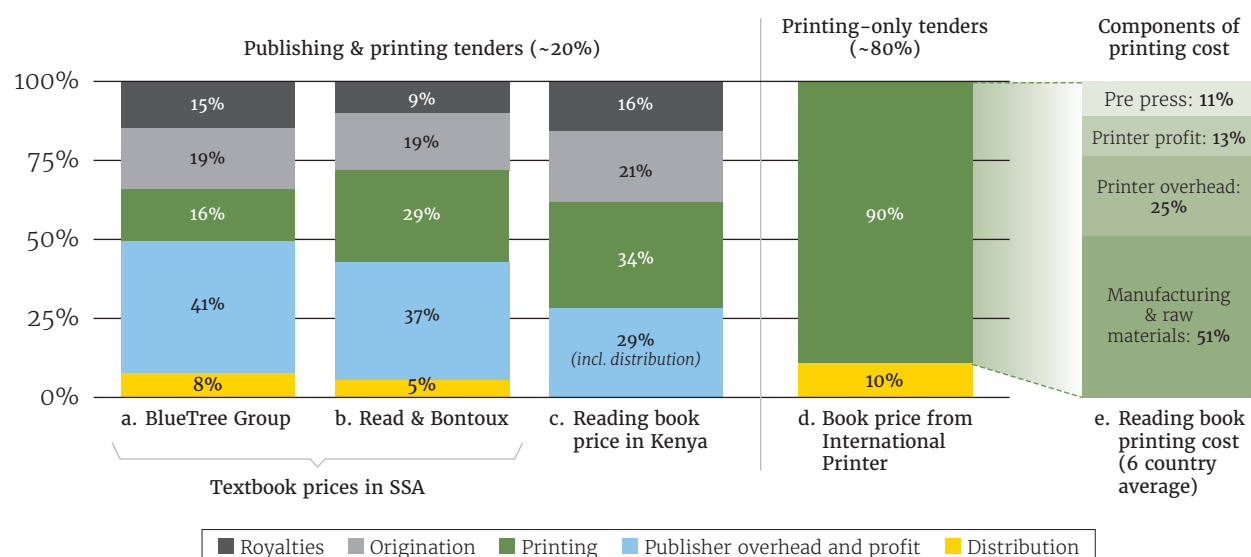


Figure 12. Comparative prices for one- and four-year textbook specifications¹⁸⁸

Item	Title	Size	Cover pages	Text pages	Cover colors	Text colors	Text paper	Cover card	Binding style	Print run	US\$ price FOB
1	Primary TB	7.44 × 9.68"	4	96	4	4	62 gsm	180 gsm	Saddle Stitch	75,000	0.464
2	Primary TB	7.44 × 9.68"	4	96	4	4	80 gsm	250 gsm	Saddle Stitch	75,000	0.553
3	Primary TB	7.44 × 9.68"	4	96	1	1	62 gsm	180 gsm	Saddle Stitch	75,000	0.381
4	Primary TB	7.44 × 9.68"	4	96	1	1	80 gsm	250 gsm	Saddle Stitch	75,000	0.540
5	Secondary TB	7.44 × 9.68"	4	144	4	4	62 gsm	180 gsm	Perfect Bound	20,000	0.788
6	Secondary TB	7.44 × 9.68"	4	144	4	4	80 gsm	250 gsm	Section sewn	20,000	0.969
7	Secondary TB	7.44 × 9.68"	4	144	1	2	62 gsm	180 gsm	Perfect Bound	20,000	0.624
8	Secondary TB	7.44 × 9.68"	4	144	1	2	80 gsm	250 gsm	Section sewn	20,000	0.780

Note: FOB=freight on board; gsm=grams per square meter; TB=textbook

¹⁸⁷ a. blueTree Group. (2012). *Community of Practice Workshop: Getting the right books to the kids. Book Costs Across the Book Chain*.

b. Fredriksen, B., Brar, S., and Trucano, M. (2015). Averages data from Read and Bontoux (2015) and World Bank 2002 survey of 21 publishers in 12 SSA countries.

c. Publisher cost breakdown from David Waweru of WordAlive Publishers and Kenya Publishers Association. Publisher overhead includes financing and distribution costs.

d. Average costs across 14 printers in 6 countries (Bangladesh, India, Niger, Nigeria, Philippines, Tanzania) from Country Case Studies—see Annex 3.

¹⁸⁸ Read, T. (2015).

can reduce the annual per-pupil cost of textbooks by approximately two-thirds.¹⁸⁹

- **Other issues:** Additional issues mentioned by a few stakeholders concerned government payment practices. One interviewee noted an issue with late payments,¹⁹⁰ while another emphasized the uncertainty of being paid at all, both of which were assumed to increase risk and therefore costs.

Given these issues, a GBF could play a role in (a) disseminating and/or directly incentivizing procurement best practices, (b) improving the consistency and predictability of demand, and/or (c) promoting centralized pooled procurement at the national (and potentially regional) level to lower book costs.

- a) **Disseminate and/or directly incentivize procurement best practices.** A GBF entity (or another entity in the absence of a GBF) could play a role in creating normative standards for book procurement. This could include guidance around book specifications as well as standards for transparency, integrity due diligence, quality control, policy (e.g., approved national book lists, import duties on paper), and combatting corruption. A GBF could also go a step further and require adherence to some of these standards as a condition for funding eligibility, thereby directly incentivizing their use if they can use additional funding as leverage.
- b) **Improving the consistency and predictability of demand** for books will require both increasing awareness of the importance of reading books and incentives for governments to prioritize book budgeting and planning. For the latter, a GBF could create such incentives by providing multi-year funding for books, with the requirement that governments provide matching funds and adopt certain management and operational best practices. These could be designed to address other procurement inefficiencies

including combatting corruption, improving the transparency of tenders, developing evaluation criteria for books, and adhering to other procurement best practices.

To supplement this, the GBF could also fund technical assistance to countries to implement effective budgeting, planning, and book management practices. Given that many countries are not doing these activities at even a basic level, capacity building will likely be crucial to achieving broader literacy goals within public education systems. This type of capacity building was done in Tanzania as part of the aforementioned PPP, with positive effects at the central level (though mixed results were experienced at the district level).¹⁹¹ Importantly, we recommend that technical assistance be funded but not provided directly through the GBF, to avoid conflicts of interest and organizational bloat.

- c) **Promote centralized pooled procurement at the national level to lower book costs.** We use the term “centralized pooled procurement” to refer to the practice of bulk ordering books at the national level for a country’s entire public education system. This allows for the largest possible print run sizes per title, thereby lowering per-book costs. It is important to note that pooled procurement aims to achieve cost-effectiveness. To ensure high-quality materials, separate, complementary mechanisms must be in place for book and vendor selection and quality assurance. While centralized pooled procurement is already standard practice for textbooks in most countries, it has not been implemented for reading books given a dearth of funding and, consequently, lack of national coordination around reading book selection and procurement.

Importantly, our recommendation to promote pooled procurement need not conflict with the trend towards decentralized book selection and

¹⁸⁹ Fredriksen, B., Brar, S., and Trucano, M. (2015).

¹⁹⁰ de Jongh, Maggie and de Haas, Roel. (2015).

¹⁹¹ Grahm, L., and Pehrsson, K. (2004).

purchasing at the school level. Such a system, with school-based selection and ordering within the limits of a per capita purchasing budget, has been shown to better reflect individual school needs and not waste financial resources.¹⁹² Using a pre-approved list of titles that meet national curricular standards, a procurement system can be implemented that preserves school-level choice but aggregates individual school's orders centrally to reap the benefits of pooled purchasing. Thus, this recommendation can be implemented regardless of a country's policies relating to book selection and book quality.

The GBF could fund technical assistance to countries to help them build the capacity to manage national centralized procurement, even while maintaining local autonomy over book choice where this is relevant. In combination with national policies to standardize curriculum (e.g., single textbook policies,¹⁹³ approved lists of reading books), this would have a significant impact on print run sizes and costs for reading books as well as for textbooks in the many countries with decentralized supply systems.

The GBF might also consider funding organizations to undertake *regional level* pooled procurement and/or content development across countries with common languages; however, the economic case for this is less clear. This would only be applicable for a handful of languages (from our country case studies these would include Bengali, English, Hausa, and Kiswahili as seen in Figure 10) and, from a cost savings standpoint, would only be relevant if funding for reading books remains limited such that pooling could, for example, make the difference between a 5,000 and 25,000 print run size (corresponding to 33% savings on book prices, as seen in Figure 9). However, if reading book funding increases significantly such that full-potential print run sizes can be realized in each country, pooling

volumes across countries would provide limited benefit given that cost savings are marginal above the 50,000 volume level.

In general, multi-country pooled procurement should be undertaken with extreme caution and only after careful analysis and intervention design. Examples from the health sector (e.g., Global Fund Voluntary Pooled Procurement, CHAI-UNITAID ARV Programs) teach us that pooled procurement involves significant operational challenges, such as the coordination between countries of product selection, demand forecasting, and order & delivery timing. Management costs and complexity around such activities need to be weighed against potential benefits which may be minimal depending on non-pooled volumes. Furthermore, pooling procurement can negatively impact private industry if it is operationalized without considering local market dynamics (for example, if books are sold directly to schools in areas where booksellers are typically involved, or if procurement is done primarily through a single printer and/or publisher leading to a monopoly market). A more careful examination is needed to analyze the pros and cons of different options, ranging from centralized pooled procurement to country- or publisher-led initiatives to share titles and coordinate order timing.

Another potential solution that was examined was pooling procurement of paper for African countries that use domestic printers. While there is potential for such an approach to lower costs in relevant countries, this was deemed low priority given that (1) most books procured in surveyed countries are already being printed internationally, which limits potential savings, and (2) there would be significant complexities involved given that different paper types and sizes may be preferred or needed for certain types of printing machines. This type of solution

¹⁹² Read, T. (2015)

¹⁹³ Fredriksen, B., Brar, S., and Trucano, M. (2015).

may be more appropriate within a single country that uses domestic printers, as has been seen in Vietnam, and could potentially be an intervention for which the GBF funds technical assistance at a country level.

Finding 8: *The cost to implement a digital reading program based on a library model is about 12–13 times more expensive than the cost to implement a similar print reading program. However, for structured reading programs where each child is reading the same book at the same time, digital programs are less expensive per child than print programs.*

In order to compare the cost of implementing digital versus print reading programs, a theoretical model was developed to calculate the annual cost per student for both digital and print reading programs.¹⁹⁴ Per student costs were calculated based on two program models. The first is a library sharing model where students access reading books during an unstructured library period and are encouraged to read at least 42 titles every year. The second is through a structured reading model where groups of students read the same title simultaneously.

In the print scenario of the library sharing model, a classroom library is assumed to have 50 books, each with a unique title (50 titles total), per classroom per year. This allows each child to read their own book simultaneously and access at least 42 titles per year. As a result, the school will only need to purchase 50 unique books per class. In the digital scenario, each child will also be able to access their own e-reader (50 e-readers) during the same unstructured library period. The benefit of an e-reader is that a single device can contain 252 titles (at least 42 titles per grade for 6 grades in a school) which can be shared for up to 300 students in a school (6 classrooms with 50 children per classroom). The 50 e-readers can be

Reading Program 1: Unstructured library model

Students participate in unstructured reading periods in a classroom library of 50 titles. Students have access to books during “library period” and are encouraged to read at least 42 titles every year.

Print scenario: 50 unique titles per grade per year, to allow every child in each classroom (50 children per class) to read their own book simultaneously. Classrooms will have a total of 50 books.

Digital scenario: 50 e-readers each containing 252 titles (42 titles per grade, for 6 grades) for up to 300 students in a school (each school has 6 classrooms with 50 children per classroom). 50 e-readers are circulated from class to class during reading period, allowing each child in a classroom to read their own title simultaneously.

circulated from class to class during unstructured reading periods.¹⁹⁵ These scenarios were based on conversations with stakeholders such as Bridge International Academies and Worldreader regarding how programs are currently being implemented. Books being shared across classrooms was a common scenario described by implementers. While this model aims to be as comprehensive as possible, several costs have not been accounted for, including waste (e.g., disposing of e-waste), inefficient use (e.g., over-ordering print materials and disposing of extra copies), and peripheral devices (e.g., memory sticks for digital programs).¹⁹⁶ Further details on the methodology used to calculate these costs can be found in Appendices 3 and 4 of this report.

¹⁹⁴ Our analysis is specific to digital reading books.

¹⁹⁵ Methodology and assumptions for the print and digital financial feasibility models can be found in Appendices 2 and 3, respectively.

¹⁹⁶ In an effort to draw the most meaningfully similar comparison as possible, this analysis focuses on cost variables that differ between print and digital materials; thus while the costs of printing materials and licensing digital materials are included, the cost of authorship is omitted as it would be similar between print and digital reading materials.

Based on the described unstructured library model, the provision of digital reading materials, estimated at US\$25.01 per student, is approximately 13 times more expensive than that of printed materials, estimated at US\$1.90 annually per student.¹⁹⁷ Even if first time device costs are omitted from the calculations (assuming that devices are donated or students and/or schools already have a digital device), the cost per student under a digital reading program, at US\$22.34, is still more expensive than the cost per student in a print scenario.

While the unstructured library model suggests that digital reading programs are significantly more expensive than print programs, a structured reading model yields different results (Figure 13). For example, in such a model, children are assumed to read the same title simultaneously. This requires multiple copies of the same book. Even if a book is shared among 4 children, the cost of purchasing multiple book copies of the same title can quickly rise for structured reading periods if each child is encouraged to read at least 42 titles a year. We find that in such a structured

Reading Program 2: Structured reading model

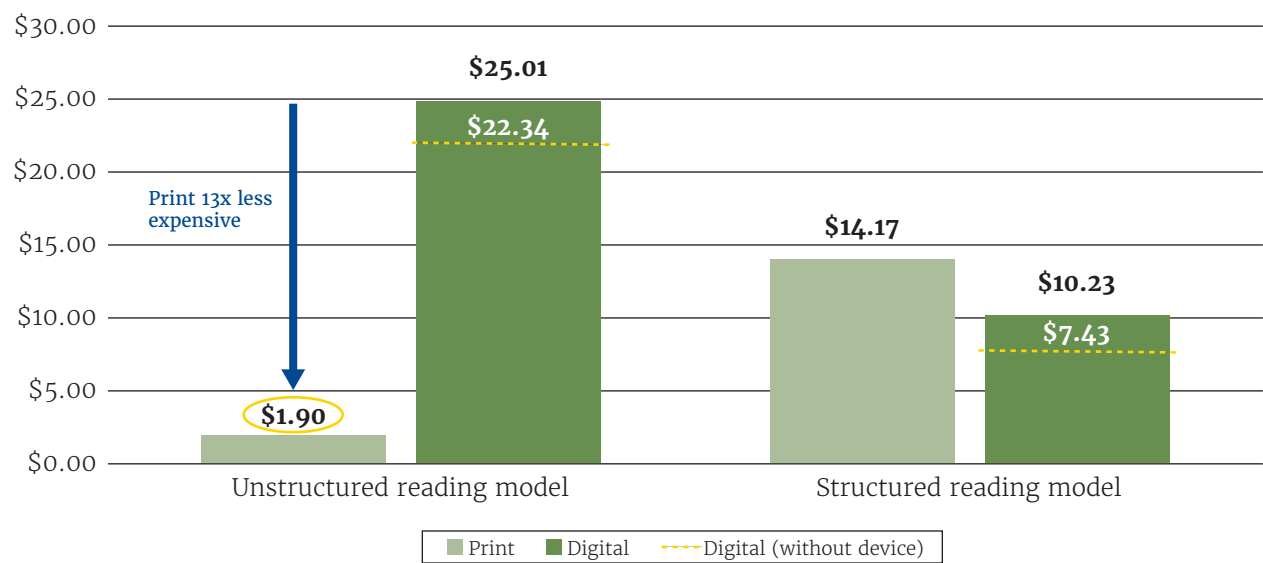
Students participate in structured reading activities, all reading the same title simultaneously. Groups of 4 students share a book. Students read 50 different titles every year.

Print scenario: 1 copy of each title is shared among 4 children per year.

Digital scenario: 1 e-reader containing 50 titles shared among 4 children per year.

reading model, digital programs are less expensive per student than print programs. The provision of digital reading material, estimated at US\$10.23, is slightly lower than the provision of print, estimated at US\$14.17. If schools already own devices, the cost per student falls to US\$7.43 for digital programs.

Figure 13. Comparative annual per student cost of providing print and digital materials, varied by student reading model



¹⁹⁷ Comparison to print materials only included reading books and did not analyze the cost of textbooks.

Our findings suggest that the decision to implement either digital- or print-based reading programs will be dependent on the choice of reading program. However, our analysis indicates that print reading programs under an unstructured library model is the least expensive option given resource constraints.

It is also critical to compare the learning outcomes resulting from print and digital reading materials to achieve a robust cost-effectiveness analysis. Existing research indicates that print materials may be more efficacious than digital ones; however, more studies for the target population are needed to draw compelling conclusions. For example, there may be specific populations for whom digital materials may be more beneficial than print, such as students with print disabilities¹⁹⁸ including severe visual impairments or dyslexia. While a cost-effectiveness analysis of this type of program was not in the scope of this report, there are a number of organizations, including Benetech¹⁹⁹ and UNICEF,²⁰⁰ working to improve access to digitally accessible texts²⁰¹ for students with print disabilities. The Accessible Books Consortium (ABC), a multi-stakeholder partnership, is also working to increase the number of books in accessible formats.²⁰² Additionally, stakeholder interviews suggest UNICEF will be commissioning a more extensive feasibility study on the expansion of digitally accessible texts for this population.

Digital devices may also be practical for providing access to reading materials for refugee populations, as these devices could allow for the use of both standard e-reading files and digitally accessible materials²⁰³ within camp environments where children of all ability levels may be learning together. Phase 2 may provide an opportunity to further explore specific

populations and circumstances where digital reading materials may be more suitable than print materials.

Finding 9: *There are high technical barriers to the adoption of digital reading materials including a lack of sufficient infrastructure to support device use and high intellectual property-related (IP-related) transaction costs.*

There are various digital reading devices being used in low and middle income countries. For the purposes of our analysis, four digital reading devices are identified as being most relevant for children in pre-primary and primary schools: desktops, laptops, tablets, and e-readers. These devices also come with a range of operating models. Tablets, for example, can be multi-purpose and can be used for other classroom learning activities in addition to reading. These devices all have varying technical specifications, such as requirements for access to electricity and how digital reading files can be utilized. These differences have implications for how materials are used and what type of infrastructure is needed to support this use.

Two infrastructure features critical for consistent use of digital reading devices are found to be limiting in low-resource settings: access to electricity to charge devices and internet connectivity to download content in schools. Mobile devices such as laptops, tablets, and e-readers require between one and four hours of electricity to fully charge, while a desktop needs a constant power source.^{204,205,206} Additionally, while devices are sometimes pre-loaded with content or have the capacity to load content via flash drives or other physical drives, internet connectivity is required to support content distribution for most tablets and e-readers. Unfortunately, in low and middle income countries, including those in sub-Saharan Africa

¹⁹⁸ Defined as those with visual impairments, physical disabilities, and/or learning disabilities that prevent them from reading a printed book

¹⁹⁹ Benetech. (2016). Bookshare. Retrieved from: <http://benetech.org/our-programs/literacy/bookshare/>.

²⁰⁰ UNICEF. (2016). *All Children learning and reading together: Using universal design for creating effective learning materials for all children*.

²⁰¹ Defined by Bookshare as texts accessible to those with print disabilities. These include texts for traditional assistive devices, as well as spoken texts for use on tablets, smart phones, and MP3 devices.

²⁰² Accessible Books Consortium. (2016). *What does the Accessible Books Consortium Do?*

²⁰³ Jenna, Terry and Seaman, Robin. (2015). Benetech. Interview conducted by R4D.

²⁰⁴ Zacarias, Dani., Tam, Tina., and Lowe, Zev. (2015).

²⁰⁵ Novak, Matej. (2015). Beyond Access. Interview conducted by R4D. 30 September 2015.

²⁰⁶ Atuti, Richard. (2015). Kenya National Libraries Association. Interview conducted by R4D. 21 October 2015.

(SSA), only 25% of primary schools typically have access to electricity²⁰⁷ and even fewer—15%—have access to the internet.²⁰⁸ Significant large-scale infrastructure improvements to ensure consistent access to power and the internet in pre-primary and primary schools are needed before education systems can begin scaling digital reading programs.

In addition to challenges with internet connectivity, content distribution in low-resource settings is complicated by the high IP-related transaction costs associated with downloading reading materials. Many reading books are copyrighted by a publishing house and a contract is required to establish the terms of access before these titles can be downloaded onto new devices. Purchasers, like Worldreader or eKitabu, often have to negotiate country-specific intellectual property (IP) rights with the publisher for each digital title to be used in a different country since there are few cross-border or regional agreements to distribute digital material. Contracts for distribution are also often either time- or device- dependent and thus have to be renegotiated for each new order. For example, local digital publishing houses such as the Kenya-based eKitabu often have to re-negotiate content access for each set of titles distributed, imposing high transaction costs for the distributor.²⁰⁹

While there are existing options to lower these transaction costs, they are often only tenable for large, international publishers. While Creative Commons²¹⁰ (CC) licenses enables a title to be freely distributed without repeated contract negotiations (and reportedly can benefit sales of the same title in print), this license also impedes publishers from making a profit from each book download. While large publishers with a significant roster of available titles can choose to make some of their content open access without risking a significant decrease

in profits, smaller publishers may not have enough titles to risk the associated lost revenue. For example, Pratham Books, based in India, has open sourced over 50% of their available titles; however, about 1,500 of their books remain under copyright and are in the process of being openly licensed. The organization is a mission-focused, nonprofit publisher and will trade off a potential income loss in the larger interest of providing greater access to books. However, it has conversely benefited with print book sales reportedly increasing two-fold after an open-source version of the book becomes available online.²¹¹

Finding 10: *Operational challenges also constrain the uptake of digital materials and include challenges related to education policy, content availability, and utilization.*

Education policy

One aspect of operational barriers is related to education policy, specifically whether education policies are updated to reflect the use of digital platforms for reading programs and if these policies are costed. Unfortunately, while approximately 50% of countries have Information and Communications Technology for Education (ICT4E) policies, they often fail to include specific references to digital reading components; very few ICT4E policies mention reading outcomes as a specific objective, while “literacy” is often discussed in terms of computer and technology literacy, not reading literacy.²¹² Further, it is not uncommon for ministries of education to consider printed and digital materials separately—with different units responsible for related planning, procurement and training, drawing on different budgets.²¹³ In some cases, responsibility for digital materials may even sit outside the ministry of education and with a specialized agency having dedicated ICT focus, or sometimes with a unit within

²⁰⁷ UNESCO. (2015c).

²⁰⁸ UNESCO. (2014b). WSIS Tables.

²⁰⁹ Utterback, Matthew. (2015). eKitabu. Interview conducted by R4D. 28 October 2015.

²¹⁰ Creative Commons copyright licenses help creators retain copyright while allowing others to copy, distribute, and make use of their work. Creative Commons. (2015).

²¹¹ Shah, Purvi. (2015). Pratham Books. Interview conducted by R4D. 22 November 2015.

²¹² R4D analysis of national ICT4E policies.

²¹³ Trucano, Michael. (2015). World Bank. Interview conducted by R4D. 13 November 2015.

the ICT ministry. This division of print and digital materials hinders digital content from being considered as part of a holistic education policy, and further limits the scalability of digital reading programs.

In order to facilitate the adoption of digital content into pre-primary and primary classrooms, there is a significant need to improve education policy to better account for the use and financing of digital reading materials.

Content availability

For pre-primary and primary grade readers to benefit from digital reading materials, appropriate content needs to be available for use on digital devices. As explored in Section 1.2, this includes both stories for appropriate reading levels and content in local languages, as it is beneficial for children to learn to read first in their native language before learning to read in other languages. Unfortunately, local language content only comprises approximately 25% of digital publisher databases;²¹⁴ stakeholder interviews reveal that the market for local language content is often too small to cover the costs of content generation, thus limiting the number of available titles. Some organizations, like Book Dash in South Africa, have addressed lowering the cost of content generation by using volunteer professionals to create open access African storybooks. Another option is to translate and digitize existing children's books; however, interviews with publishers reveal that digitizing can cost anywhere from US\$20 to US\$300 per title,²¹⁵ and translating titles from English to local languages can cost as much as US\$10 per page.²¹⁶

Utilization

As with print books, considerable teacher training is required to ensure appropriate use of digital reading devices. In addition to training on how to integrate reading books in classroom lessons, teachers need training on how to adequately operate digital devices. On the other hand, students are reportedly more comfortable with digital reading devices and content. Interviews with implementers reveal that students learn how to use new education technology faster than many of their teachers.^{217,218}

Similar to printed books, varying student sharing models of digital reading devices exist; although there are limited studies that inform the most effective and cost-effective models. Research on how best to integrate digital reading materials alongside printed materials into pre-primary and primary school classrooms is lacking. While existing research shows that digital reading materials improve literacy for children more so than an alternative of no reading books, there is a lack of evidence comparing the efficacy of print materials with digital materials. However, digital reading devices can provide teachers with data on student progress, utilization, and other metrics for analysis. Pixatel Systems, for example, uses a novel tablet-based adaptive learning program that uses auto-generated metrics that allow teachers to target students most in need of attention in real time.²¹⁹ Some studies have shown that print materials may be more effective for early readers than digital: Chiong et al found that for children aged 3 to 6, enhanced e-books were less effective than print books in supporting the benefits of co-reading, a technique that helps children improve their vocabularies and overall language development.^{220,221}

²¹⁴ R4D analysis of Worldreader, Storyweaver, eKitabu, and African Storybook Project databases.

²¹⁵ Zacarias, Dani; Tam, Tina; and Lowe, Zev. Interview conducted by R4D. 24 September 2015.

²¹⁶ Abebe, Alemu. (2015). CODE-Ethiopia. Interview conducted by R4D. 12 November 2015.

²¹⁷ Petuchoviaite, Ramune. (2015). Electronic Information Libraries. Interview conducted by R4D. 15 October 2015.

²¹⁸ Brackin, George. (2015). Bridge International Academies. Interview conducted by R4D. 12 November 2015.

²¹⁹ Pixatel Systems. (2015). *Pixatel-Reimagine Education*.

²²⁰ Chiong, C., and Shuler, C. (2010). *Learning: Is there an app for that? Investigations of young children's usage and learning with mobile devices and apps*. New York: The Joan Ganz Cooney Center at Sesame Workshop.

²²¹ Parish-Morris, J., et al. (2013). Once Upon a Time: Parent-Child Dialogue and Storybook Reading in the Electronic Era. *Mind, Brain, and Education*, 7(3).

However, widespread evidence of learning outcomes across pre-primary and primary aged children is inconclusive thus far. For example, there is mixed research on the impact of digital reading devices on reading comprehension.²²² A randomized control trial (RCT) conducted in primary schools in Kenya revealed that pupils with e-readers integrated in the classroom performed better than the control group in reading comprehension. However, a recent Organisation for Economic Co-operation and Development (OECD) evaluation found no evidence of improved reading and mathematics skills amongst primary school children who received laptops and, in fact, showed lower reading skills among students with levels of computer use above the current OECD average.²²³ However, technology may have a role to play in matching teachers to student skill levels. One systematic review found that “pedagogical interventions that match teaching to students’ learning, including through the use of computers or technology” were quite effective.²²⁴ Lastly, the cost-effectiveness of digital devices remains limited at best. The same RCT conducted in Kenyan primary schools concluded that “the intervention was far less cost-effective than the status quo.” It will be important for additional research to be conducted on the utility and effectiveness of digital reading programs in pre-primary and primary school classrooms before taking these programs to scale; a Global Book Fund may be able to finance some of these studies.

2.2.3 Supply chain management of books

Finding 11: *Supply chain issues vary by country, although common challenges include weak demand forecasting, poor management systems, inadequate financing, lack of trained staff, and inefficient distribution.*

Effective reading book provision requires a number of different activities and inputs to operate efficiently at the same time. As has been discussed, the key components of the books supply chain consist of: authorship and publishing, procurement, manufacturing, distribution, storage, and use. Replenishment and reporting systems complete the chain.

One of the final components, distribution, is often the largest source of inefficiency. The basic requirements for an effective books distribution system include the following criteria^{225,226}:

- ▶ Adequate, timely, and predictable financing of books.
- ▶ Reliable information on school locations, student enrollments, and book requirements.
- ▶ A network of regional or local hubs to facilitate transportation of books across the country.
- ▶ Transport vehicles and operational transport systems, such as adequate roads, to allow for access to all areas and timely delivery.
- ▶ Effective and computerized management systems that incorporate accountability mechanisms to track book delivery. Accountability mechanisms could take the form of citizen accountability efforts (Finding 13), payment-based incentives such as payment upon delivery, etc.
- ▶ Storage facilities that are secure, spacious, and sheltered from the elements, humidity, insects, and rodents.
- ▶ Oversight of the distribution process by trained staff or professionals.

However, although the specifics may vary by the administrative structure of the country, challenges occur in distribution of books from the point of production (if overseas) to the national level; the national to the district/regional level; the district to

²²² RTI International. (2015b). *Kenya Primary Math and Reading (PRIMR) Initiative*. RTI International.

²²³ OECD. (2015). *Students, Computers and Learning: Making the Connection*. PISA. Paris: OECD.

²²⁴ Evans, D. and Popova, A. (2015). *What really works to improve learning in developing countries? Analysis of divergent findings in systematic reviews*. Washington DC: World Bank Group Africa Region & Office of the Chief Economist.

²²⁵ Seguin, R. (1989). *The Elaboration of School Textbooks Methodology Guide*. UNESCO Division of Educational Sciences, Contents and Methods of Education.

²²⁶ Read, T. (2015).

the school level; and within the school level, where books are kept locked in cupboards.²²⁷

As already demonstrated in Finding 4, adequate financing is already a severe constraint, particularly for reading books. Our analysis also reveals that the majority of countries studied lack essential national comprehensive EMIS data with which to plan, deliver, and sustain adequate supplies of textbooks and reading books (Finding 2). The importance of demand forecasting and improving the consistency and predictability of demand is explored in Finding 7.

Loss and damage of books is a significant problem, particularly in sub-Saharan Africa. Research indicates a 67% stock attrition in warehousing and transportation in Guinea, 50–60% in Niger, and nearly 50% in Chad. The key reasons behind such alarming losses include an absence of funding for suitable transportation to schools, which leads to books being held at the district level; inadequate storage in districts and schools; theft and corruption; and a lack of overall planning and management, with schools, parents, communities, and civil society unaware of when books are ready for delivery/collection.²²⁸

Similar to due diligence needed more broadly in procurement processes, more robust integrity and due diligence standards could be developed to curtail distribution losses. Reviewing distribution actors' previous performance, conducting reference checks, or following up with recipients on delivery status could help strengthen distribution processes.

Supply chain tracking improvements with the help of technology could also increase efficiencies in distribution. For example, supply chains for health commodities have suffered from similar problems, and stock-outs of essential medicines remain a persistent problem in many countries. But progress has been made in recent years, at least for certain commodities such as vaccines and HIV drugs, with

sustained attention and technical assistance from donors and other partners. Improved systems for tracking commodities through the supply chain have been critical to these improvements, and some of the technologies developed for this purpose could be adapted to track books.²²⁹ For example, the European Medicines Agency is expected to implement a new “track and trace” mechanism and require unique identifier codes to be printed on all medicinal products manufactured in the EU by July 2016, and there have been discussions around a global barcoding program to harmonize the patchwork of different tracking systems and barcodes in place today.²³⁰ It is important to note, however, that the high transaction costs around these mechanisms would have to be balanced against the possibility of adding superficial buffer volumes to book orders.

Indeed, innovations in technology are already being piloted to improve the books supply chain. Specifically, a recent All Children Reading Grand Challenge for Development (ACR GCD) competition, “Track and Trace,” is supporting the prototype piloting of low-cost tracking systems for books and learning materials to improve supply chain management for the book sector. In addition, content generation activities are also being undertaken through the “Enabling Writers Initiative” and the design of Bloom Software developed by SIL International with funding from the ACR GCD. This will help local authors develop high quality early grade reading material in low-resource environments. Lastly, title access is being supported via development of a Global Reading Repository, a digital library which will collect and house reading materials in a range of languages.

It is important to remember however that country contexts influence distribution costs and constraints, and challenges will need to be tackled on a customized basis. For example, South Sudan suffers

²²⁷ Crabbe, R. A. B., Nyingi, M., and Abadzi, H. (2014).

²²⁸ Ibid.

²²⁹ Yadav, Prashant. (2015).

²³⁰ McKinsey and Company. (2012). *Strength in Unity: The promise of global standards in healthcare*.

from severe distribution problems for all TLMs intended for school deliveries. Major problems are insecurity, difficult terrain, lack of roads, and lack of management capacity. In contrast, though not an easily replicable system, Kenya probably has the most comprehensive national network of effective wholesale and retail booksellers in SSA, comprising at least three major wholesalers and up to a thousand retailers. If well monitored, it provides an effective and reliable delivery mechanism to schools and multiple outlets for the sale of textbooks and readers.

Finding 12: *Distribution can be centralized or decentralized, with the public, private, and NGO sectors playing a mix of roles. The effectiveness of the distribution model varies by context and is influenced by accountability measures and the capability of the responsible actor.*

In a centralized distribution system, the MOE plays a central role: it determines school book needs, selects books and places orders to publishers or distributors and booksellers, and delivers books from central warehouses to districts and schools.²³¹ Payment is also made directly by the MOE to the publisher. Although it can work effectively in certain small countries, such systems have been noted to be “bureaucratic, inefficient, and prone to delays, leakage and corruption.”²³²

In contrast, in a decentralized model, book orders and payments come directly from schools or districts to the suppliers, who may be publishers, distributors, and booksellers.²³³ Decentralized systems can use a mix of public and private delivery channels for distribution. Many countries in sub-Saharan Africa have seen a shift toward decentralized supply systems, with school-based selection and ordering, and a growing role for the private sector in distribution.²³⁴

A comparison of centralized and decentralized models can be seen in Figure 14 below.

The effectiveness and efficiency of a distribution model varies by context, and is influenced by accountability measures and the capability and experience of the responsible actor. Our country studies reveal that centralized ordering and state distribution seem to work particularly effectively in South Asia (specifically India, Pakistan, and Bangladesh). Our findings from India show that for government schools in India and West Bengal, free textbooks are distributed by state education ministries, with distribution—via cluster or block resource centers²³⁵—reported to be quite efficient.²³⁶ Possible reasons for this success, including the effective use of awareness campaigns and citizen accountability mechanisms, are explored in Finding 13 below.

Meanwhile, decentralized ordering and private distribution has been shown to be successful in some countries in sub-Saharan Africa. In Rwanda, for example, there is competitive private sector distribution. This distribution has been accountable, efficient, and successful with completed deliveries at no cost to schools on over 98% of orders since 2010. The costs of distribution to schools are included in the bid prices submitted by bidding publishers.²³⁷

Interestingly, decentralized methods can also incorporate a mix of private and public delivery channels. For example, in Ghana, publishers deliver secondary textbooks directly to schools; this private delivery channel is reported to function well. However, primary school textbooks are delivered by publishers to district education offices, which in turn are responsible for delivery to schools. In this case, while the initial privately-managed aspect of the channel functions well, the involvement of the public

²³¹ Crabbe, R. A. B., Nyingi, M., and Abadzi, H. (2014).

²³² Ibid.

²³³ Ibid.

²³⁴ Fredriksen, B., Brar, S., and Trucano, M. (2015).

²³⁵ Fredriksen, B., Brar, S., and Trucano, M. (2015).

²³⁶ India Case Study—see Annex 3.

²³⁷ Rutayisire, J., Buchan, A., and Delaney, H. (2016). *The Reform of Teaching Materials in Rwanda*. UNICEF.

Figure 14. Comparison of centralized and decentralized models²³⁸

	Centralized	Decentralized
Point of delivery	One central point, often far removed from the users/students.	Multiple delivery points: schools or districts, nearer the students/users.
Responsibility for deliveries	Government is sometimes both implementer and supervisor.	Industry/suppliers/contractors deliver. Government is supervisor.
Capacity	Inadequate in many instances.	Depends on industry. Where vibrant industry exists, capacity is usually no problem.
Timeliness of delivery	Poor; no consequence for non-delivery, lateness, or shortfall.	More assured if tied to payment on delivery.
Bureaucracy	High. No in-built incentive to deliver books to students.	Very low; private sector business is profit oriented and speed is essential.
Monitoring/Verification	Weak; shortfall may not be readily reported.	Enhanced if tied to payment of suppliers.
Cost	Masked, because cost of using Government employees, equipment, trucks, etc. usually not factored in.	Seemingly higher than centralized, as handling and transportation costs are factored in.
Payment	Processing can be faster, since delivery is verified at one point.	Processing may be slow due to multiple points of delivery verification.
Leakage	Multiple points, difficult to detect.	Fewer opportunities; easier to trace (publisher, printer, distributor, bookseller). However, delayed payment for past deliveries may encourage leakage.

sector in the onward delivery from district offices to schools has exhibited severe problems, with one survey indicating stock control issues in up to 50% of districts.²³⁹ A similar system is used in Uganda, with publishers effectively delivering books to district offices but distribution stagnating once books are handed off to the public channel for final distribution to schools.²⁴⁰ As a general rule, the weakness in state-controlled book distribution systems is the link between district offices and schools. District offices generally have inadequate storage, untrained staff,

poor or non-existent management and operational systems, insufficient transport, and completely inadequate funding. District to school problems are regularly reported in Ethiopia, South Sudan, Uganda, Malawi, Zambia, Cameroon, Democratic Republic of Congo, Nigeria, and Ghana.²⁴¹ Ultimately, capability and accountability are crucial, and as Read notes: “If there is no accountable distribution system, then decentralized ordering can be negated by a distribution system that fails to provide the materials ordered by the schools.”²⁴²

²³⁸ Crabbe, R. A. B., Nyingi, M., and Abadzi, H. (2014).

²³⁹ Read, T. (2015).

²⁴⁰ Ibid.

²⁴¹ Ibid.

²⁴² Ibid.

Finding 13: *Citizen accountability mechanisms to monitor distribution have been used successfully in some countries—for example, India and the Philippines—and may hold valuable lessons to reduce corruption in sub-Saharan Africa.*

Consultations and research reveal that corruption is a widespread challenge across the value chain, seen all the way from the initial tendering process down to distribution to schools. Effective accountability measures are crucial to minimizing losses due to corruption. Measures may be built into the supply chain—for example, linking payment to delivery, as is the case in Rwanda—or may be a result of citizen-led movements. For example, stakeholder consultations reveal that in India, parents are aware of the timing of the distribution of free textbooks and personally await delivery trucks (Box 6); absent deliveries result in parental pressure on local officials and advocacy efforts through the media. Similarly, in the Philippines, Checkmyschool is a program where communities engage in monitoring the services of the Department of Education (DepEd) such as textbook count, distribution, and usage. Parents or volunteers can report whether textbooks are being used in classrooms through the Checkmyschool website (checkmyschool.org) or through social media. Moreover, between 2000 and 2007, the Department of Education partnered with many civil society organizations, including election poll watchers and the Boy Scouts, whose members volunteered to witness textbook deliveries to schools. This multi-year effort succeeded in reducing textbook losses in transit. It also provided positive feedback that books in the right quantities arrived at their intended destination within an acceptable time period.²⁴³

While examples of citizen accountability mechanisms used specifically to monitor book distribution are limited, such mechanisms have been used to reduce

Box 6

“Schools are informed about the arrival of new session’s textbooks in November, and they in turn inform parents and students accordingly. Distribution of textbooks happens annually on 2 January, which is called ‘Book Day.’ Parents thus know when annual free textbook supplies are due to arrive in schools and expect their children to be issued with the required books on that day.”

Source: India Case Study—see Annex 3.

losses in public funds and goods in other sectors. For example, a citizen-involved school grants monitoring campaign initiated by the Ugandan government in the late 1990s drastically reduced public fund losses from 80% to 20%.²⁴⁴ However, it should be noted that the evidence on these mechanisms is mixed.^{245,246} Success is often context dependent. Some studies have also suggested that factors such as salience of information, involvement of allies that apply top-down pressure, and leveraging a competitive environment are essential building blocks for such initiatives to be successful.²⁴⁷ Thus, citizen accountability mechanisms could be strong tools to counter corruption and losses in distribution, but their applicability should be carefully considered on a country-by-country basis.

Our analysis indicates that citizen-led measures to monitor distribution of books are largely absent in sub-Saharan Africa, potentially due to a combination of a lack of awareness of the importance of books and civil society and community knowledge of book distribution practices. There therefore exists an opportunity for a GBF to foster and strengthen participatory monitoring programs in some sub-Saharan African countries, drawing on lessons from other regions and sectors.

²⁴³ Philippines Case Study—see Annex 3.

²⁴⁴ Reinikka, R., and Svensson, J. (2004). *The Power of Information: Evidence from a Newspaper Campaign to Reduce Capture*. Policy Research Working Papers. Policy Services, Development Research Group.

²⁴⁵ McGee, R., Gaventa, J., et al. (2010). *Synthesis Report: Review of impact and effectiveness of transparency and accountability initiatives*. London: Transparency and Accountability Initiative.

²⁴⁶ Kosack, S. and Fung, A. (2014). Does Transparency Improve Governance? *Annual Review of Political Science*, 17, 65–87.

²⁴⁷ Ibid.

2.2.4 Usage of books

Finding 14: *Although data on reading books is limited, research on textbooks reveals that book provision does not equate with usage.*

Studies and interviews reveal that textbook delivery and provision do not equate with use. A study by the Swedish International Development Agency (SIDA) as part of the Pilot Project for Publishing (PPP) in Tanzania discovered that there were huge discrepancies between the availability of textbooks in schools and their use in the classroom.²⁴⁸ A national survey undertaken in 1999 revealed that although almost 40% of schools surveyed had class sets of textbooks only 4% of schools were actually using them.²⁴⁹ Similar reports on poor textbook usage in the classroom and the reluctance to even issue textbooks to students have been reported in the Democratic Republic of Congo, Ethiopia, Ghana, Guinea, Namibia, Rwanda, Sierra Leone, and Uganda.²⁵⁰ A 2013 World Bank Uganda study also reported that despite the presence of textbooks in public schools, no textbooks were used by students in 86% of the classes.²⁵¹ Private schools—contrary to expectations—actually fared worse than public schools where use was even lower and virtually non-existent at 3%.²⁵²

These findings are very concerning given that the impact of provision of textbooks and reading books on learning outcomes is contingent upon usage. It highlights the important need to ensure that provision is carefully paired with measures to also improve usage.

Finding 15: *Many teachers are unaware of how to appropriately use books in classrooms and how to set up and run school and classroom libraries. Usage can therefore be optimized through ensuring pedagogical quality of books,*

teacher training on how to incorporate books in lessons, establishment of classroom libraries, and advocacy campaigns.

According to our case studies and stakeholder interviews, there are three key barriers to usage: poor book quality, a lack of teacher training, and teacher reluctance to issue textbooks to students. Each is discussed below.

Lack of training

Box 7

“Teachers who know how to use books will facilitate their usage in classrooms and encourage students to use them outside of schools.”

— Alisha Berger, *Room to Read*

Source: Berger, Alisha. (2015). *Room to Read*. Interview conducted by R4D. 18 August 2015.

Almost all our country studies revealed that teachers were uncertain how to use textbooks and reading books effectively in class. Even the most basic classroom techniques in the use of reading books are not widely known, and in our interviews, teachers almost universally requested in-service teacher training in the effective use of learning and teaching materials. In some countries like South Sudan, teachers have been without TLMs for so long that they no longer know how to use them.²⁵³ During our consultations, teachers also requested pre-service teacher training and a simple handbook on the effective use of textbooks and reading books in class from MOEs and donors.

²⁴⁸ Graham, L., and Pehrsson, K. (2004).

²⁴⁹ DFID. (2011). *Guidance Note: A DFID Practice Paper—Learning and Teaching Materials: Policy and Practice for Provision*.

²⁵⁰ Read, T. (2015).

²⁵¹ Wane, W., and Martin, G. (2013). *Education and health services in Uganda: data for results and accountability—November 2013*. Service delivery indicators. Washington DC: World Bank.

²⁵² Ibid.

²⁵³ Read, T. (2015).

Poor book quality

Although teachers remain responsible for effective use of books in classrooms, research suggests that low pedagogical quality and readability of books has led to poor usage. For example, a study in Pakistan revealed that the lack of clarity and inadequacy of information in textbooks caused teachers to forgo using textbooks in classrooms.²⁵⁴ A review of existing reading materials in Hausa revealed that content in textbooks was organized inefficiently, thus hampering appropriate teaching and reading acquisition. The report concluded that most reading materials were not found suitable for early grade Hausa instruction. Most books were poorly designed and incorporated few pedagogical techniques such as blending, decodable words, or connected text.²⁵⁵ Similarly, a study on readability of Arabic early grade reading textbooks found that grade 1 textbooks introduce too many new words and have too few repetitions of words for appropriate word learning.²⁵⁶ There is less data available on the quality and use of reading books because so few reading books exist in schools, but high quality and appropriate language levels and content are equally needed in reading books as they are in textbooks. Even with strong teacher training, books will not be appropriately used if a premium on quality is not ensured.

Teacher reluctance to issue textbooks to students

A majority of lower primary teachers in developing countries are inexperienced, only partially trained, or even not trained at all. Research shows that these teachers fear that providing students with textbooks containing the same subject information they have themselves will undermine their authority. For example, Arabic speaking teachers in South Sudan would not issue English language textbooks to

students in case they were asked questions about English that they could not answer.²⁵⁷ Textbooks are specifically noted here as many classrooms do not have reading books; however, it is likely that this reluctance may also extend to reading books. Indeed, our country studies revealed that teachers' lack of written and reading fluency in some mother tongue and local languages emerged as a challenge preventing proper usage of books.

Given these barriers, four opportunities exist to bolster usage. Programmatic elements of these opportunities could be supported by a GBF and co-financed through government commitments or joint arrangements with bilateral or multilateral donors.

First, quality assurance standards can be used to ensure appropriate usability of books. Minimum quality standards could help stakeholders select or develop books that support or enhance curricula and are of an appropriate language level. For example, early grade books designed for instructional reading should be made up of decodable text and include sentences and vocabulary that are in line with syllabuses of each grade level. Quality standards could also ensure that books are culturally appropriate and gender sensitive.

A GBF could provide leadership in developing and disseminating quality assurance standards for textbooks and reading books that are agreed upon by technical experts and endorsed by countries. Furthermore, a GBF could introduce standardized monitoring tools that could be used at the country level. Although monitoring mechanisms could be adapted per country and incorporate citizen accountability initiatives, the fundamental tools and guidance for monitoring and managing books could be determined by the GBF.

²⁵⁴ Kumari, R., and Mohammad, R. (2007). Effective Use of Textbooks: A Neglected Aspect of Education in Pakistan. *Journal of Education for International Development*, 3(1).

²⁵⁵ RTI International. (2014). *Nigeria Reading and Access Research Activity: Review of Existing Reading Materials to Support Hausa Literacy Instruction*. USAID|Nigeria.

²⁵⁶ USAID. (2010). *Early Grade Reading Textbook Analysis*. USAID|Egypt.

²⁵⁷ Read, T. (2015).

Second, teacher training is needed to ensure usage of books (Box 8). MOEs and some NGOs encourage usage by training teachers how to store, manage, and care for books as well as how to teach reading and encourage student participation. A few also provide brief instruction in mother tongue and local languages when teachers do not fluently speak, read, and/or write in the language to begin with, but this instruction is often not sufficient when it is needed. Interviews suggest that teacher training needs to be continuous, with pre-service and in-service training necessary to increase book usage. It is important to note that these different types of trainings are distinct from each other, and all must be considered in a given context to ensure usage.

Box 8

“[Training related to reading books provision and use] should be part of primary pre-service teacher training as well as the subject of intensive in-service teacher training.”

Source: India Case Study – see Annex 3.

In addition to teacher training, the availability of teaching materials such as teachers’ guides, scripted lessons that directly support teachers’ use of materials, and other TLMs have been shown to improve book usage. According to a study by Levin and Lockheed, teachers’ guides that are well integrated with textbooks or other instructional materials can have a positive impact on student achievement. While teachers’ guides for textbooks are specified in many countries (e.g., Ethiopia, Uganda, Kenya, Tanzania, Rwanda, etc.), they are unfortunately not available in all developing countries.²⁵⁸ While we do not propose that the GBF

itself provide teacher training or teachers’ guides at the country level, the GBF could provide technical support and/or programmatic support to ensure that once delivered, books are adequately leveraged to boost literacy.

Third, classroom, community, and school libraries can also provide an opportunity for children to have dedicated spaces for reading as well as the ability to choose their own book titles. Although evidence on the effectiveness of libraries is sometimes mixed—for instance, an evaluation of Room to Read’s libraries model found positive impact on children’s reading habits in only three of five countries²⁵⁹—there is much research to suggest that libraries have a positive impact if implemented well. According to the Florida Center for Reading Research, “reading centers” can allow students to practice and become more fluent in a reading skill under supervision of the teacher.²⁶⁰ Students who choose what they read and have an informal environment in which to read are more motivated, read more, and show greater language and literacy development.²⁶¹ Reading centers and classroom libraries also allow students to improve reading skills at their own pace and to be exposed to books at different reading levels. Additionally, libraries can serve as an important bridge to reaching children in informal education environments. In countries where traditional library models may not be financially or operationally feasible, innovative models such as the Library Hub Project implemented in the Philippines may hold promise (Box 9). Other innovative examples include mobile libraries in Zimbabwe and Kenya where donkeys or camels were used to transport books from the regional branch libraries to the interior communities.²⁶² Importantly, teacher training in setting up and managing classroom libraries is crucial—without this, libraries cannot be used to effectively support literacy (Box 10).

²⁵⁸ Levin, H., and Lockheed, M. (2012). *Effective Schools in Developing Countries*. Routledge Library Editions: Education.

²⁵⁹ Room to Read. (2014).

²⁶⁰ Florida Center for Reading Research. (2005). *Student center activities: Teacher resource guide*.

²⁶¹ Krashen, S. (1993). *The Power of Reading*. Englewood, Col.: Libraries Unlimited, Inc.

²⁶² Makotsi, R. (2004). *Sharing Resources: how library networks can help reach education goals*. Book Aid International.

Box 9

“In 2005, DepEd launched the Library Hub Project, forging a partnership between [local government units], which provided physical facilities for the local library hub, and DepEd, which provided personnel, training, and materials for the operation of the hub. DepEd procured children’s reading books from local publishers and packaged sets [...] in carry-out hard plastic bins for the library hub. Schools within a hub’s catchment area could borrow a bin full of reading books for use in school for about one month. The school would take out another lot of books after returning the previously borrowed bin. From a pilot of four hubs, the project has expanded to 206 hubs, with brisk traffic in book bins.”

Source: Philippines Case Study—see Annex 3.

Box 10

Our case studies reveal a lack of teacher knowledge in setting up and running school and classroom libraries. In Tanzania, there was a lack of any understanding about how school and classroom libraries could be organized and used to support reading and literacy. Some MOEs are reported to encourage school and classroom library development, but typically no guidelines are provided to schools. Ugandan primary schools were provided with primary school library guidelines 10 years ago, but deteriorating levels of primary reading book stock has inhibited the rapid development of school and classroom libraries as vehicles to encourage use of primary reading books.

Source: Uganda and Tanzania Case Studies—see Annex 3.

Libraries can also encourage children to take books home and read outside of traditional classroom environments. However, for this to be a viable and effective option, schools must pay special attention to book lending policies, loss and damage penalties, and adequate book budgets for replacements as these factors may help or hinder borrowing of books for home use. In Tanzania, although one of the schools interviewed had a small library, it had a “no lending” policy because of limited library stock and fears that borrowed books would not be returned or would be returned damaged.²⁶³ Encouraging reading at home through community or school libraries enables children to interact with books in a non-school environment and increase reading practice hours. According to Crabbe and Nyingi, allowing students to bring books home from libraries provides continuous

exposure which leads to an increased number of practice hours. “Research has shown that ‘having books in the home has a greater impact on children from the least educated families. It is at the bottom, where books are rare, that each additional book matters most’.”^{264,265} In addition, a 2011 OECD PISA report stated that “students who are highly engaged in a wide range of reading activities are more likely than other students to be effective learners and to perform well at school.”²⁶⁶

However, reading centers and school libraries require that schools have necessary book storage systems. Unfortunately, rural classrooms in SSA are often overcrowded—lacking the necessary space for “reading centers” and the secure and weatherproof conditions needed to store books safely. In South Sudan, for example, on average there are 125 pupils

²⁶³ Tanzania Case Study—see Annex 3.

²⁶⁴ Crabbe, R. A. B., Nyingi, M., Abadzi, H. (2014).

²⁶⁵ Evans, M. D. R., Kelley, J., Sikora, J., and Treiman, D. (2010). Family scholarly culture and educational success: Books and schooling in 27 nations. *Research in Social Stratification and Mobility*.

²⁶⁶ OECD. (2011). Do students today read for pleasure? *PISA In Focus*.

in each primary classroom.²⁶⁷ Basic infrastructure may also be lacking. School and classroom libraries in Indian primary schools in rural areas are largely non-existent, except where combined primary and secondary schools provide some kind of school library access for primary students.²⁶⁸

Lastly, NGOs and implementers have encouraged book usage through a variety of advocacy and citizen accountability campaigns such as hosting book days, festivals, and other community events that focus on the merits of reading. The Asia Foundation and Room to Read, for example, have conducted reading campaigns and community events that focus on literacy. A GBF could support advocacy campaigns to highlight the importance of books, especially reading books in local languages that correspond to LOIs.

Finding 16: *Although complementary reading programs can improve reading achievement in students, uncertainties on the cost-effectiveness of these programs persist due to lack of data and agreement on the ideal number of titles needed per student.*

While complementary learning materials, teaching materials, and teacher training have been shown to be effective in improving instructional practices and increasing the reading achievement of students, lingering questions still exist on the cost-effectiveness of complementary reading programs because of a lack of data.²⁶⁹ Patrick McEwan's meta-analysis of 76 randomized controlled trials on student learning in developing countries lamented that so few studies and programs report cost data. In his meta-analysis, nearly 56% of interventions reported no details on the costs of their programs, while the remaining programs provided minimal information on costs.²⁷⁰

Indeed, our stakeholder interviews confirm the range in teacher training costs for reading programs. One stakeholder noted that training costs for a new community library project totaled nearly 67% of program costs. These costs included training for advocacy, basic and advanced ICT skills building, impact evaluation and assessment, how to engage communities for needs assessment, project management, strategic visioning for libraries, etc.²⁷¹ Other stakeholders suggest that at least one third of complementary reading program budgets should be dedicated to training, although this rarely happens.

In addition, there is also a variety of recommendations on the number of titles a child should read in a year (Figure 15). According to a position statement by the International Reading Association, school libraries should have a minimum of 20 books per child, and classroom libraries should have about seven per child.²⁷² Fountas and Pinnell recommend a collection of about 300–600 books in a classroom library, depending on grade level and number of copies of each title. They calculate that first grade students should read between 100–125 books a school year and 50–75 longer books for students in grade 2.²⁷³ Room to Read seeks to have 5–8 books per child in each primary school library (separate or classroom), with a global average of about 1,500 books per library.²⁷⁴ Interviews with other experts resulted in a range of titles from 60 to 300 titles a year.

Ideally, children should be able to access hundreds of titles over a course of a year with options of reading outside of their graded reading series components. In a US study, the average child growing up in a middle class family is exposed to 1,000 to 1,700 hours of one-on-one picture book reading before entering

²⁶⁷ Good Planet Foundation. (2013). *Accelerating Progress in 2015: South Sudan*. A Report series to the UN Special Envoy for Global Education.

²⁶⁸ India Case Study – see Annex 3.

²⁶⁹ Sailors, M., and Flores, M. (2014). Cost Effectiveness of a Complementary Reading Program. *Journal of Education and Human Development*, 3(4), 1–20.

²⁷⁰ McEwan, P. (2015). Improving Learning in Primary Schools of Developing Countries: A Meta-Analysis of Randomized Experiments. *Review of Educational Research*, 85(3), 353–394.

²⁷¹ Hoerner, Darren. (2015). Gates Global Libraries Project. Interview conducted by R4D. 23 September 2015.

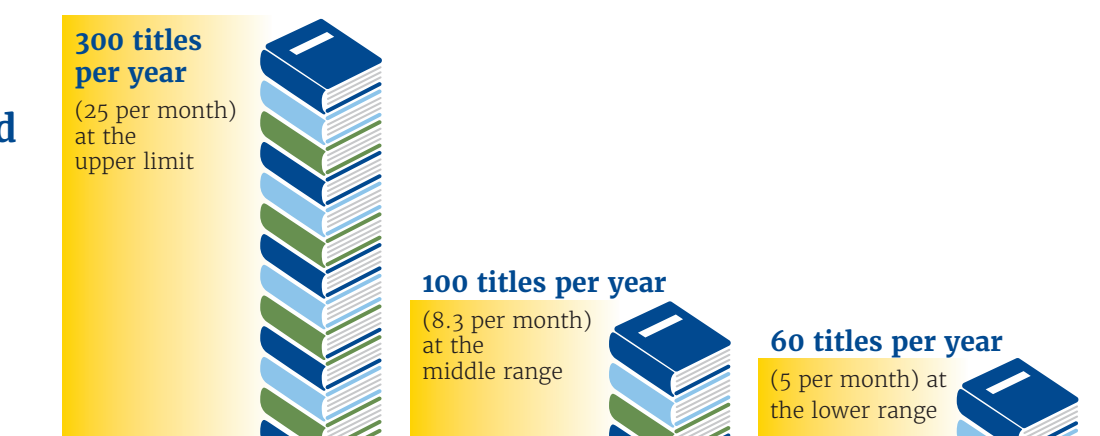
²⁷² International Reading Association. (1999). Position statement.

²⁷³ Fountas, I., and Pinnell, G.S. (1996). *Guided Reading: Good First Teaching For All Children*. Portsmouth, NH.

²⁷⁴ Berger, Alisha. (2015).

Figure 15. Range of estimated number of titles a child should read in a year²⁷⁵

Estimates of the number of titles a child should read in a year range from:



school.²⁷⁶ In primary classrooms, teachers should dedicate at least 45 minutes each day to uninterrupted reading and writing.^{277,278} The more practice hours a child has with a book of their own choice, the more proficient they become at reading.²⁷⁹ Unfortunately, both graded reading materials and instructional time itself are very constrained in many countries. In some schools in Uganda, for example, some fourth graders only effectively have about 1 hour and 52 minutes of the almost 7 scheduled hours a day of instructional time where the teacher is attending to the task of learning.²⁸⁰ A similar situation exists in Kenya, Senegal, and Tanzania.^{281,282,283}

Despite the challenges in identifying the number of titles needed per student, any ideal ratio of titles per student per year should consider various variables such as the type of library model used, the practice time a child has per book, student characteristics, and number of pupils in a class. Relatedly, the book per pupil ratio will also depend on curriculum requirements, funding, and book usage policy.

Given the variety of positions on ideal number of titles per child and number of practice reading hours, a GBF could develop and share recommendations for best practices. In order to do so, a GBF could fund studies on the cost-effectiveness of various reading book and practice time models within different country contexts. Such research activities would fit within a GBF's global public goods function, as will be further discussed in Section 4.1.

2.3. Lessons from global health funds

Analysis of the global health funds highlights the many differences between schoolbooks and the services and commodities the health funds were created to support (Box 11). It thereby argues against a straightforward attempt to replicate any of these mechanisms as a solution to the books problem. However, there are useful lessons, positive and negative, to be drawn from their experience.

²⁷⁵ Interviews with various stakeholders.

²⁷⁶ McQuillan, J. (1998). *The Literacy Crisis: False Claims, Real Solutions*. Portsmouth, NH: Heinemann.

²⁷⁷ US Department of Education, America Reads Challenge. (1999). *Start Early, Finish Strong: How to Help Every Child Become a Reader*.

²⁷⁸ National Research Center on English Learning & Achievement. (1998).

²⁷⁹ Allington, R. (2002). What I've learned about effective reading instruction from a decade of studying exemplary elementary classroom teachers. *The Phi Delta Kappan* '83 (10).

²⁸⁰ Wane, W., and Martin, G. (2013).

²⁸¹ World Bank. (2013b). *Tanzania—April 2012. Service Delivery Indicators*. Washington, DC: World Bank.

²⁸² World Bank. (2013a). *Senegal—April 2012. Service Delivery Indicators*. Washington, DC: World Bank.

²⁸³ Gayle, M., and Pimhidzai, O. (2013). *Kenya—July 2013. Service Delivery Indicators*. Washington, DC: World Bank.

Figure 16 below describes the different commodities or services supported by the health funds and compares them to some of the key findings presented in section 2.2.

As Figure 17 illustrates, Gavi is perhaps the least relevant model for a GBF (see Box 12 for more background on Gavi). When Gavi was created, the value of vaccines was already broadly appreciated

Box 11

“It’s hard to imagine products more different than global vaccines and Hausa-language reading books!”

— Ruth Levine, Hewlett Foundation

Source: Levine, Ruth. (2015). Hewlett Foundation. Interview conducted by R4D. 12 November 2015.

Figure 16. Comparison of commodities or services supported by global funds

	New vaccines	HIV treatment	Malaria bed nets	Zinc to combat diarrhea	Local language books	Legend
Relevant global fund	Gavi	GFATM/UNITAID	GFATM/UNITAID	RMNCH Trust Fund	“GBF”	
Demand for the service or commodity from users and ministries already in place	++	++	+	Little or no awareness or demand, need to build	+ Demand weak in many countries due to lack of awareness, especially for reading books (<i>Finding 1</i>)	+ Weak demand; demand has to be built ++ Strong demand +++ Very strong demand
Affordability of the commodity	+++	+++	++	Commodity is very cheap	+	+ Obstacle to some household and countries ++ Important obstacle +++ Severe constraint
Existing systems for distributing and ensuring appropriate use	++	Systems initially not in place	Systems initially not in place	+	+ (<i>Finding 11</i>)	+ Systems present but may be a major challenge ++ Systems are strong
Opportunities for substantial savings from global market-shaping and pooled procurement	+++	+++	++	In many cases probably best to procure locally	+ (<i>Finding 6</i>)	+ Weak opportunities ++ Some opportunities +++ Major opportunities
Opportunities for savings from national market-shaping and improved procurement	+	+	+	+++	++ Potential savings from better procurement and other measures (<i>Finding 6</i>)	+ Weak opportunities ++ Some opportunities +++ Major opportunities
Impact of increased access is well-established and easy to measure	+++ Good effectiveness data, consensus on health impact	++ Impact on individuals clear, program data not available initially	++	++	+ Evidence of importance of books, challenging to disentangle from other factors (<i>Finding 7</i>)	+ Weak or incomplete data measurement systems ++ Good systems +++ Very strong

by governments and households in most low and middle income countries, and immunization systems, although imperfect, were able to achieve 70% or higher coverage with basic vaccines in most countries. The primary obstacle to the introduction of important newer vaccines was their high cost. Gavi was established to overcome this obstacle by procuring and providing these vaccines to countries that would otherwise have difficulty affording them. There were also substantial opportunities for cost savings through pooled procurement and other international market-shaping measures. These conditions are not in place for reading books, especially in local languages. However, Gavi's efforts to help countries improve distribution systems could provide lessons for a book

fund. In addition, Gavi's policies on country eligibility and co-financing offer possible models, although we favor a less rigid approach to eligibility in particular (see Section 4.3.2).

Another proposed mechanism for supporting national immunization programs, the Middle Income Countries Strategy for Immunization, although not yet operational, could be an interesting model for some aspects of a GBF.²⁸⁴ The MIC Strategy, as currently conceived, would not procure or fund vaccines itself—this would be the responsibility of national governments—but would offer a menu of technical assistance to countries, including in improving vaccine procurement, reinforcing demand,

Box 12. Overview of the Global Fund to Fight AIDS, TB, and Malaria (GFATM), and the Vaccine Alliance (Gavi)

The two largest and best-known health funds are the Global Fund to Fight AIDS, TB, and Malaria (GFATM) and the Vaccine Alliance (Gavi). GFATM, launched in 2002, disbursed about US\$2.9 billion in grants in 2014 for programs against the three diseases in more than 100 countries. Gavi, launched in 2000, spent US\$1.3 billion in 74 countries in 2014.

The two funds share important features: both are freestanding institutions, both pool resources provided by industrialized country governments and foundations, and both allocate funds in response to proposals submitted by recipient country governments—all three features representing departures from traditional bilateral or multilateral development assistance. However, the two initiatives differ in important ways as well. Probably the most important difference is that Gavi focuses narrowly on a particular intervention—immunization—and expends the majority of its resources on a commodity—vaccines, while the GFATM funds broad national strategies against the three diseases.

There is broad consensus that Gavi and GFATM have raised substantial additional donor resources for the health areas that they cover and have had very considerable impact. This has been achieved in part through strong support from major advocacy NGOs and through high-level buy-in by political leaders in donor countries. By their own estimates, programs that they have funded have saved several million lives. It is difficult to know, however, how this impact compares with what could have been achieved if these resources had been made available through traditional channels and thus to assess the success of these initiatives as *innovative financing mechanisms*. Both have also been criticized on other grounds, including for favoring vertical, disease-specific programs at the expense of broader health systems and for contributing to the proliferation of aid channels. The GFATM in particular has also suffered from revelations of large-scale fund diversion in some countries.

²⁸⁴ Middle-Income Countries Task Force. (2015). *Sustainable Access to Vaccines in Middle-Income Countries (MICs): A Shared Partner Strategy*. Report of the WHO-Convened MIC Task Force. Background paper for the SAGE's April 2015 meeting.

and strengthening supply chains. As explored in Section 4.1, we envision a GBF playing a similar role at the country level, although the GBF might also fund book procurement in some circumstances. Of course the GBF would support the poorest countries as well as perhaps some middle income countries (Section 4.3.2). The relevant feature of the MIC Strategy is not its country focus but the nature of the support it proposes to offer.

The GFATM faced some of the same challenges that a GBF would face, including weak systems for delivering HIV and malaria treatment and distributing the necessary commodities as well as poorly developed demand for some interventions. From the beginning, however, the GFATM was set up to fund holistic programs rather than specific commodities. In this way, it is perhaps more analogous to the Global Partnership for Education (GPE) than to a new fund focused narrowly on books. Another important difference is that there are global markets for some of the most important commodities funded by the GFATM, including HIV and malaria drugs and malaria bed nets, and thus opportunities for savings through pooled procurement and market-shaping. However, the GFATM has made only modest use of pooled procurement.

That said, the GFATM's emphasis on funding integrated, nationally conceived programs can be seen as an important lesson for a GBF which will not succeed until access to books is accompanied by measures to ensure that they are well used. This does not mean that the GBF must itself address use and other essential elements of education systems, but that it must either be embedded in an entity that can provide complementary types of assistance or have strong links to other aid mechanisms that can do so.

UNITAID does not in general fund national programs or take on long-term commitments in any particular area but rather funds catalytic initiatives in new or previously neglected areas with focus especially on creating and shaping markets for important health commodities (drugs and vaccines). Thus, it is not a good general model for a GBF that would take a

holistic and sustainable approach to the schoolbook challenge, but its market-shaping efforts at the national level may offer some lessons for books.

The RMNCH Trust Fund is in some ways a promising model for a GBF. Emerging from the report of a commission that highlighted lack of access to 13 important but neglected reproductive, maternal, newborn and child health commodities, the trust fund provides relatively modest funding to fill gaps in national strategies to increase access to these life-saving commodities. It funds the purchase and distribution of commodities in some cases, but as the commodities are mostly quite cheap, it focuses more on interventions to remove other obstacles to widespread use and in some cases aims to create sustainable local markets. It is not a freestanding entity, but was established by UNICEF, United Nations Population Fund (UNFPA), and WHO. However, the RMNCH Trust Fund is explicitly time-limited—it will expire at the end of 2016—and so may not be an appropriate comparison. Moreover, its structure, based on working groups focused on particular commodities, would not be relevant to GBF.

Power of Nutrition is a new mechanism for channeling aid to national nutrition programs. It stands out for its focus on raising money from non-traditional donors and private-sector sources through schemes in which new donations are matched by funds from its implementing agencies, the World Bank and UNICEF, as well as from DFID, a traditional donor. This model, which in theory allows Power of Nutrition to “crowd in” funding from its host institutions and others as well as to improve the effectiveness of these institutions' broader nutrition programs, should be explored for a GBF if it is hosted within an organization with existing education programs, as we recommend. Power of Nutrition's governance arrangements could also be a good model for a GBF.

Finally, the Global Financing Facility is an ambitious new World Bank initiative to fund the scaling up of reproductive, maternal, newborn, child and adolescent health services in 62 low and middle

income countries. It resembles the GFTAM in its proposed scale (US\$57 billion by 2030) and scope as well as in its focus on national programs, though its institutional structure as a trust fund within the World Bank is an important difference. This structure is intended to allow it, like Power of Nutrition, to

crowd in funding and integrate the programs it finances with broader World Bank programs. Again like the nutrition initiative, its governance is designed to facilitate harmonization with the host institution's policies and programs.

3. The case for a global mechanism to transform the availability and usage of books

Despite the clear evidence that books are vital to learning, our country findings and consultations with stakeholders suggest that issues and inefficiencies along the entire book chain prevent books from reaching children and increasing learning outcomes. As explored in Section 1.2, these challenges around books provision continue to persist despite the decades of funding by donors and governments alike.²⁸⁵

Our findings suggest that there is a need for a bold new intervention that transforms the sector. Traditional project-based approaches have not worked to solve the problem around the lack of high-quality books for children, and a new approach is needed. Two fundamental aspects distinguish how this proposed new intervention will be a departure from business as usual.

First, a new mechanism is needed to raise awareness on both the high returns to books at the global and country level and also to mobilize funding. As reflected in the Sustainable Development Goals (SDGs), global focus has increased on quality of education and learning in recent years. Section 1.1 highlighted the importance and cost-effective role books play in achieving this aim; however, our findings suggest that underlying demand, particularly for reading books in local languages, is significantly hindered by lack of awareness of the value of these books (Finding 1). There is also inadequate funding for reading books as well as textbooks, and for many LIC

countries, external financial mobilization is needed to close the funding gap (Finding 4–5). Given this fundamental challenge, a mechanism is thus needed to raise awareness and also to fundraise for additional resources. Current knowledge dissemination efforts include research on books—mainly textbooks—by the World Bank, UNESCO, and think tanks. The Global Reading Network also advocates for the importance of reading books, provides open access to knowledge and best practices on the subject, and aims to increase dialogue between practitioners; however, it does not focus attention at the policy or community levels.²⁸⁶ In addition, ADEA’s Working Group on Books and Learning Materials also supports awareness of TLMs and greater TLM policy dialogue across Africa, but success has been limited due in part to funding constraints.^{287,288} There is a need to leverage these efforts to ensure that governments and communities understand and value the importance of fostering a culture of reading and a concentrated effort is undertaken to prioritize advocacy and fundraising.

Second, there is a critical need for countries to access specialized technical knowledge for high-impact activities that can lead to the most significant opportunities for savings and quality improvements around the development, procurement, and supply chain management of books. Our findings show that technical assistance is also required to ensure that books are effectively used to increase learning. However, technical expertise to effectively address the underlying issues in the book chain is often

²⁸⁵ Read, T. (2015).

²⁸⁶ Global Reading Network. (2016).

²⁸⁷ ADEA. (2015).

²⁸⁸ Sow, M. Aliou. (2015).

lacking. Even though there are influential agencies already supporting reading initiatives, most do not have technical staff familiar with the book market and supply chain. For example, while the GPE has funded TLM-related activities in some countries when requested by national governments, its strategy has not specifically focused on improvement of book provision and book chains.²⁸⁹ Meanwhile, although the World Bank has funded a number of TLM projects and even provides some technical assistance, consultations reveal that technical assistance components were sometimes unable to deliver on expectations due to a lack of technical capacity in-country or within the Bank on select topic areas. Additionally, although many bilateral aid agencies have also provided technical support for TLM provision, these project-oriented efforts have limited systemic impact in the vast majority of cases (Section 1.2). Indeed, there are a few exceptions (such as Rwanda), but this finding holds more broadly.

An analysis of the benefits and costs of a new mechanism—specifically, a GBF—in contrast to using existing bilateral or multilateral channels indicates that the creation of a new mechanism is justified for three reasons:

- ▶ A new mechanism can play a critical role in harmonizing current funding in books and ensuring greater effectiveness of funds. Although a number of institutions—including the World Bank, UNICEF, and bilateral aid agencies—allocate funding and programming towards improved books provision (Section 1.2), no existing institution coordinates resources for this purpose. There may be an opportunity to create stronger coordination of funding and subsequently ensure greater transparency and predictability through the architecture of a new dedicated mechanism.²⁹⁰
- ▶ A new global entity is needed to break away from the traditional donor-project approach and instead

Box 13

“[In many countries in sub-Saharan Africa], donor, NGO, MOE demand is not usually stable but short-term and ad hoc. This prevents book chain actors from investing in book development and production... Initiatives that have lasted in the long run are usually tied to international NGOs that are working in the country long-term.”

— Richard Crabbe, World Bank

Source: Crabbe, Richard. (2015). World Bank. Interview conducted by R4D. 4 December 2015.

play a system-strengthening role.²⁹¹ It takes a period of years to change systems, and long-term focus and sustained funding is needed to support these changes (Box 13). However, many existing donor institutions operate on short project timeframes, with funding allocated for only a few short years. Thus, there is an inconsistency in the type of focus and the funding window needed to achieve sustainable, large-scale change in book provision systems and the reality of existing institutional structures.

- ▶ As Finding 4 demonstrates, low income countries will not be able to meet financing needs for TLMs. A new mechanism can elevate the focus on TLM spending and mobilize dedicated funds.²⁹² Although the experience of health funds varies by region and focus area, both Gavi and GFATM have led to the additionality of funding. However, stakeholders consulted expressed concern that the current environment might be less supportive of a new global fund, and additionality to current funding may be unlikely. Indeed, a recent evaluation of the GPE found no strong evidence that it generated significant additional donor funding for basic education.²⁹³

²⁸⁹ Global Partnership for Education. (n.d.).

²⁹⁰ Sustainable Development Solutions Network. (2015). *The Role Of Global Funds In A Post-2015 Development Framework*.

²⁹¹ Ibid.

²⁹² Ibid.

²⁹³ Results for Development Institute and Universalis. (2015). *Independent Interim Evaluation of the Global Partnership for Education: Volume I—Final Evaluation Report*.

Establishing a new global mechanism is inherently a sensitive and political topic, and the benefits described above have to be weighed against the costs. One of the most significant criticisms is that new funds can contribute to increased fragmentation and may not be needed.²⁹⁴ There is also the danger that new funds can add transactional costs, not be well integrated within the relevant sector, and stall systemic change. Other concerns are that funds may be vulnerable to corruption and may lessen or replace domestic resource mobilization.²⁹⁵ Stakeholders consulted also cautioned that there is a low appetite for a new global fund, in contrast to the political climate that existed during the creation of health funds. Indeed, an agriculture fund expert cautioned that any new entity will have to “fight the idea” that a new fund will simply be “a new source of inefficiency.”

Despite these important considerations, our analysis indicates that the benefits of the creation of a GBF outweigh the costs. While a quantitative cost-benefit analysis may not be possible, our assessment is based on the context and long-standing nature of the problem. As indicated in Section 1.1–1.2, low availability of textbooks, reading books, and other TLMs is a persisting problem that has not been eradicated despite decades of interventions and millions of dollars in funding.

In order to mitigate against potential risks, careful attention has been paid to the proposed design of the GBF (Section 4.3). Monitoring and evaluation

mechanisms for a GBF’s activities must be stringent in order to ensure safeguards against inefficiency, poor management, and corruption. Additionally, recipient country co-financing requirements are proposed to ensure that domestic resource mobilization does not dwindle in the face of funding provided by a GBF. Crucially, as explained in Section 4.3.5, we do not propose a freestanding fund, but instead recommend that the GBF be hosted within an existing entity. This structure will help consolidate efforts and complement existing initiatives. For instance, we propose that the GBF work alongside GPE’s existing efforts and network while harmonizing the book provision and awareness-raising initiatives of the World Bank, UNICEF’s Supply Division, bilateral aid agencies, NGOs, developing country governments, and others. This will help reduce fragmentation and transactional costs while making large-scale, systemic efforts more likely through unifying resources.²⁹⁶ These measures offer confidence that the benefits of sustainable, systemic change in books provision to improve the quality of education for all will far outweigh the prospective costs.

There are also significant risks in undertaking a large-scale launch of a new entity without any pilot, and this could risk undermining the credibility of the eventual mechanism. We therefore propose undertaking pilots in a start-up phase of the GBF to test and demonstrate proof of concept. As described in Section 5, such pilots can also provide evidence that will mobilize a broad range of funders, including additional donors, private sector and civil society organizations.

²⁹⁴ Bezanson, K. A., and Isenman, P. (2012). *Governance of New Global Partnerships*. CGD Policy Paper 014. Washington, DC: Center for Global Development.

²⁹⁵ Sustainable Development Solutions Network. (2015).

²⁹⁶ Ibid.

4. The Global Book Fund: recommendations and design

Our analysis suggests that there may be an important role for a new international mechanism, referred to as a GBF, to improve the provision and usage of books. Importantly, our findings show that many of the issues in the book chain are cross-cutting across both textbooks and reading books.

Section 4.1 outlines recommendations for the functions of the GBF, section 4.2 describes the Theory of Change, and Section 4.3 explores structural and operational considerations.

4.1. Recommendations for the functions of the Global Book Fund

We propose that the GBF focus its efforts on the broader book chain, leading targeted, high-impact activities to counter the challenges that prevent children from using both textbooks and reading books. The four functions outlined below form the basis of our recommendations for the GBF's activities. Careful consideration will need to be given to prioritization and sequencing, with specific activities expanded and refined over time. As will be discussed, the functions proposed below allow flexibility for the GBF to later expand its scope to other TLMs, move beyond primary grades, and consider regional and international LOIs. However, we caution that further research and analysis must be undertaken to determine the need and appropriateness of GBF support in these additional areas.

Our analysis indicates that the GBF could play a role at both the global and country level.

GBF at the global level

In order to transform books availability, the GBF must serve as a supporter and provider of global public goods relevant to books. At the global level, we propose that the GBF fill a critical gap by playing the role of a champion specifically committed to boosting the delivery and usage of all reading books and textbooks. We envision this covering a number of dimensions.

Function 1: *Develop and disseminate knowledge and best practices on the effective development, procurement, distribution, and usage of all books.*

Based on findings 2, 6, 7, 8, 13, 15, 16

Influential donors and implementation partners already support reading initiatives—for example at the multilateral level, the GPE, World Bank; at the bilateral level, USAID and DFID; and at the regional level, the Working Group on Books and Learning Materials at ADEA. However, there does not exist at the global level a dedicated technical unit with expertise to serve as a repository of knowledge and best practice, nor do most of the agencies supporting reading themselves have sufficient staff familiar with the book market and supply chain. Meanwhile, although many of the government stakeholders consulted were familiar with various books-related initiatives in their countries, political transitions and staff and policy turnovers have meant that institutional knowledge and technical knowhow are often missing.

The GBF could thus serve as a repository and generator of information around all aspects of the book chain. In addition to supply chain best practices, the GBF could aggregate specification and content quality guidelines that are crucial to ensuring that books are useable and accessible to all children. Guidelines could include shaping early grade reading books to be leveled and decodable, representing and empowering both genders equally via characters, stories, and illustrations in learning materials,²⁹⁷ standardizing book specifications, etc. These guidelines and best practices could feed into the development of standardized documents that governments could reference and adapt to their unique national contexts. For instance, expert stakeholders noted the often ad hoc nature of procurement documents, with varying and sometimes outdated guidelines copied and reused from old tenders.²⁹⁸ To curtail this issue and improve the efficiency of book procurement, Senegal recently developed its own Standard Bidding Document by referencing the World Bank's Standard Bidding Document.²⁹⁹ Indeed, the GBF could play a role in not only helping to create and disseminate normative procurement standards, but also require adherence to these standards as a basis for any sort of country-level funding. Research on policy environments that affect the success of books provision could also be undertaken or shared by the GBF. For example, the impact of early versus late exit LOI policies could be further studied, as these policies are critical to fostering sustainable reading and learning gains and affect the provision of books.

Consultations also reveal a lack of coordination and content sharing amongst donors, NGOs, and MOEs. Even where titles exist and are published, access is well below its potential due to a lack of coordination and content sharing among donors, NGOs, and MOEs. The GBF's global function could improve synergies and coordination, thus reducing inefficiencies and supporting content sharing arrangements and open

license content generation models. Further research will be needed to determine the most appropriate strategies for content sharing and open licensing.

The mechanism could also serve as a holding place and coordinator for all related activities and analyses already underway, including the content generation activities being undertaken by Bloom Software through the "Enabling Writers" competition; title access activities through Pratham Books' StoryWeaver initiative, African Storybook Project, and the development of a Global Reading Repository; and the piloting of the "Track and Trace" initiative to improve supply chain management. Similarly, the GBF could facilitate data sharing on books-related investments and activities between donors, NGOs, and governments to improve coordination and provide a comprehensive global, regional, and national view of books initiatives. There is a need also to institutionalize workshops and technical forums to convene different types of stakeholders, including publishers. The GBF could possibly take on this role through a joint arrangement with the Global Reading Network, merging the GRN into it, or building on ADEA's Inter-Country Quality Nodes initiative.

Function 2: Advocate and instill the importance of reading materials, and gain buy-in from champions to spur long-term policy dialogue.

Based on findings 1, 13

Our analysis shows that in many countries there is a lack of awareness on the value of reading books, particularly in mother tongue languages. For any books initiative to succeed, a priority must therefore be to raise the value and demand for books and to instill the importance of such reading materials.

Limited awareness is seen at both the level of government and at the community level (Finding 1). For example, in India government actors lack understanding of the importance of reading books

²⁹⁷ Benavot, A. (2016).

²⁹⁸ Barth, Christophe. (2015).

²⁹⁹ Mbaye, Mamadou Mansour. (2016). World Bank. Interview conducted by R4D via email. 11 April 2016.

Box 14

“A key issue is the need to convince the state ministry of education of the importance of reading books in class.”

Source: India Case Study—see Annex 3.

(Box 14). In Kenya, consultations indicate that enhancing the use of numerous underserved local languages will require an intensive public information campaign on the positive benefits of local languages and teacher training to increase teacher skills and knowledge in reading, writing, speaking, and listening in these languages.³⁰⁰

Thus, increasing the importance of books is a foundational step to engage and inform parents and communities, and in tandem, influence policymakers. The GBF could play a leading role in directly elevating the conversation at national levels, spurring policy dialogue with MOEs and other government actors. Additionally, as discussed in Function 3, the GBF could provide funding to country-level actors to undertake advocacy initiatives aimed at raising awareness of the value of books and fostering a culture of reading within communities, schools, and homes. For instance, similar to grants provided through the Reproductive Health Supplies Coalition Innovation Fund,³⁰¹ the GBF could consider awarding small grants to NGOs, either directly or as a component of country proposals, to rapidly boost awareness of the value of reading books and a reading culture. Specific consideration of populations with particularly limited access, such as girls and disabled populations, may be needed in messaging and outreach to ensure that they also benefit from the GBF’s advocacy efforts.³⁰² In addition to advocacy campaigns, such funding could also support regional book fairs and other events specifically focused on supporting children in learning to read and reading to learn within school and home contexts.

GBF at the country level

At the country level, we propose the following.

Function 3: Fund technical assistance to improve the development, procurement, distribution, and usage of books to improve learning outcomes.

Based on findings 4, 6, 7, 11, 12, 15

Country context and need will determine the precise nature of technical assistance and expertise required to strengthen the availability and use of books within a particular country.

We propose that each participating country, supported by in-country partners (e.g., NGOs and library organizations) and as needed by technical experts, conduct a comprehensive assessment to determine the ‘health’ of its book chain. Alternatively, countries could leverage existing national education sector plans to identify needs and areas for support. The GBF could provide guidance and technical support for such assessments. The country-driven assessments could then form the basis for proposals to the GBF to request specialized technical support. For example, this could include expert knowledge on the development of new titles in LOIs with inadequate titles, guidance on procurement best practices, distribution support to ensure books reach schools from district warehouses, and guidance on usage to ensure that books are used effectively in the classroom to boost learning levels.

Given that the new entity must get away from the current, ineffective business-as-usual approach and transform the books sector, we envision the GBF adopting a lean, nimble role. We therefore recommend that the GBF fund the provision of technical assistance but not itself assume responsibility for its provision. Instead, experts could be contracted by countries to provide technical support as needed. The GBF will need to have a select number of technical

³⁰⁰ Kenya Country Report – see Annex 3.

³⁰¹ Reproductive Health Supplies Coalition. (2016). Innovation Fund.

³⁰² UNESCO. (2009).

experts to oversee consultants and run its global activities—and can maintain rosters of consultants in the various stages of the book chain—but should not itself become a large-scale agency focused on technical provision.

Indeed, this is an important lesson from the health sector. While health funds finance technical support, few include technical assistance *provision* as part of their mandate. For example, the RMNCH Trust Fund spent nearly 50% of trust fund resources funding training and technical assistance.³⁰³

In addition, we propose that a GBF provide flexible program funding to complement funds for technical assistance. Such programmatic funding could be used specifically to bolster the demand side and to ensure that books are effectively used to improve learning outcomes. For example, such funding could be used to raise awareness of the value of books, support teacher training on book management and storage, and foster accountability systems and other mechanisms to ensure that books are effectively used to improve learning outcomes.

Again, the success of flexible program financing has been seen in the health sector. When Clinton Health Access Initiative (CHAI) launched its UNITAID program, few in-country staff knew how to run infant diagnostics tests for HIV/AIDS. UNITAID was able to very quickly allocate catalytic program funding to train ministry lab workers. By 2009, UNITAID had 4,600 sites testing infants across Africa, versus 200 in 2005. CHAI executives involved in this program cite the vital importance of the pairing of the product and the flexible product funding to achieving these results.³⁰⁴

As mentioned in Section 3, the GBF must move away from a project-by-project approach to effect systemic change. Numerous studies, spanning multiple

sectors, recognize the failure of short-term technical assistance to catalyze sustainable change in national systems.^{305,306,307} These studies emphasize capacity building as a long-term process and highlight its misalignment with traditional support windows. Thus, the GBF's provision of technical assistance provision is envisioned to be a series of punctual, short-term assistance that is sustained over a long period of time.

Section 4.3.1 further explores our recommendations for the funding model and Section 4.3.2 explores criteria that could be used to allocate funding.

Function 4: Fund reading books in mother tongue languages that correspond to LOIs where there is demonstrated financial need and country commitment.

Based on findings 4, 5, 6, 7

Our fiscal analysis (Finding 4–5) makes clear that LICs, in particular, have significant financing needs if they are to meet minimum textbook and reading book provision and use standards. Relying on domestic sources of finance to ensure basic standards of book provision will be difficult for the Group 1 countries in our analysis. For countries that demonstrate financial need, we propose that the GBF provide multi-year funding to supplement government resources to purchase reading books, increase demand predictability, and engage and build local publishing capacity. Governments could be required to provide co-funding and/or adopt certain management and operational best practices. As Finding 6 demonstrates, strengthening the local publishing industry may be very important for long-term, sustainable provision of books. The GBF would therefore need to engage with local publishers to strengthen the quality and efficiency of their production practices.

³⁰³ Pronyk, P. (2015). *UN Commission on Life Saving Commodities: Progress to date and the post-2015 agenda [PowerPoint slides]*. RMNCH Strategy and Coordination Team.

³⁰⁴ Schroder, Kate. (2015). CHAI. Correspondence with Kanika Bahl. August 2015.

³⁰⁵ World Bank Operations Evaluation Department. (2015). *Capacity Building in Africa: An OED Evaluation of World Bank Support*. Washington, DC: World Bank.

³⁰⁶ World Bank Task Force on Capacity Development in Africa. (2005). *Building Effective States: Forging Engaged Nations*.

³⁰⁷ De Grauwe, A. (2009). *Without capacity, there is no development*. Paris: UNESCO International Institute for Educational Planning.

In certain circumstances, for example in emergencies or where government procurement capacity is absent, the GBF might directly procure books from publishers.

Our analysis of market-shaping opportunities suggests that facilitating pooled procurement of reading books at the national level could allow for significantly larger print runs and therefore drive cost savings: moving from a 5,000 to a 25,000 print run size corresponds to a 33% savings per book. However, pooled procurement at the regional level across countries with common languages would only be relevant if funding for reading books remains limited in each country such that full-potential print run sizes are not realized.³⁰⁸ As part of Function 3, the GBF could thus fund technical support to countries to develop a system where there is local autonomy over book choice in the context of centralized national procurement; through Function 4, it could require and support pooled procurement at the national level.

All functions of the GBF have been purposely designed to take on the broader challenge around access and provision of all books. However, we propose that in its initial stage, Function 4 prioritizes funding pre- and primary grade reading books in mother tongue languages that correspond to LOIs, given the critical role that this plays in improving literacy and the severe shortages of reading books in some languages and some countries. Over time, the GBF might, in certain circumstances, also move to fund the provision of textbooks and other TLMs, to expand its scope to regional and international LOIs to ensure that literacy and learning gains are not lost when language transition occurs, and to expand to higher grade levels. However, this is not proposed initially, due to the more urgent need to provide primary grade reading books in mother tongue LOIs.

4.2. The Theory of Change

The theory of change and pathways of impact envisioned in the GBF functions described in Section 4.1 are shown in Figure 17 below.

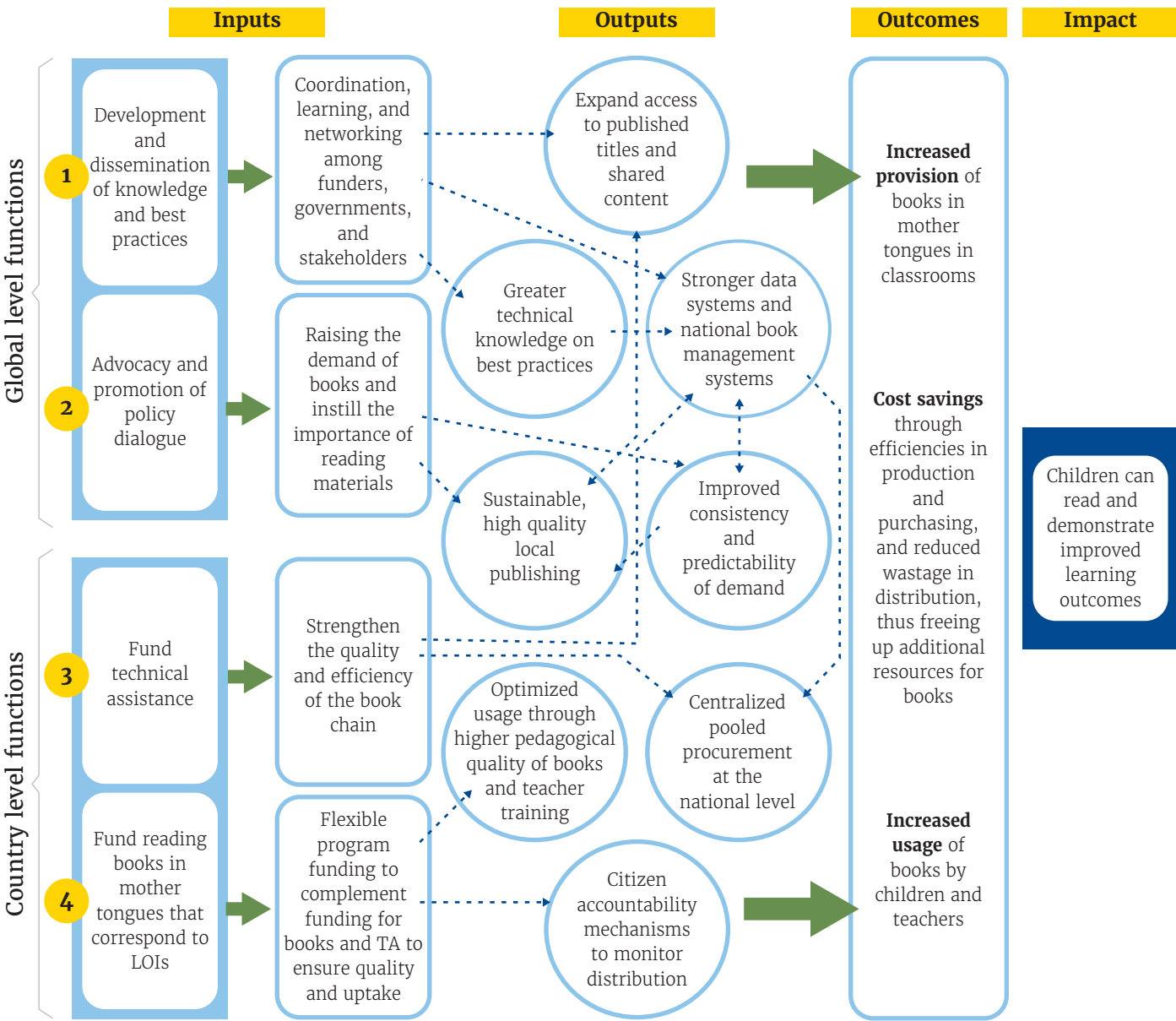
At the global level, the GBF's making available knowledge about books, book procurement, supply chains, and book use will represent a resource on which all countries can draw. Its advocacy efforts will contribute to changing the way that books, especially reading books, are thought about by educators and MOEs. Its global-level activities will provide a foundation for the success of country-level activities, which will fund targeted, high-impact support—and in some cases may entail funding reading books or procuring them directly—to improve the quality and efficiency of the book chain.

In order to ensure book quality and that provision of books translates to improved literacy outcomes, the GBF will need to pay careful attention to the inclusion of flexible program funding, particularly around pedagogical quality and usage. Three country scenarios are envisaged:

- a) Reading programs exist and are satisfactory, and high-quality books are being effectively leveraged in classrooms. Such instances may be rare, but where they exist, the GBF can focus on the book chain;
- b) Reading programs do not exist but are being installed through other donor-financed programs, for example, those of USAID's All Children Reading initiative (now active in 42 countries), the country reading programs now supported bilaterally by DFID, and the activities of other donors including the Global Partnership for Education. In such instances, the GBF can enter into trilateral arrangements with the government and the donor to ensure that the books it finances are used; and

³⁰⁸ Full-potential print run size is defined as roughly 50,000 copies, as per-book savings are marginal above this amount (Finding 7, Section 2.2.2). As previously examined, if reading book funding increases significantly such that 50,000 print run sizes can be realized in each country, pooling volumes across countries would provide limited benefit given that cost savings are marginal above this volume level.

Figure 17. Envisioned GBF theory of change and pathways of impact



c) Reading programs do not exist or are inadequate: in such cases, the GBF can use flexible program funding to address issues around book quality and teacher training; where possible, training on the use of reading books will be integrated into broader teacher training programs.

Taken together, the GBF’s efforts are intended to change the paradigm so that governments will finance and provide sufficient appropriate books for

all teachers and children to use in primary school, resulting in improved reading and also in improved learning overall. As can be seen in Figure 18, the theory of change is not linear and the various outputs influence each other. The creation and development of best practices at the global level will also influence the technical assistance provided, and will serve to not only strengthen the book chain’s effectiveness but also its quality. Similarly, a focus on advocacy and

political buy-in at the global level, together with co-financing requirements at the country level, can serve to increase government spending and ownership.

At the global level, it will be difficult routinely to determine the results that will follow from the GBF's actions. The GBF's fundraising efforts could be measured by funds mobilized, but other monitoring efforts will be limited to recording requests for information, website hit rates, and the like, supplemented with regular following up with surveys of those using the resources to find out how they used them and what difference they found them to have made. The impact of the country-level work will be easier to measure. Its funding is expected to result in a greater supply of reading books, including new titles in languages where few currently exist; improved planning, budgeting and sustainable financing for textbooks and reading books; improved and more transparent book procurement and distribution, again for textbooks and reading books, with reduced losses and lower unit costs; greater use of reading books by teachers and students; and ultimately improved learning, especially improved reading.

The impact of the GBF's country-level financing will depend crucially on the extent to which there is political will to reform systems that often involve vested interests and sometimes also corruption. Importantly, before entering into operations in a particular country (Function 4), the GBF will need to assess environmental factors, potentially through consultations with any existing donor efforts. Specifically, it will only be able to operate in a country if there is sufficient political will. If there is not, there will be substantial risks and the GBF will need to make clear to national authorities what needs to be done before it can support funding of reading books.

It will be important in the pilot phases of the GBF to test and develop its capability to operate under a mix of country scenarios, and in the process develop protocols for assessing country political will and reading programs. The need to influence and leverage existing reading and literacy efforts and ongoing

initiatives also has implications for the institutional hosting of the GBF (Section 4.3.5).

4.3. Structural and operational considerations

Following from our discussion in Section 4.1 on the activities of a GBF, we now put forward options and recommendations on design issues, including:

- ▶ Funding and implementation model
- ▶ Country eligibility, “graduation,” allocation across countries
- ▶ Country co-financing
- ▶ Monitoring and evaluation
- ▶ Institutional structure and governance

The proposals outlined here are influenced by lessons learned from global health funds.

4.3.1. Funding and implementation model

As indicated in Section 4.2, we recommend that at the country level, the GBF (a) fund the provision of technical assistance in a variety of areas and (b) provide funding for reading books in local languages that correspond to LOIs where there is demonstrated need and country commitment. We propose that the GBF provide cash *grants* and *fund technical assistance* to eligible countries in response to country proposals which would be assessed by a technical committee and then approved by a governance body. Among the questions that need resolving—which might be addressed in Phase 2—are:

- ▶ Whether responsibility for the development and submission of funding proposals would reside with ministries of education or would be assigned to an entity at the national level bringing together other stakeholders. In countries supported by the Global Partnership for Education, this body would presumably be the Local Education Group (LEG). Although the performance of LEGs has been mixed—the recent GPE evaluation found that they were often quite active in proposal preparation but less so in monitoring implementation—it

would be difficult to justify the establishment of a new stakeholder body at the country level. GFATM makes use of a similar group at the country level, the Country Coordinating Mechanism, to review proposals and oversee grants. In contrast, Gavi works directly with national governments while trying to ensure the involvement of other stakeholders at the national level in other ways. Whether the proposal comes from the MOE or another entity, technical assistance in assessing needs and preparing proposals may be useful, and it might make sense for the GBF to support this kind of assistance in some circumstances.

- ▶ Whether and in what circumstances the GBF would directly fund recipients other than national governments, such as local governments, NGOs, libraries, publishers, or other for-profit entities. The GBF could also consider how to foster public-private collaboration, particularly when such systems work in parallel without building on existing synergies. Options for different points of entry for books—for example, whether in classrooms or community libraries—should also be explored.
- ▶ To what extent GBF grants would piggyback on broader education sector programs of other donors and rely on implementation partners already engaged in these initiatives. This may depend on whether the GBF is hosted by an existing education funder (see below).
- ▶ In what cases and to what extent, if any, the GBF not only provides funding for countries to contract experts but also provides technical assistance itself. In order to ensure a country-driven process, we recommend that the GBF not itself assume responsibility for the provision of technical support except in exceptional circumstances.

The GBF would develop the capacity to carry out some of its global activities in-house, while pursuing others through grants and contracts.

Initial analysis also included consideration that a GBF might be able to use innovative financing techniques to raise funds and to procure books, building especially on the examples of the Advanced Market Commitment (AMC), used by The Vaccine Alliance (Gavi) to develop new vaccines, and the International Facility for Financing Immunizations (IFFIm), used to finance vaccination programs. The former encourages new vaccine development by committing to purchase them once they are created; the latter uses bond financing to raise cash for vaccination programs, the long-term bond and interest payments being covered by future payments from donor aid programs.³⁰⁹

However, the market for books is much smaller than that for vaccines, at about US\$4 billion a year for all primary textbooks and reading books in low and middle income countries and at only US\$1.2 billion for reading books (Finding 3). Moreover, there is no major financing need to generate new reading book titles. Such financing needs are relatively small and can likely be met simply by committing to purchase predictable quantities without the need for a complex new financing instrument.

By contrast, there may be scope for using results-based financing (RBF) techniques as part of the GBF's country funding model to help to ensure that books are supplied, distributed, and used. By tying payments to results at the different stages of the book supply chain, well-designed RBF approaches might alter incentives and help to address the well-documented problems of distribution and use—books that are procured but do not reach schools, or reach schools but are not used. The challenge would be to define appropriate outcome measures to which funding could be tied. While it should be possible to monitor the timely arrival of books in schools, documenting appropriate use would be more challenging. RBF is no panacea—some initiatives have yielded promising results while others have not— and many results-based aid initiatives (where funds are specifically

³⁰⁹ A recent Global Education Monitoring Report paper argues that a Gavi-like mechanism could be useful for textbooks, including pooled procurement as well as innovative financing. UNESCO. (2016a).

disbursed to governments) are still “cautious adaptations of conventional approaches.”³¹⁰ However, interest in RBF is expanding and this could be an important area of experimentation and innovation.

Indeed, the World Bank recently announced that it would commit US\$5 billion to RBF for education programs over the next five years; its Results in Education for All Children (REACH) trust fund, funded by Norad, USAID, and the Germany Federal Ministry for Economic Cooperation and Development via the World Bank Trust Fund, is testing RBF strategies.³¹¹ These projects could serve as models for further testing its scope within the GBF. We propose that this is further studied in Phase 2 of the analysis.

4.3.2. Country eligibility, graduation, and allocation

We propose that eligibility to apply for technical assistance from the GBF be quite broad, perhaps including all low and middle income countries, as the bulk of the world’s poor are now increasingly in MICs, specifically LMICs.³¹² For upper middle income countries, however, support from the GBF should be time-limited and these countries should perhaps be asked to contribute to the cost of the TA. To receive funding for books, however, countries should have to demonstrate both need and government commitment, and poorer countries should have priority. We do not recommend a hard eligibility cut-off based on country per capita income as used by Gavi, as such a rigid approach would foreclose the opportunity to play a useful catalytic role in somewhat better-off countries where the availability of some funding for books might be useful leverage for policy reform and help to unlock government funding for books on a larger scale. In fact, Gavi’s engagement with India provides an interesting model. Gavi plans to provide short-term, partial funding to introduce three new

vaccines before India graduates from Gavi support altogether. In return, the Indian government commits to providing the remainder of the necessary funding for introduction of the vaccine and to sustaining the new programs going forward. The Gavi support is expected to allow India to introduce the new vaccines sooner than would have been possible otherwise.³¹³

Book funding for relatively better-off countries (for example, Group 2 and 3 countries) could be time-limited to reflect the judgment that these countries have the fiscal capacity to pay for books but may need time to make the necessary budget adjustments. Funding for the poorest countries (Group 1) should not be explicitly time-limited but could be phased out if and when government ability to pay increases with economic growth. Gavi’s innovative but still largely untested graduation policy could provide a model for such an orderly phase-out of support. Such a process may be necessary only for the subset of countries that receive funding for books, as opposed to technical assistance only.

Although eligibility would be quite broad, the GBF would almost certainly need a mechanism for allocating funding if resources are insufficient to fund all technically sound proposals. This could be done either by defining a maximum funding envelope or allocation for each eligible country, as the GPE does, or by using a mechanism for ranking country proposals. Gavi has a proposal prioritization mechanism but has not so far had to use it. In its new funding model, the GFATM has moved to an allocation system, in which country envelopes are defined by a formula that takes into account country income level as well as population and disease burden.

An allocation model for the GBF should also consider income or other measures of ability to pay for books—better-off countries should normally receive less support per pupil—but could also consider

³¹⁰ Perakis, R., and Savedoff, W. (2015). *Does Results-Based Aid Change Anything? Pecuniary Interests, Attention, Accountability and Discretion in Four Case Studies*. CGD Policy Paper 52. Washington, DC: Center for Global Development.

³¹¹ World Bank. (2016). *Results-Based Financing (RBF) and Results in Education for All Children (REACH)*. The World Bank Group.

³¹² UNESCO. (2015a).

³¹³ It should be noted, however, that Gavi’s support to India does not constitute an exception to its eligibility and graduation policy, as India has not yet crossed Gavi’s GNI per capita threshold for eligibility.

measures of government commitment to education and performance on previous grants. Proposal quality would still matter: the country envelope would set the upper bound, but countries would have to build a strong case to receive any support.

A proposal prioritization model can also take into account country income and need as well as other considerations. A disadvantage of this approach, however, is that its all-or-nothing nature makes funding unpredictable for countries.

It will be easier to decide which is appropriate once there is a better sense of available resources and demand for support from a GBF.

4.3.3. Country co-financing

Both Gavi and GFATM require countries to share the cost of funded programs, in Gavi's case by independently procuring an agreed fraction of vaccines, in the case of the GFATM by demonstrating that a certain share of program costs are coming from domestic resources. The goal of these requirements is two-fold: to demonstrate and build national ownership and commitment to the programs in question, and to prepare countries for assuming full responsibility for funding them once donor financing is no longer available. These policies are thus a central part of the two organizations' strategies for ensuring that programs begun or expanded with their support are sustained. However, given that these policies are still relatively young, it is too early to say if these strategies will succeed.

We propose that some form of co-financing also be a central part of the GBF strategy. Gavi's system of parallel procurement is cumbersome and not appropriate for the GBF which will probably not procure books directly except in exceptional circumstances. Countries receiving support for book purchases should be required to contribute a meaningful share of the cost, however, and support should be contingent on putting in place budgetary

processes that make reliable and timely funding possible. The required share should depend on country income and other considerations. For the poorest countries, it may make sense to fund books on a long-term basis, while in better-off countries, book funding should be explicitly time-limited, with an agreed schedule for replacing external with domestic resources.

4.3.4. Monitoring and evaluation and accountability

The GBF will need to have its own robust M&E system and will also need to support country M&E systems. A robust GBF M&E system can ensure quality assurance, safeguard against fund diversion, and demonstrate project effectiveness and efficiency. Additionally, a strong M&E system will also be crucial in evaluating country performance. Indeed, decisions on phasing out book funding for Group 1 countries and on country graduation and grant allocations will depend on the availability of robust performance data. At the country level, systemic data on books provision, collected through M&E systems, can also serve as an important global public good. Indeed, findings from our country case studies suggest that EMIS data is often unreliable or limited in nature. For instance, EMIS data in Nigeria was last published in 2003, and our country studies in South Sudan, Tanzania, and Ethiopia suggest that EMIS data is also in need of updating and lacks reliability. When reliable EMIS is present, it can often be limited in scope, not covering all data required for effective decision making.

A review of country-level M&E systems indicates that governments often face two key challenges in developing robust M&E systems: (i) limited funding and internal capacity to respond to increased requirements/demand for M&E and (ii) difficulty institutionalizing and coordinating M&E systems.³¹⁴ Careful attention and consideration must thus be paid to the structure and design of an M&E system.

³¹⁴ Biscaye, P., et al. (2015). *Evaluating Country-Level Government M&E Systems*. Prepared for the Development Policy and Finance team of the Bill & Melinda Gates Foundation. Evans School of Public Affairs, University of Washington.

First, the GBF's M&E structure must address the tension between balancing the benefits of M&E with the often high transaction costs of gathering robust data. Experiences from health funds indicate that the cost of collective M&E requirements can become extremely onerous for countries, with significant time, capacity, and attention invested in meeting information requests. To reduce some of this burden and to adhere to global aid effectiveness agreements (Paris, Accra, Busan), we propose that the GBF align its M&E as much as possible with not only its host organization (as recommended in Section 4.3.5) but also with information that countries are already collecting. Where possible, M&E indicators should be common to donors and governments. In this way, the M&E structure should not only allow the GBF to track use and effectiveness of funds allocated but should be responsive to the needs of actors at the country level.³¹⁵

Gavi's M&E model may be a relevant example of an integrated and aligned system. Gavi uses a tiered M&E approach by gathering information from routine program monitoring, targeted studies, and full country evaluations. The tiered system leverages existing data collected through established monitoring systems (that report to WHO) with new data collected through targeted studies and country evaluations.³¹⁶

Second, in order to support a robust system at the country level, we recommend that the GBF provide sufficient funding for technical support to countries in order to build internal capacity and country ownership in M&E and EMIS data management. Government M&E systems often have weak standards for data collection and verification and infrequently train staff on data management and collection.³¹⁷

Third, we also discourage the use of rigid M&E frameworks. Given the expectation that a GBF will fund multiple activities, M&E systems need to be

flexible enough to be able to track various indicators. Although it is too early at this feasibility study stage to consider possible indicators that may be relevant for books, it should be noted that indicators should expand beyond simply tracking enrollment and numbers to more closely monitor inputs and learning.³¹⁸ More work in this area will be needed if the decision is made to proceed with a GBF.

4.3.5. Institutional structure

The first choice that must be made is whether the GBF should be a freestanding entity or should be “hosted” by an existing institution or partnership that already provides assistance to education in developing countries. We conclude from our analysis, which weighed these options against a broad range of criteria (Appendix 5), that it would be preferable for the GBF to be hosted by an existing organization if an appropriate and willing host can be found. The main advantages of this option are cost—the GBF would not have to develop all the necessary structures and capabilities of a freestanding financing organization—and greater integration, in that it would be easier to ensure that the GBF's investments were well coordinated with complementary investments in the education sector, for example in teacher training. A hosted GBF would also be more consistent with aid principles (the Accra agenda), as it would not add to the already burdensome array of aid organizations with which countries must engage. Given considerable reluctance to create new international mechanisms, it will also be essential that the GBF be as lean an operation as is compatible with its functions; housing it within an existing organization should help contribute to this.

Not only does a self-standing option seem unattractive, so do those involving bilateral donors and the private sector, even when these are heavily involved in education. Bilateral aid agencies, even large ones such as USAID and DFID, limit the

³¹⁵ Naidoo, Jordan. (2016).

³¹⁶ GAVI Alliance. (2015). *Monitoring and Evaluation Framework and Strategy*. Gavi.

³¹⁷ Biscaye, P., et al. (2015).

³¹⁸ Naidoo, Jordan. (2016).

number of countries in which they operate and so are inappropriate for hosting a Fund that should potentially serve all countries, or at least all low and middle income ones. Private institutions fall into three categories: private firms, like international publishers, which would not be viewed as sufficiently neutral to host the Fund; private foundations, which might be considered appropriate but, like bilateral aid agencies, do not generally have a large enough global footprint; and international NGOs, which may also be viewed as insufficiently neutral.

By contrast, multilateral agencies, such as UN agencies, cover all countries or at least all countries in certain categories (as with the Global Partnership for Education that covers all low and lower middle income countries). They are also public and therefore less likely to be thought of as having particular viewpoints. The principal multilateral agencies involved in education are GPE, UNESCO, UNICEF, the World Bank, and the regional multilateral development banks. However, the regional banks, by definition, are not global and UNESCO does not typically handle large funds, although it may be well placed to support the global functions of a GBF given its UIS database and the fact that its research activities span textbooks and education curriculum.³¹⁹

Candidate host agencies are thus likely to be GPE, UNICEF, and the World Bank. In order to inform this study in a preliminary way, senior officials of each were interviewed to ascertain their willingness to consider hosting the Fund. These initial reactions will need to be probed more formally and carefully at a later stage. Our consultations revealed the following broad points:

- ▶ GPE is willing to explore the idea of hosting a GBF. Not only do the broad objectives of a GBF align with its mission of promoting basic education in low and lower middle income countries, but there exist a range of potentially useful collaborations,

such as with UNICEF's Supply Division, that GPE is well placed to advance.³²⁰

- ▶ The World Bank is reluctant to serve as the host: the considerable internal change that it is undergoing at present means that it might not be able to focus appropriately on a new Fund. Additionally, senior management's current sentiment is not generally in support of new vertical funds. The Bank is, however, cautious about the idea of GPE taking on the role, given what it perceives as the need for GPE to focus on its core mission, and recommends thinking about separating the expertise and the financial aspects of the Fund into separate institutions.³²¹
- ▶ UNICEF does not rule out the possibility of such hosting, or supporting the implementation of the Global Book Fund, including exploring what role might be played by its Supply Division. In 2014, UNICEF supplied 16.3 million children with learning materials, mainly through its country offices; however, UNICEF does not currently have any centralized expertise for reading book provision.³²² UNICEF's status as an implementer would also need to be carefully evaluated to determine if a potential conflict of interest might exist.

A potential disadvantage of operating within an existing organization is that it would be a less dramatic way to attract attention to the book problem. Based on our interviews, however, it seems unlikely that in the current environment a free-standing GBF would attract the kind of large-scale funding that Gavi and GFATM have attracted, which would justify the high costs of establishing an entirely new entity.

Hosting could take many forms, ranging from, at one extreme, opening a new "window" for funding related to schoolbooks within an existing education financing mechanism, much as Gavi regularly opens windows for new vaccines, to establishing a quite autonomous entity with its own governance structures, secretariat,

³¹⁹ Naidoo, Jordan. (2016).

³²⁰ Albright, Alice and Mundy, Karen. (2016). Global Partnership for Education. Interview conducted by R4D. 12 January 2016.

³²¹ Dar, Amit. (2016). World Bank | Education Global Practice. Interview conducted by R4D. 8 January 2016.

³²² Bourne, Josephine. (2016). UNICEF. Interview conducted by R4D. 8 January 2016.

and operating procedures within a host organization. More complicated arrangements are also possible, under which different existing organizations assume responsibility for different functions of the new entity. The best arrangement will depend on the available hosts, on the extent to which their existing capacities and structures are a good fit for the GBF, and on their willingness to allow autonomy and deviation from their standard model.

In addition, it will be important to build in regular reviews (perhaps every 2–3 years) of whether the host agency is adequately performing its role and, if not, of the appropriateness of moving to another host agency. Such an incentive will be essential for a host agency to pay appropriate attention to its role as host. Independent evaluations can be used to assess such hosting arrangements. For example, the independent Phase IV Mid-Term Evaluation (2012) of the Consultative Group to Assist the Poor (CGAP), housed within the World Bank, surveyed and commented on hosting and administrative arrangements, asking questions such as “To what extent is the CGAP–World Bank institutional arrangement supporting or hindering CGAP and World Bank’s visions, missions, and objectives relating to financial inclusion?” and “To what extent have CGAP and the World Bank paid sufficient and timely attention to developing a World Bank exit plan and strategy?”³²³ Evaluation indicators measured evidence of positive or negative impacts linked to institutional arrangements and the level of satisfaction expressed by stakeholders.

The scope of the feasibility study only allowed for a very preliminary exploration of hosting arrangements, and a more detailed study and analysis of the best arrangement will need to be undertaken if the decision is made to have another agency host the GBF.

4.3.6. Governance

In broad terms, governance models for international organizations tend to be of two kinds: the

“stakeholder” and “shareholder” models. In the former, a broad range of stakeholders, including recipient countries, civil society, and relevant multilateral organizations as well as donors, are represented on and have voting rights on the organization’s Board. Gavi, the GFATM, and the GPE all have Boards of this kind. In the shareholder model, the organization’s funders control the Board. This is largely the case for the World Bank and the IMF.

The shareholder governance model has been the norm for many new international development partnerships created in recent decades, and it can promote inclusion and confer greater legitimacy. However, it can also be cumbersome and inefficient. Further, a number of assessments have attributed weaknesses in the governance of some international partnerships, in part, to the stakeholder governance model.³²⁴

If the GBF is hosted by another institution, as we recommend, its governance arrangements would be subject to and circumscribed by the governance structures of the host organization. These arrangements could take a number of forms, however. Within the World Bank, for example, there are entities, including the GPE itself, with their own Boards and, at the other extreme, simple trust funds in which donors agree in advance to terms of use but have no ongoing voice. There is also a middle ground, exemplified by the Global Finance Facility and Power of Nutrition, in which donors remain closely involved in the choice of countries and other high-level decisions.

The appropriate governance model depends on whether the GBF is hosted by another organization and, if so, on how that organization is governed. For example, if the GBF were hosted by the GPE, it may make sense for the GBF to adopt a leaner model focused on donor input, as other stakeholders would already be represented on the GPE Board. The exact division of responsibility between the host organization’s structures and that of the GBF would have to be negotiated with any potential host.

³²³ Universalia. (2012). *CGAP Phase IV Mid-term Evaluation – Revised Report*.

³²⁴ Bezanson, K. A., and Isenman, P. (2012).

5. Further areas of exploration and analysis

The subsequent stage of work will refine and test the concept of the GBF. Based on our consultations, the following activities have emerged as potential activities for the subsequent stage of work. Some of the activities below will be undertaken by the R4D-IEP partnership in Phase 2 (February–June 2016). A high-level description of activities and areas is provided at this stage, and the timing and specifics of each will need to be further developed.

Fund concept development and refinement

1. Refine operational and governance structures

Based on the institutional structure ultimately decided for the GBF—specifically, whether it is established as a stand-alone body or hosted within an existing organization—the governance structure will need to be carefully developed and assessed through consultations with technical experts. Specifically, some of the questions that will need to be answered are:

- ▶ How can the autonomy of the GBF be maintained while simultaneously leveraging the built-in networks and channels of the host?
- ▶ How can the composition and responsibility of the Board and/or Secretariat be created to reflect inclusiveness and efficiency of decision making?
- ▶ How can mechanisms be created to ensure high-quality participation from all partners?

2. Refine the model for fund disbursement

As explored in Section 4.3.1, it is proposed that the GBF provide cash grants and fund technical

assistance to eligible countries in response to country proposals. However, a number of areas still need to be further explored around how this process will work in practice. Some of these issues are laid out in Section 4.3.1 and include how country proposals will be developed and submitted, eligibility criteria, appropriate results-based financing techniques, and coordination of GBF funding with other education support. The World Bank's REACH program could also further test the scope of RBF strategies within the book chain. Additionally, details on frequency of disbursement and policies on renewal proposals will also need to be decided in due course.

Political support and buy-in

3. Consultations to generate political buy-in for a new mechanism: It will be crucial to seek broader feedback and buy-in, both on the concept of the GBF and on its proposed activities. Extensive stakeholder consultations will be needed to obtain input from a representative mix of partners, including country-level policymakers and stakeholders. Strategic political mapping to understand the priorities and interests of key stakeholders and/or potential funders is also recommended. Opportunities to build political support, e.g. through the activities of the new International Commission on Financing Global Education Opportunity or through the G7, need to be explored, as does the fit with other international educational priorities such as helping educate refugees and the promotion of global citizenship.

Deeper analysis in a select number of areas

4. Further analysis on the feasibility and provision of reading materials to targeted populations

Our feasibility study did not focus on the specific needs of children in distinct contexts where the challenges may be severe and unique. For example, disabled children or those in fragile and conflict-affected areas face unique needs and challenges in accessing and using books. More analysis and exploration of particular populations is thus needed to better understand how the GBF could effectively support reading in such circumstances.

Test approaches

5. Test and explore specific approaches to demonstrate proof of concept: Conducting small-scale pilots in a select number of countries would be a valuable means to test and refine specific approaches that could be undertaken by a GBF. Indeed, the

RMNCH Trust Fund and the Global Financing Facility started with 8 and 4 frontrunner countries, respectively, highlighting the importance of first piloting with a small number of countries. This could entail testing both the proposed joint learning and knowledge dissemination functions as well as country-level activities. We recommend that careful attention be paid to the selection of representative countries to ensure diversity in country contexts and challenges. It will be important to achieve quick wins and successes to demonstrate the concept and need for a GBF; at the same time, testing specific components around funding and procurement in more challenging contexts (e.g., South Sudan, Haiti) will be important to refine the model. We also recommend collecting evidence of the impact of GBF activities and reading books provision during this phase to demonstrate its impact and value to policymakers and other stakeholders. The planning and design of pilots could be undertaken as part of Phase 2, with actual testing conducted as part of a GBF startup phase.

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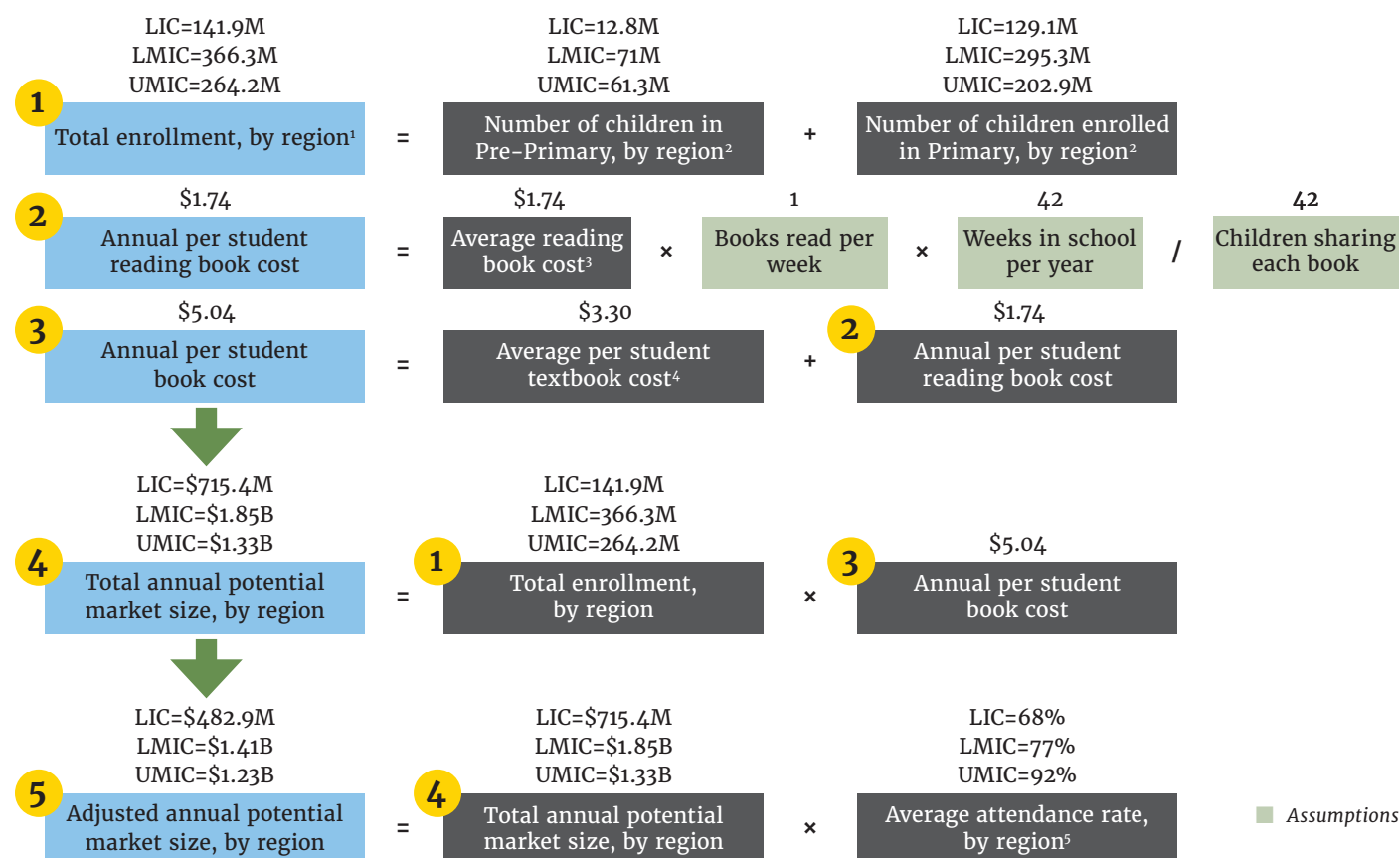
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7. Appendices

Appendix 1. Market sizing methodology.



1) Regions defined using the UIS classifications of low income, lower middle income, and upper middle income countries.

2) UNESCO. (2016b). UIS Database.

3) Estimated as US\$1.74, based on average reading book price reported in the Data for Education Research and Programming Survey, 2014.

4) Estimated as US\$3.30, based on Fredriksen, B., Brar, S., and Trucano, M. (2015).

5) UNESCO. (2016b). UIS Database.

Key assumption inputs to the model

Number of books read per child per week

- Children are assumed to be reading one new book each week for the duration of the school year. This is based on conversations with education experts regarding an “aspirational” target that ranged from one book per month to one book per day.

Number of children sharing each book

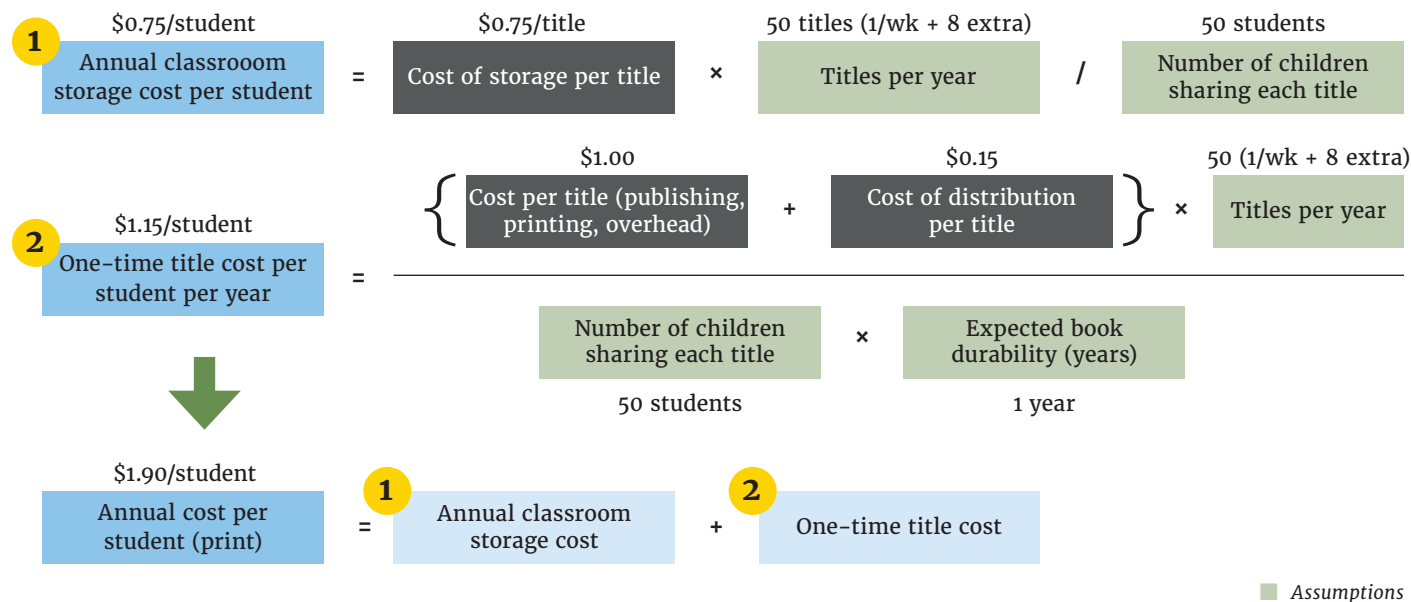
- It is assumed that there are 42 children per classroom and that each classroom of children would be sharing books. This was based on estimates from UNESCO that over half of first grade classrooms in sub-Saharan Africa have over 50 students and that this number decreases in older grades.

Number of weeks in school per year

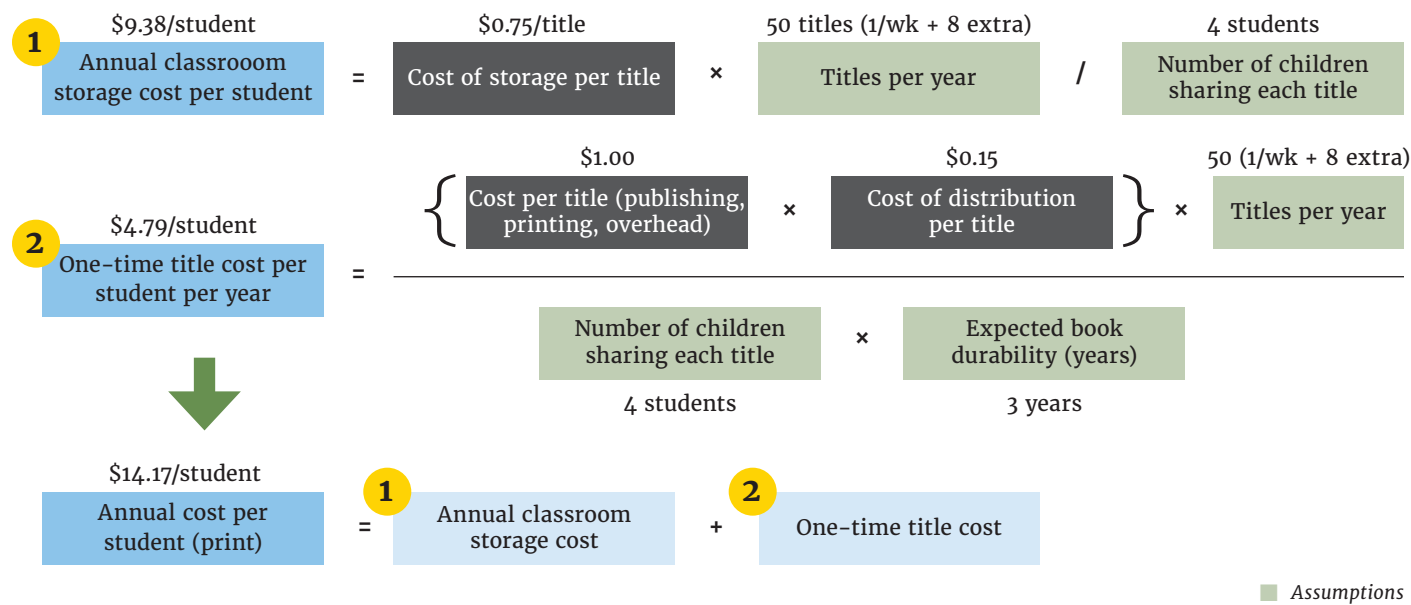
- Estimated based on a school year with ten weeks of vacation for summer and winter holidays

Appendix 2. Digital feasibility analysis– methodology and assumptions used to estimate annual per student cost of print materials

Methodology and assumptions used for print estimates—classroom sharing



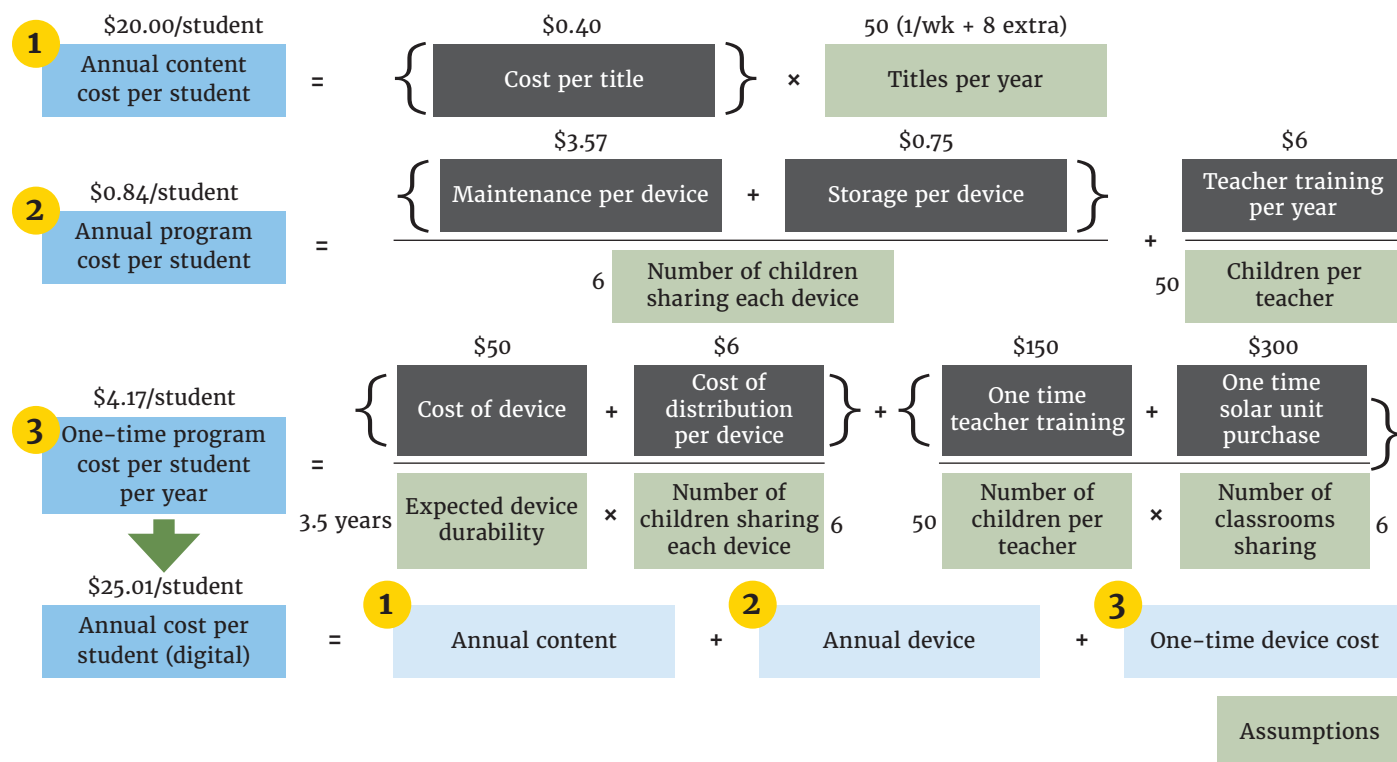
Methodology and assumptions used for print estimates—4 students sharing



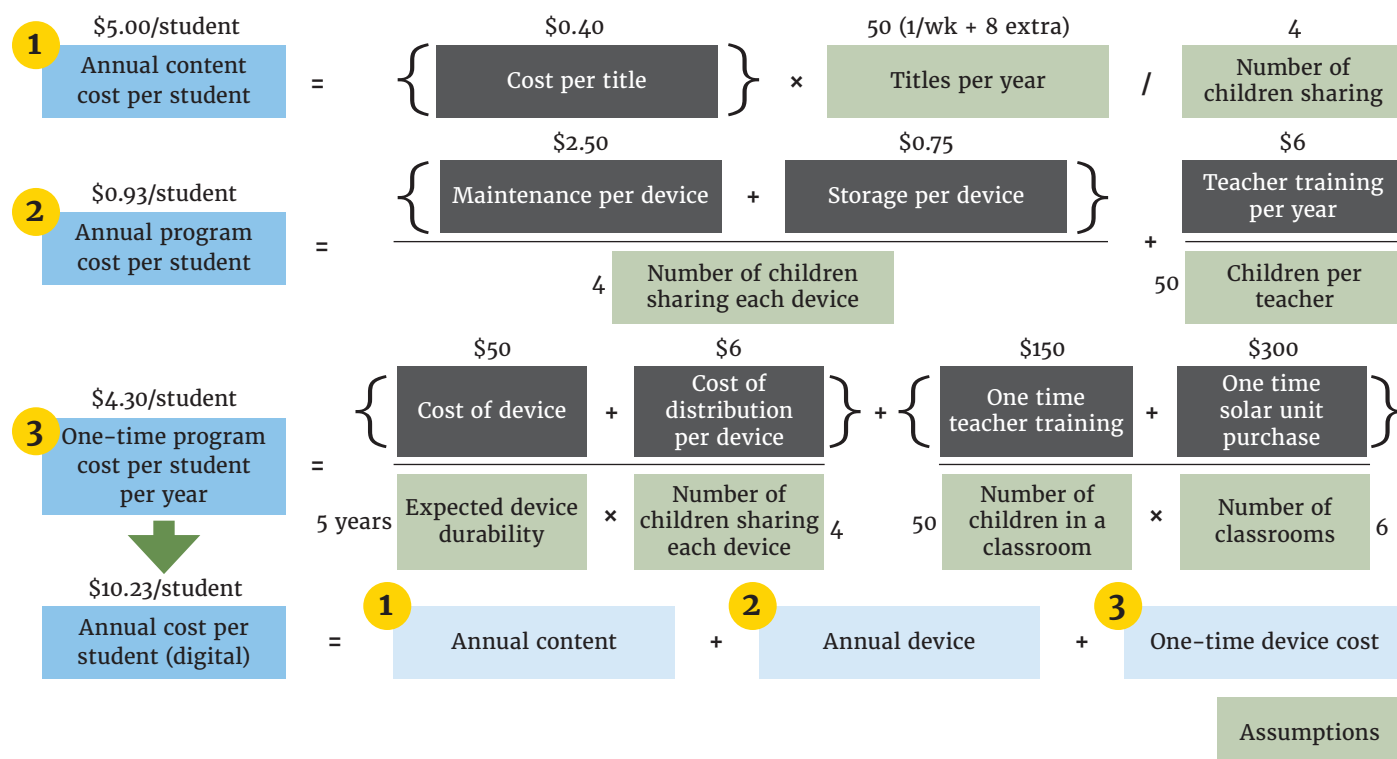
Cost Component	Estimates and Sources	Average used in model
Cost of storage per title	\$0.40—Worldreader, cost of wooden cabinet, amortized over lifetime of cabinet and number of devices stored (assumed same storage as digital) \$1.08—Bridge International Academies, cost of locked cabinet, amortized over lifetime of cabinet and number of devices stored	\$0.75
Cost per title	\$0.37—Pratham Books \$1.74—DERP study (RTI International. [2015])	\$1.00
Cost of distribution per title	Range from \$0.03 to \$0.22—BurdaDruck Range from \$0.06 to \$0.30—Pratham	\$0.15
Expected book durability	6 months—Kenya National Library Service (KNLS), heavy usage 2 years—KNLS, classroom usage 3 years—BurdaDruck 3-4—Tony Read (IEP), Birger Fredriksen (World Bank)	1 year for library sharing 3 years for classroom sharing
Number of children sharing each title	50—UNESCO median class size estimate	50 children

Appendix 3. Digital feasibility analysis– methodology and assumptions used to estimate annual per student cost of digital materials

Methodology and assumptions used for digital estimates—classroom sharing



Methodology and assumptions used for digital estimates—4 students sharing



Sources of assumptions for digital estimates³²⁵

Cost Component	Estimates and Sources	Average used in model
Cost per title	\$0.40—Worldreader	\$0.40
Maintenance per device	Moses (2002) article estimates 30–50% of device cost in maintenance over life of device 1% of device cost annually—Worldreader	25% of device cost over life of device (For library sharing, 1250 amortized over 3.5 years, and for classroom sharing, \$12.50)
Storage per device	\$0.40—Worldreader, cost of wooden cabinet, amortized over lifetime of cabinet and number of devices stored (assumed same storage as digital) \$1.08—Bridge International Academies, cost of locked cabinet, amortized over lifetime of cabinet and number of devices stored	\$0.75
Follow-up teacher training per year	\$6.00—Worldreader	\$6.00
Cost of device	\$50—Cost of e-readers, used by Worldreader (other devices, like tablets, may cost more)	\$50
Cost of distribution per device	\$6.00—Worldreader	\$6.00
One-time teacher training	\$150 per school site—Worldreader	\$150
One time solar unit purchase	\$300—Worldreader	\$300
Cost of device	\$50—Worldreader \$180—Tablets currently being procured by Beyond Access \$250—OLPC XO price quoted in Rwanda's ICT4E policy	\$50 (for the purposes of this model, we assumed students to use e-readers, the least expensive option)
Number of children sharing each reader	1 —Reported target ratio 4—Worldreader 15—Bridge Academies	6
Expected device durability	2—Beyond Access tablet 4.5—Worldreader 4 —Rwanda's ICT4E policy	3.5 years for library sharing, 5 years for classroom sharing
Number of children per teacher	50—UNESCO median class size estimate for primary school	50
Number of classrooms sharing devices	6—Worldreader (grades 1–6)	6

³²⁵ Several organizations implementing e-reading programs were not able to provide estimates of their maintenance costs due to lack of data. As such, these costs should be interpreted as fluid and with caution.

Appendix 4. Current Spending and Spending Need for TLMs

Country	Income level	Actual TLM spending (2010–2014 average)	Actual TLM spending as % of primary spending	Total cost for text and reading books (minimum standards)	Funding gap	Spending need as % of current primary spending, text and reading books*
Benin	LIC	\$ 5,666,736	3%	\$ 10,823,094	(5,156,358)	5.4%
Burkina Faso	LIC	\$ 11,687,712	4%	\$ 13,160,348	(1,472,637)	4.7%
Burundi	LIC	\$ 204,600	0%	\$ 10,384,068	(10,179,468)	15.5%
Central African Republic	LIC	\$ 7,213	0%	\$ 3,360,155	(3,352,942)	26.0%
Ethiopia	LIC	\$ 4,924,934	1%	\$ 79,820,154	(74,895,220)	18.8%
Guinea-Bissau	LIC	\$ 132,684	1%	\$ 1,414,902	(1,282,218)	13.2%
Malawi	LIC	\$ 3,867,763	5%	\$ 20,783,488	(16,915,726)	24.2%
Mali	LIC	\$ 6,159,229	4%	\$ 11,068,070	(4,908,842)	6.7%
Niger	LIC	\$ 9,381,957	5%	\$ 11,552,087	(2,170,129)	6.4%
Togo	LIC	\$ 795,486	1%	\$ 7,169,675	(6,374,189)	7.1%
Uganda	LIC	\$ 6,887,838	3%	\$ 42,917,031	(36,029,193)	15.8%
Armenia	LMIC	\$ 1,223,928	2%	\$ 723,036	500,892	1.1%
Cabo Verde	LMIC	\$ 60,235	0%	\$ 340,030	(279,795)	0.9%
Cameroon	LMIC	\$ 8,906,726	3%	\$ 21,017,679	(12,110,953)	7.7%
Congo, Rep.	LMIC	\$ 1,973,402	1%	\$ 3,726,328	(1,752,926)	1.5%
Cote d'Ivoire	LMIC	\$ 26,066,847	5%	\$ 16,117,341	9,949,507	2.8% [^]
Ghana	LMIC	\$ 12,068,073	1%	\$ 22,030,011	(9,961,939)	2.4%
Guatemala	LMIC	\$ 39,827,710	5%	\$ 12,264,423	27,563,287	1.6%
Honduras	LMIC	\$ 797,767	0%	\$ 5,834,546	(5,036,779)	1.1%
Vietnam	LMIC	\$ 233,129,659	8%	\$ 37,719,462	195,410,197	1.3%
Yemen, Rep.	LMIC	\$ 29,078,324	3%	\$ 19,657,853	9,420,472	2.2%
Colombia	UMIC	\$ 172,842,956	3%	\$ 23,046,347	149,796,609	0.4%
Cuba	UMIC	\$ 17,831,500	1%	\$ 3,872,800	13,958,699	0.2%
Dominican Republic	UMIC	\$ 12,021,952	1%	\$ 6,432,632	5,589,320	0.8%
Ecuador	UMIC	\$ 85,256,159	3%	\$ 10,489,345	74,766,814	0.3%
Kazakhstan	UMIC	\$ 1,319,677	3%	\$ 6,067,844	(4,748,167)	12.4%
Mauritius	UMIC	\$ 946,888	1%	\$ 534,968	411,920	0.5%
Mongolia	UMIC	\$ 3,426,080	2%	\$ 1,213,993	2,212,087	0.9%
Namibia	UMIC	\$ 86,145	0%	\$ 2,157,394	(2,071,250)	0.6%
Paraguay	UMIC	\$ 12,326,558	3%	\$ 4,252,458	8,074,100	1.1%
Peru	UMIC	\$ 53,343,737	2%	\$ 17,734,415	35,609,322	0.8%
South Africa	UMIC	\$ 192,533,303	2%	\$ 36,503,562	156,029,742	0.4%
Grand total		\$ 954,783,776		\$ 464,189,539	490,594,237	
Median			2%			1.9%
Average			2%			5.77%

Appendix 5. Criteria for considering institutional options for the GBF

Two institutional options were considered for a GBF: (1) a freestanding GBF and (2) a GBF hosted by a major education multilateral or global partnership. Each option was analyzed across specific objectives and criteria in order to identify which institutional arrangement best aligns cost-effectiveness with GBF's assumed goals and processes.

Rating System

The table below presents analysis of the major strengths and weaknesses for each option. Each cell displays a rating of 0 to 2 stars. Ratings go from poor alignment, zero stars, to high alignment, two stars. Notes are included below specific options to supplement ratings. The option with the highest ratings total is considered as the institutional arrangement most suitable for a GBF mechanism.

Objective or other criteria	Freestanding GBF Option	Hosted GBF Option
1. Increasing effective use and learning outcomes	A new freestanding GBF could have difficulty integrating with other education initiatives that seek to improve learning. An independent GBF is not going to have the clout of a GFATM or Gavi.	** This option could lead to better outcomes by assuring GBF activities are integrated within the host organization and other education multilaterals' broader education initiatives such as curriculum development and teacher training.
2. Reducing costs of books (assumes subsidization by GBF according to country need)	**	**
3. Increasing physical distribution of books	**	** GBF can use existing accountability systems from the host to try to reduce losses in physical distribution.
4. Innovation and use of innovative financing techniques (if we decide a fund should allow for this)	** A freestanding GBF can be nimble and flexible to support innovative schemes, perhaps through a challenge fund, at country level (although at the expense of integration and sustainability).	* A GBF with its own specialized secretariat could still provide a "window" to a challenge fund within a host organization.
5. Intensity of focus on SRM/books	** An independent GBF with its own vision and goals can prioritize entirely on books.	* A GBF would have its own dedicated focus on books, but it would need to be integrated as part of the host organization's broader objectives.

Objective or other criteria	Freestanding GBF Option	Hosted GBF Option
6. Aid effectiveness and consistency with Paris/Accra/Busan principles	<p>A new freestanding institution with its own funding channel could complicate donor coordination at country level.</p> <p>The Accra Agenda states: “As new global challenges emerge, donors will ensure that existing channels for aid delivery are used and, if necessary, strengthened before creating separate new channels that risk further fragmentation and complicate co-ordination at country level.”</p>	<p>*</p> <p>Aid effectiveness principles can be adhered to if the strength of the case for a GBF is cost-effective in increasing learning, as compared to current practices by donors and countries.</p>
7. Raising additional funding for education	<p>Very unlikely. Donors will still analyze their overall spending/contribution to education. A freestanding GBF will unlikely have the same political impetus for additional financing as in cases of CSOs, GFATM, or Gavi.</p>	<p>Even more unlikely, although a GBF hosted by a multilateral might be able to access non-education bilateral funds, which could bring in additional resources to education.</p>
8. Raising additional funding for SRM / books (external and domestic)	<p>**</p> <p>A freestanding GBF could attract additional funding from funders focused on the physical supply of books. However, an independent GBF would have less ‘voice’ to get credible commitments for government financing.</p>	<p>**</p> <p>This GBF option would be ideal for funders focusing on addressing issues of use, accountability, and increasing government financing.</p>
9. Sustainability	<p>*</p> <p>Freestanding institutions hardly ever abolish but may lack integration with other actors, which increases the odds of getting sidelined and can run the risk of reduced funding over time.</p> <p>This option would force a GBF to spend more time on mobilizing funds rather than focus on programming.</p>	<p>**</p> <p>A GBF can be better integrated as part of an existing institution with ongoing programs, processes, and support structures.</p>
10. Flexibility in use of multiple intermediaries	<p>*</p> <p>In principle, this option tends to give no preference to intermediaries. However, there is an increased likelihood of mission creep to occur in this option.</p>	<p>*</p> <p>It is feasible that a hosted GBF could still choose the most qualified intermediaries. However, there is tendency to use host institutions as default intermediaries (e.g., the early case of GPE selecting the World Bank as supervising entity).</p>

Objective or other criteria	Freestanding GBF Option	Hosted GBF Option
11. Review of country proposals	Combining necessary country and specialized expertise will be difficult and costly for a freestanding GBF. Organizations such as GPE & GFATM show the need for external review.	** Review of country proposals could be integrated within the host's proposal review process and supplemented by an expert GBF secretariat in books/reading.
12. M&E and accountability	* In this option, a GBF would need to initiate and structure an entirely new M&E / accountability unit.	** This option has the advantage of using an M&E and accountability structure that is already in place, even if it hampers flexibility.
13. Repository of books	** A freestanding GBF could pay more attention to repository functions. However, this function would be covered better and more sustainably by libraries.	*
14. Effective buy-in coordination of relevant stakeholders.	* There is more flexibility in this freestanding option but has far less convening power and influence.	** This option can provide a GBF more voice through existing (financial) coordination structures, such as the LEG in GPE for example.
15. Coverage of middle income countries.	** This option allows a GBF to independently decide its coverage.	* This option would require GBF to gain agreement with the host's governance structure to go beyond its usual country coverage.
16. Cost and capacity	It is more expensive to run an independent organization and to reproduce the needed complementary non-book capacity.	** There is less marginal cost as a GBF could use existing capacity. However, the tradeoff between lower marginal cost in dealing with procurement within existing institution and increased flexibility in being an independent fund must be appropriately analyzed.
17. Transaction costs (how easy would it be for countries to access funds)	Countries would have to follow separate GBF proposal review and disbursement procedures.	* Countries have the benefit of institutional knowledge of host organization's disbursement procedures.

Objective or other criteria	Freestanding GBF Option	Hosted GBF Option
18. Provisions books in humanitarian situations	<p style="text-align: center;">**</p> <p>This option allows a GBF to independently decide its mandate.</p>	<p style="text-align: center;">*</p> <p>This option would require GBF to gain agreement with the host's governance structure to go beyond usual country coverage.</p>
19. Formal arrangements or MOUs with other relevant organizations (e.g., IDA, UNICEF)	<p style="text-align: center;">*</p> <p>There is more autonomy in this freestanding option, which allows a GBF to pursue formal arrangements with relevant organizations. However, an independent GBF would have far less convening power and influence.</p>	<p style="text-align: center;">**</p> <p>This option can provide a GBF more clout to form arrangements with other organizations. However, bureaucratic hurdles might delay agreements.</p>
Total rating	23	29

Annex 1. Country Stakeholder List

Country	Organization	Name
Publishers		
Bangladesh	Adi Ganto	Mustak Raihan
	Book Trade Market	
	Hakkani Publishers / Parama Publishers	Golam Mustafa
	Hakkani Publishers / Parama Publishers	Mahammudunnaby Robin
	Mullick Brothers	Shahidul Hasan Mullick
	Panjaeree Publications Ltd.	Sunil Kumar Dhar
	Panjaeree Publications Ltd.	Neloy Nandi
	University Press Ltd.	Mohiuddin Ahmed
Ethiopia	University Press Ltd.	Badiuddin Nazir
	Publisher	Anonymity requested
Haiti	Publisher	Anonymity requested
	Communication Plus	Anais Chavenet
	Editions Henri Deschamps	Maël Fouchard
	Editions Henri Deschamps	Peter Frisch
	Editions Zemes Haiti	Charles Tardieu
	Educa Vision	Féquiere Vilsaint
	Kopivit L'Action Sociale	Gerard-Marie Tardieu
	La Pleiade	Monique Lafontant
India	Université Caraïbes	Jocelyne Trouillot-Levi
	Academic Publisher	Bimal Dhar
	Dev Sahitya Kutir	Rajarshi Majumdar
	Sahitya Bharati	Siddarth Beri
Kenya	Sishu Sahitaya Samsad	Debojoyti Datta
	Longhorn Publishers	Geoffrey Gichuki
	Moran Publishers	Naima Kassim
	Mountain Top Publishers	Lawrence Njagi
Niger	Phoenix Publishers	John Mwazemba
	Éditions Afrique-Lecture	Chérif Lawan
	Éditions Alpha	Issoufi Alzouma Oumarou
	Éditions Gama-Gari (GG)	Abdou Mijinguini
Nigeria	Éditions Gashingo	Malam Abdou Bako
	A. Joji Publishers	Adamu M. Yusuf
	Aqua Green Limited	Tunde Tijani
	Evans Brothers Limited	Dauda Lukman
	Fidan Publishing Co. Ltd.	Malam Aminu Tafida
	HEBN	Olawepo Sogo

Country	Organization	Name
	Learn Africa Limited	Gbola Ayedun
	Learn Africa Limited	Segun Oladipo
	Learn Africa Limited	Bello S. Olajumoke Akanmu
	Liframed Publications Ltd.	Bello S. Olajumoke
	NNPC	Mahmud B. Bambale
	University Press Plc.	Olajide Jegede
	West African Book Publishers	Hyacinth Egbulem
Pakistan	Oxford University Press	Ameena Sayiid
	Oxford University Press	Raheela Faheem Baqai
	Oxford University Press	Kashif Ahmed
	Pakistan Publishers and Booksellers Association	Khalid Aziz
	Star Educational Publishers	Aabdul Rehman Sheikh
Philippines	Adarna House	Ani Rosa S. Almario
	Anvil Publishing	Karina A. Bolasco
	Lampara Publishing House	Segundo Matias, Jr.
	OMF Literature	Yna S. Reyes
	Rex Book Store	Sam D. Baltazar
	Tahanan Books	Frances Ong
	Vibal Group	Kristine Mandigma
Rwanda	Kibondo Editions	Munyurangabo Jean de Dieu
Tanzania	Aidan Publishers	Leila Mirola
	Kwanza Publishers	Lipangala Minzi
	Mangrove Publishers	William Mkufya
Uganda	East African Educational Publishers	
	MK Publishers Ltd.	
	Netmedia Publishers	
Printers		
Bangladesh	Letter n Colour Ltd.	Anup Kumar De
Haiti	Imprimerie Deschamps	Chantal Guillioud
	Imprimerie Eglise Méthodiste	Edzaire Paul
India	Anderson Printers	Tarun Mandal
	CDC Printers	Raju Shaw
	Gopsons	Sunil Goel
	S P Communications Pvt. Ltd.	Prasun Bhuit
Kenya	The English Press	Kalpan Patel
Niger	Imprimerie Albarka	Tahirou Mazou
	Imprimerie N.T.I Sarl	Nabazaga Tawaye
Nigeria	Academy Press Plc.	John A. Oluyemi
	Clear Impressions Ltd.	Iro Ibrahim Yahya
	Daily Trust Press	Abdulahi M. Ladan
	Daybis Press Ltd.	Oladayo Popoola
	Jexcel Commercial and Security Printers	M. A. Williams-Egbah

Country	Organization	Name
Pakistan	Sindica Academy Printers and Publishers	Noor Ahmed Memon
Philippines	Book Media Press	Benito J. Brizuela
	Rex Printing	Timothy I. Buhain
	Vibal Group	John S. Bellen
	The House Printers	Joey A. San Juan
Rwanda	Multicom	Kagabo Julien
Donors		
Ethiopia	World Bank – Ethiopia General Education Quality Improvement Project II	Anonymity requested
Haiti	UNICEF Haiti	Beatrice Malbranche
	USAID Haiti	Fabiola Lopez-Minatchy
Kenya	DFID Kenya	Lilian Gangla
	USAID Kenya	
Niger	Agence Française de Développement (AFD)	Cynthia Mela
	UNICEF Niger	Sharmila Pillai
	World Bank – Niger	Adama Ouédraogo
Nigeria	DFID Nigeria	Esohe Eigbike
	UNICEF Nigeria, Abuja	Heinrich Rukundo
	UNICEF Nigeria, Abuja	N. Lawal
	UNICEF Nigeria, Abuja	Charles Avelino
	USAID Nigeria	Timothy Curtin
Pakistan	Agha Khan Foundation	Ghulam Issa Khan
	DFID Pakistan	
Philippines	Asian Development Bank	Lynette C. Perez
	World Bank – Philippines	Samer Al-Samarral
	USAID Philippines	Brian S. Levey
Rwanda	DFID Rwanda	Paul Atherton
	UNICEF Rwanda	Erin Tanner
South Sudan	DFID South Sudan	Richard Arden
	UNESCO South Sudan	Abdhi Dohir Osman
	UNICEF South Sudan	Tizie Maphalala
	USAID South Sudan	Christine Djondo
Uganda	Global Partnership for Education	
NGOs / Implementers		
Bangladesh	BRAC	Prafulla Kumar Barman
	Campaign for Popular Education (CAMPE)	Tapon Kumar Das
	Dhaka Ahsania Mission	Ehsanur Rahman
	Dhaka Ahsania Mission	Kazi Ali Reza
	Gano Shahajjo Sangstha	Nishat Jahan Rana
Ethiopia	SIL International – Ethiopia	Anonymity requested

Country	Organization	Name
	SIL International – Ethiopia	Anonymity requested
	SIL International – Ethiopia	Anonymity requested
Haiti	A Connected Planet	Greg Hearn
	CARE Haiti (Partners in Education)	Monique Manigat
	Fondation Tipa Tipa	Dominique Hudicourt
	Knowledge and Freedom Foundation (FOKAL)	Elizabethe Pierre-Louis
	Library for All	Françoise Thybulle
	Library for All	Rico Mondesir
India	All India Council for Mass Education and Development	Rajashree Biswas
	All India Council for Mass Education and Development	Dilip Mukhopadhyay
	Communication and Media People	Gautam Bose
	Pratham Foundation	Animesh Chatterjee
Kenya	Centre for British Teachers (CFBT)	Mark Rotich
	Worldreader	Joan Mwachi Amolo
Niger	Niger Education and Community Strengthening (NECS) Project	Ali Amadou
	VIE Kande Ni Bayra	Abdoulaye Ali
Nigeria	British Council	Louisa Waddington
	Reading Awareness Society for Development	Bukola Ladoja
	RTI International	R. Drake Warrick
Philippines	Basa Pilipinas, Education Development Center	Marcial A. Salvatierra
	Save the Children	Abigail C. Castillo
Rwanda	Rwandan Children's Book Initiative, Save the Children	Sofia Cozzolino
South Sudan	Save The Children	Lizzie Rushwaya
	Save The Children	Julie Finder
	War Child Holland	
	Windle Trust	Peter Ale
Tanzania	Children's Book Project	Marcus Mbigili
	Room to Read	Prisca Mdee

Government Agencies / Policymakers

Bangladesh	Bangladesh Sishu (Children) Academy	Mosharrof Hossain
	Bangladesh Sishu (Children) Academy	Razian Akhter
	Department of Public Libraries, Ministry of Cultural Affairs	Nikhil Sarkar
	Department of Public Libraries, Ministry of Cultural Affairs	Ashish Kumar Sarkar
	Department of Public Libraries, Ministry of Cultural Affairs	Harunor Rashid
	Department of Information and Library Management, University of Dhaka	Muhammad Mezbah-ul-Islam
	Department of Information and Library Management, University of Dhaka	M. Nasiruddin Munshi
	Directorate of Primary Education	Alauddin al Azad
	Directorate of Primary Education	Mahfuzur Rahman Jewel
	Directorate of Primary Education	Fazle Siddique Md Yahya

Country	Organization	Name
	Directorate of Primary Education	
	Directorate of Primary Education	Shams Uddin Ahmed
	Ministry of Cultural Affairs	Muhammad Hamidur Rahman (Tushar)
	National Curriculum and Textbook Board	Imrul Hasan
	National Curriculum and Textbook Board	Mustaq Ahmed Bhuiyan
Ethiopia	Ministry of Education – National Assessments	Anonymity requested
Haiti	Akademi Kreyol Ayisyen	Luna Gourage
	Direction Nationale du Livre	Frantz Carly Jean Michel
	Ministry Of Education and Professional Training	Marie Yolaine Vandal
	Ministry Of Education and Professional Training	Pierre Cenatus
	Ministry Of Education and Professional Training	Chantal Roques
	Ministry Of Education and Professional Training	Volvick Charles
India	British Council	Indrani Bhattacharya
	Ministry of Education, West Bengal	Arnab Roy
	National Library	Parthasrathi Das
	Primary Education Board, Birbhum District, West Bengal	Raja Ghosh
	State Central Library	Abhijit Bhowmick
Kenya	Department of Culture: Libraries	Stephen Mau
	Kenya National Library Service	Richard Atuti
	Ministry of Education (MOEST)	Leah Rotich
	Ministry of Education (MOEST)	Onesmus Kiminza
	Ministry of Education (MOEST) – Tusome Project	Margaret Murage
Niger	Association des auteurs nigériens en langues nationales (ASAUNIL)	Abdoua Ouma
	de la Promotion des langues nationales et de l'Éducation civique	Mallam Garba Maman
	Direction de l'Alphabétisation et de l'Éducation non formelle (DGAENF)	Dandi Adamou
	Direction des Marchés publics et des Délégations de Service public	Yacouba Souley
	Direction du Curriculum et de la Réforme de l'Enseignement (DCRE)	Roua Boukar
	ÉLAN de Madina 3	Namata Rokayatou
	Institut National de Documentation, Recherche et d'Animation Pédagogiques (INDRAP)	Elghamis Ramada
	Ministère de la Culture	Maï Moustapha
	Ministère de la Culture	Oumarou Amadou
	Ministère des Enseignements Secondaires	Mahamadou Habibou
	Service de l'éducation préscolaire	Souley Rabi
	Service de la promotion de l'informatique	Sabiou Arzika
	Systèmes alternatifs d'alphabétisation, responsable caractères coraniques harmonisés (AJAMI)	Nourou Abdourahmane
Pakistan	District Education Office, Hyderabad District	Akber Memon

Country	Organization	Name
	Education and Literacy Department, Sindh	Fazlullah Pechooho
	Library Khairpur Mir's Ministry of Culture	Sachal Sarmast
	Ministry of Culture	Niaz Ali Abbasi
	Shamsul Ulema Daudpoto Library, Hyderabad	Aisha Baloch
	Sindh Education Management System (Semis), Reform Support Unit, MOE	Zahid Jatoi
	Sindh Teachers' Education Development Authority	Abdul Majeed Bhurt
	Sindh Textbook Board	Syed Zakir Shah
Philippines	Department of Education (DepEd)	Armin A. Lustro
	Department of Education (DepEd)	Beverly Gonda-Berame
	EMIS Division, DepEd	Marieta C. Atienza
	Instructional Materials Council Secretariat, DepEd	Edel B. Carag
	National Book Development Board	Graciela M. Cayton
	National Library of the Philippines	Sharisse Lim
	Partnerships and External Linkages, DepEd	Mario A. Deriquito
	Programs and Projects, DepEd	Dina S. Ocampo
Rwanda	Rwanda Education Board	Joyce Musabe
	Rwanda Education Board	Augustin Gatera
South Sudan	Ministry of Culture, Youth and Sport	Agum Ria Mabeng
	Ministry of Education, Science and Technology	Michael Lopuke Lotyam
Tanzania	Ministry of Culture – Tanzania Library Services Board	Lusekelo Mwaghelo
	Ministry of Culture – Tanzania Library Services Board	Alli Mcharazo
	Ministry of Education and Vocational Training	C. Mgimba
	Ministry of Education and Vocational Training	Khadija Mcheti
Uganda	Department of Teacher Education	
	Education Planning Department, Ministry of Education, Science, Technology, and Sports	
	Instructional Materials Unit, Ministry of Education, Science, Technology, and Sports	
	Ministry of Gender Labour and Social Development	
	National Curriculum Development Centre	
	National Library of Uganda	

Schools		
Bangladesh	Chittagong Medical College Hospital Model Primary School	Kazi Ayesha Akhter
	Chittagong Medical College Hospital Model Primary School	Tapan Kumar Chowdhury
	District Primary Education Board	Hrishikesh Shil
	Government Primary School	Kazi Sultane Shaheen
	Jaidevpur Primary Teachers Training Institute	Mhd Mizan Ur Rahman
	Jaidevpur Primary Teachers Training Institute	Dilruba Begum
	Khan Saheb Balak (Boys) Government Primary School	Nafiza Begum
	Postakar Government Girls Primary School	Sukriti Das

Country	Organization	Name
	Sher-e-Bangla Nagar Government Girls High School	Nazmun Nahar Shaheen
Haiti	College Adventiste de Petion-Ville	Herby Jean Baptiste
	Ecole Acacia	Caroline Hudicourt
	Ecole Nationale de Freres	
	EFACAP de Kenscoff	Edgard Bernardeau
	EFACAP de Kenscoff	Patrick Jean-Jacques
	Lekol Kominote Matenwa	Chris Low
India	Binuria Nimnabuniyadi Vidyalaya	Sukla Bhattacharya
	Gokhale Memorial Girls School	Sanghamitra Mukherjee
	Model Kindergarten	D. L. Sarkar
	Panindranath Kindergarten House	Indranil Mukherjee
	Rishi Aurobindo School	Arjun Ghosh
Kenya	Karen Academy	
	Racecourse Primary School	Anne W Atsyaya
	Total Care Academy	Anne Kamau
	Waguthu Primary School	Margaret Kimani
Nigeria	Kawo/Ungwar Gaya Primary School	
	Racecourse Model School	
	UMC Demonstration School	
Pakistan	Educators Primary School, Qasimabad District, Hyderabad	
	Government Primary School, Bahawal Zaunr District, Hyderabad	
	Government Primary School, Gharibabad District, Sukkur	
	Government Primary School, Mori Mangar District, Hyderabad	
	Government Primary School, Naya Madarsah Nawabshah, District Shaheed Benazirabad	
	Government Primary School, Wanki Wasi District, Hyderabad	
	Gul Ursani Primary School	
Rwanda	EP Gisozi II	Mukangemanyi Mamille
	GS Runda Isonga	Emmanuel Munyaneza
	GS Runda Isonga	Niyonzima Philippe
South Sudan	Primary school	
	Primary school	
Tanzania	Boko Primary School	
	Kisiju Pwani Primary School	Msahan Joffrey
	Maktaba Primary School	Job Ndugusa
	Mtambani Primary school	Neema Mushi
Uganda	Hashya Primary School	
	Ntinda Primary School	
Distributor / Bookseller		

Country	Organization	Name
Kenya	eKitabu	Will Clurman
	Laxmi Booksellers	Harish Vekaria
	Textbook Centre	Suleiman Gakuria
Niger	L'Association des libraires du Niger	Hawa Sankarani
	Librairie Burama	Georges Bebert
	Librairie La Farandole des livres	Binta Tini
Nigeria	Havilah Merchants Ltd.	Dare Oluwatuyi
	The Booksellers	Kolade Mosuro
	Zamani Books and Stationery Stores	Benard M. Ogbodobri
Pakistan	New Khairpur Book Store	Aabdul Samad Sheikh
Rwanda	Drakkar Ltd.	Lydie Hakizimana
South Sudan	Leaves Bookshop	Awak Bios
	Speedag Interfreight	
Tanzania	General Booksellers	Sungura Sadallah
Other		
Philippines	Philippine Educational Publishers Association	Dominador D. Buhain
	Philippine Board on Books for Young People	Tarie Sabido
	Zuellig School of Development Management, Asian Institute of Management	Juan Miguel M. Luz
South Sudan	Charles Kendall and Partners	Charles Bayley
	Charles Kendall and Partners	Keith Burchell
	Montrose International	Martin Prew
	Montrose International	Janice Moore
	Montrose International	Elizabeth Onyanga
Uganda	Summer Institute of Linguistics	Tanya Spronk
	Education Development Partners	
	Uganda Booksellers Association	
	Uganda Publishers Association	

Notes:

Blank indicates full name not provided

Italics indicate that the specific name of the institution/organization is not provided and/or available

Annex 2. Global Stakeholder List

Organization	Name
Broad experts	
Association for Development of Education in Africa (ADEA)	Aliou Sow
Bill and Melinda Gates Foundation	Darren Hoerner
Blue Tree Group	Maggie de Jongh
Blue Tree Group	Roel de Haas
DFID	Ed Barnett
DFID	Katrina Stringer
Florida State University	Helen Boyle
GPE	Karen Mundy
GPE	Alice Albright
Kenya National Libraries Association	Richard Atuti
Neil Butcher & Associates	Neil Butcher
Norad	Elin Ruud
RTI International	Karon Harden
RTI International	Anna Dick
RTI International	Ana Robledo
RTI International	Chelsea Lehman
RTI International	Michelle Ward-Brent
RTI International	Jessica Mejia
RTI International	Luis Crouch
UNESCO	Jordan Naidoo
UNICEF	Jo Bourne
UNICEF	Rosangela Berman Bieler
USAID	Penelope Bender
World Bank	Mamadou Mansour Mbaye
World Bank	Michael Trucano
World Bank	Carlos Rossel
World Bank	Richard Crabbe
World Bank	Amit Dar
Experts in funds	
Bill and Melinda Gates Foundation	Geoff Lamb
Center for Global Development	Owen Barder
DFID	James Droop
Hewlett Foundation	Ruth Levine
IFAD	Kevin Cleaver
University of Michigan	Prashant Yadav

Organization	Name
Implementers	
Africa Storybook Project	Judith Baker
Benetech	Terry Jenna
Benetech	Robin Seaman
Beyond Access	Matej Novak
Bridge International Academies	Geordie Brackin
Bridge International Academies	Lisa Chen
CODE	Scott Walter
CODE	Charles Temple
CODE-Ethiopia	Alemu Abebe
eKitabu	Matthew Utterback
Electronic Information for Libraries	Ramuné Petuchovaitė
Library for All	Isabel Sheinman
Library for All	Georgia Tyndale
Nal'ibali	Carole Bloch
Pratham Books	Purvi Shah
ProVisi Education	Robbi Cahjadi
Room to Read	Alisha Berger
RTI International Kenya	Ben Piper
Save the Children	Joseph Nhan-O'Reilly
The Asia Foundation	Melody Zavala
The Asia Foundation	Kyle Barker
Triumph Learning	Jieun Choe
Worldreader	Zev Lowe
Worldreader	Tina Tam
Worldreader	Danielle Zacarias
Printers	
Burda Druck	Cristophe Barth
India-based international printer	Anonymity requested
India-based international printer	Anonymity requested
India-based international printer	Anonymity requested
Paperight	Arthur Attwell
Publishers	
Kenya Publishers Association/WordAlive Publishers	David Waweru
One Moore Book	Wayétu Moore
Pearson Publishing	Amanda Gardiner
Pearson Publishing	Hanne Brown
Pearson Publishing	Alexander Moore
Scholastic International	Carol Sakoian

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BANGLADESH

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1. Methodology

The Bangladesh country study was conducted by Subrata Bhattacharya, consultant for International Education Partners (IEP), over the course of October 2015 – January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, as well as to assess the feasibility of a potential Global Book Fund.

The country background and context research for this study were conducted in the UK by IEP. In-country interviews were conducted in Dhaka and Chittagong by Subrata Bhattacharya and included representatives of all the main stakeholders in the book value chain, both public and private, including urban and rural government and private primary schools, project implementers, publishers, printers, booksellers, donors, non-governmental organizations (NGOs), the Ministry of Education (MOE), the Ministry of Culture (MOC), etc.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background

In 1971, Bangladesh gained independence from Pakistan. It is thought that national language policies and issues were significant contributing factors to this war.¹ In 1991, the first ever democratic elections were held, according to the CIA World Factbook 2015, and in the past two decades the country's economy

has grown at over 6% per year. Bangladesh is 148,460 square kilometres in area and borders with India and Burma, as shown in Figure 1. The estimated population in 2015 was approximately 169 million, with the majority (70.6%) living in rural areas and 29.4% living in towns and cities.²

The UNESCO Institute for Statistics puts the average national population density as one of the highest in the world at 1,007/km², and the primary language, spoken by 98.8% of the population, is Bangla (Bengali). The adult literacy rate in Bangladesh is 61.5%.³ There is a clear gender gap in literacy, with male literacy at 94.6% and female literacy at 58.5%.⁴

According to the World Bank, average per capita income had grown to US\$1,086.80 in 2014, and this further increased to US\$1,314 in 2015. As a result, Bangladesh has now become one of the lower middle income group of countries since 2015.

According to a report undertaken by the Brookings Institute,⁵ after two decades of growth Bangladesh has lowered the child mortality rate and reduced the number of people living in poverty. As a result, Bangladesh is now ranked as one of the highest improvers on the United Nations' Human Development Index.⁶ The Brookings Institute report finds that the reason for the expansion in access to primary education during the past two decades is due to strong national policies and effective education programs and notes that in 1990, just over two-thirds of its primary-age children were enrolled in primary school, while in 2016 there is near-universal primary education enrollment. It also notes that gains in girls' education have been particularly striking, and today, there are more girls in primary schools than boys.⁷

However, the Brookings Institute finds that improved access to primary education has not translated into

¹ CIA. (2015). World Factbook.

² Ibid.

³ Defined by the CIA World Factbook as *age 15 and over who can read and write a recognized language*.

⁴ UNESCO. (2016). UIS Database.

⁵ Steer, L., Rabbani, F., and Parker, A. (2014). *Primary Education Finance for Equity and Quality: An Analysis of Past Success and Future Options in Bangladesh*. Brooke Shearer Working Paper Series. Brookings Institute.

⁶ United Nations Development Programme. (n.d.). Human Development Index. Retrieved from <http://hdr.undp.org/en/content/human-development-index-hdi>

⁷ Steer, L., Rabbani, F., and Parker, A. (2014).

better overall education outcomes, and inequities continue to exist. The average dropout rate from government schools was down to 20.9% in 2014, according to the 2014 Annual Primary School Census, yet more children were enrolling in school. Some marginal areas, e.g. Jamalpur, Kishoreganj, Netrokana, Bhola, and Goibandha recorded average dropout rates above 35%, and in nearly two-thirds of all upazilas (sub-districts) dropout rates were over 30%. As is usual, poor areas scored worse than rich areas. Consistent learning outcome data across upazilas do not exist, but the National Student Assessment confirms significant gaps between poorer and wealthier students in terms of learning achievements for Bangla language instruction and mathematics. Underlying these persistent disparities in education outcomes are inequities in accessibility, infrastructure, facilities, and teaching inputs.⁸

Figure 1: Bangladesh administrative regions



2.2 Education System

Bangladesh has a centralized education system administered by the MOE and the Ministry of Primary and Mass Education (MoPME). The MoPME and the Directorate of Primary Education (DPE) are responsible for the planning and management of primary, mass, and pre-primary education. The Bureau of Non-Formal Education (BNFE) also provides vocational studies such as agriculture, technology, poultry-keeping, housekeeping, welding, care-giving, and cookery, in addition to the basic subjects of Bangla languages teaching, English, Mathematics, and general studies.

All primary schools fall into one of the categories below:

- ▶ Government schools (both primary and secondary)
- ▶ Government-aided private schools
- ▶ Private schools
- ▶ Madrasahs

The education system of Bangladesh is a mix of heterogeneous school providers including government, private, madrasah, English medium, kindergarten, and NGO-run schools. There are 1-2 years of pre-school education, 5 grades of compulsory free primary education, 3 years of junior secondary, and 2 years of upper secondary education. Primary education is free and compulsory for children aged 6-10 years.⁹

For the past decade, Bangladesh has been investing heavily to achieve the education Millennium Development Goals (MDGs). Besides reducing poverty, Bangladesh has achieved success in improving access to education. According to the Bangladesh Primary Education Annual Sector Performance Report (ASPR) 2014,¹⁰ the Gross Enrollment Rate (GER) and Net Enrollment Rate (NER) both continue to improve, and in 2013 the GER was 108.6% (boys 106.8% and girls 110.5%), up from 104.4% in 2012. The NER was

⁸ Ibid.

⁹ UNICEF. (2015). The children. Retrieved from http://www.unicef.org/bangladesh/children_355.htm

¹⁰ Ministry of Primary and Mass Education, Directorate of Primary Education, Monitoring and Evaluation Division, Government of the People's Republic of Bangladesh. (2014). *Bangladesh Primary Education: Annual Sector Performance Report*.

calculated to be 97.3% in 2013 (boys 96.2% and girls 98.4%), up from 96.7% in 2012. However, the report notes that concerns remain on the reliability of the underlying school age and population data for the calculation of these indicators. The World Bank Bangladesh Primary Education Development Program III (PEDP3) notes that in 2013 there were 1.83 million pre-primary children in government primary schools (GPSs) and non-registered non-government primary schools (NNPSs). This was more than double the enrollment in the Third Primary Education Development Program (PEDP3) in 2010, the project baseline year. Now, the project notes that nearly 100% of GPSs and 88% of NNPSs now are offering pre-primary education, and the percentage of grade 1 students with pre-primary education (PPE) also increased from 50% in 2012 to 67% in 2013.¹¹

The primary education system in Bangladesh is vast and in 2014 worked with 19.55 million students. Of this number, government primary schools alone cover 14.67 million students. In 2014, according to the Bangladesh Bureau of Educational Information and Statistics (BANBEIS), there were 78,363 primary schools of which 65,000 were government and government-aided primary schools. BANBEIS also notes that drop-out rates have been decreasing. Between 2005 and 2014, rates dropped from 47% to 21%, with girls' drop-out rates lower than boys. According to the most recent survey conducted by the BANBEIS, in 2014 the total number of English language students in English medium schools was 64,507, of which female students were 26,785 (46%).¹²

Figure 2: Number of Education Centers by organization

Name of the Organization/Centers	No. of Pre-Primary School Centers	No. of Primary School Centers	Total
Save the Children	27 (Chakma) 17 (Marma) 12 (Tripura) 7 (Rakhain)	1 (Chakma) 1 (Tripura)	65
Plan Bangladesh	446	333	779
BRAC	13800	22429	36229
Dhaka Ahsania	1577	952	2529
FIVDB	0	28	28
RDRS	1223	120	1343
VERC	236	1069	1305
GSK	0	16	16
CARITAS	1115	1115	2230
Action Aid	330	0	330

Source: CAMPE, Dhaka, Bangladesh

¹¹ World Bank. (2016). Projects & Operations: Bangladesh – Primary Education Development Program III. Retrieved from <http://www.worldbank.org/projects/P113435/primary-education-development-program-iii?lang=en>

¹² Bangladesh Bureau of Educational Information and Statistics. (2015). *Bangladesh Education Statistics 2014*. BANBEIS Publication No. 435. Dhaka: Ministry of Education – Bangladesh Bureau of Educational Information and Statistics.

In recent years, there has been substantial growth in pre-primary NGO centers (average enrollment of 30 students in each, as seen in Figure 2) and NGO-organized primary schools. Out of the total number of pre-primary education centers in 2013, the DPE was running 261 centers in primary schools. The rest comprised NGO-run centers, kindergartens, and the Early Learning and Childhood Development Programme (ELCDP) projects. While over 1.5 million children attended pre-primary classes supported by the government, close to a million children from poor families participated in NGO-run pre-primary education, and a substantial and growing number are enrolled in private kindergartens. According to the Bangladesh Rural Advancement Committee (BRAC), they run a total of 36,229 centers, of which 13,800 are pre-primary schools and 22,429 are primary schools. Also out of the total center's figures, 2,000 pre-primary and 1,803 primary school centers are operated by partner NGOs with BRAC's support. Dhaka Ahsania also operates 3,000 centers, whereas Save the Children runs 1,200 centers. Other NGOs who run centers are Plan Bangladesh, Christian Organisation for Relief and Rehabilitation (CARITAS), Proteeva, Friends in Village Development Bangladesh (FIVDB), Rangpur Dinajpur Rural Service (RDRS), Glaxo SmithKline (GSK), Action Aid, etc.

It is not known how many of the centers established by USAID-funded projects are still operational now that the projects have closed. The very significant contribution of BRAC and other NGOs to education in Bangladesh is summarized in Section 4.9 below.

As an advocacy and networking organization, Campaign for Popular Education (CAMPE) does not implement education programs directly, but CAMPE provides technical support to partner NGOs for implementing pre-primary education (PPE) Programs along with other interventions.

Bangladesh has had three Primary Education Development Programs (PEDPs), each with a distinct set of components and outcomes as follows:

PEDP I: 1997–2003: The project's objectives were to: a) improve school quality and system efficiency; b) establish a sustainable, cost-effective and better managed education system; and c) ensure universal coverage and equitable access to quality primary schooling. The first project components—improving school quality and system efficiency—provided teacher development and school cluster based training, improved curriculum, and strengthened national institutions.¹³

PEDP II: 2004–2011: The project's objectives were to reduce poverty through universal primary education and to contribute to sustainable socio-economic development and equity as envisaged in the Millennium Development Goals (MDGs). A level-two project restructuring was proposed to facilitate reallocation of the credit between unallocated funds and categories of expenditure.¹⁴

PEDP III: 2011–2016: The project's objectives are to a) increase participation and reduce social disparities in primary education, b) increase the number of children completing primary education and improve the quality of the learning environment and measurement of student learning, and c) improve effectiveness of resource use for primary education in Bangladesh.¹⁵

Between 2009 and 2013, the number of institutions participating in the Primary Completion Exam grew by 21.6%, the number of students grew by 49.6%, the number of students taking the exam grew by 53.2%, and the number of students passing the exam grew by 69.5%.

¹³ World Bank. (2016). Projects & Operations: Primary Education Development Project. Retrieved from <http://www.worldbank.org/projects/P009550/primary-education-development-project?lang=en>

¹⁴ World Bank. (2016). Projects & Operations: Bangladesh – Primary Education Development Project II. Retrieved from <http://www.worldbank.org/projects/P074966/primary-education-development-project-ii?lang=en>

¹⁵ World Bank. (2016). Projects & Operations: Bangladesh – Primary Education Development Program III. Retrieved from <http://www.worldbank.org/projects/P113435/primary-education-development-program-iii?lang=en>

2.3 Country Language Profile

The official language of Bangladesh is Modern Standard Bengali (Literary Bengali), also known as Bangla. It serves as the lingua franca of the nation, with almost 99% of Bangladeshis fluent in Standard Bengali or mutually comprehensible Bengali dialects as their first language. Thus, Bangladesh is very close to a monolingual country for the purposes of education. The Bengali of Bangladesh is comprehensible with the Bengali of West Bengal in India providing a total of close to 190 million first language speakers across Bangladesh and India. Within Bangladesh there were 106 million first language speakers in 2011,¹⁶ plus 19 million fluent second language speakers, and 13 million speakers of Bengali and other languages, including minority languages, which are common in the Chitagonian Hill Tracts. There are also 7 million Sylheti speakers, which is classified as 70%+ comprehensible with Bengali. The SIL Ethnologue lists 41 languages spoken in Bangladesh, and Figure 3 shows the most widely spoken after Bengali.¹⁶

Figure 2: Most widely spoken languages in Bangladesh after Bengali

Language	Number of Speakers in Bangladesh
Hindi	346,000
Bihari	250,000
Sadri	250,000
Shantali	225,000
Rohingya	200,000
Rakhine	200,000
Chakma	150,000 (plus 195,000 in neighboring countries)
Marma	150,000
Garó	120,000

Source: SIL. (2011). Languages of Bangladesh: An Ethnologue Country Study.

¹⁶ SIL. (2011). Languages of Bangladesh: An Ethnologue Country Study.

The indigenous people of northern and southeastern Bangladesh speak a variety of native languages, of which Chakma and Shantali are the most important. Ethnic minority children in Bangladesh from the southeast Chittagong Hill Tracts are among the country's least literate and as a result are at heightened risk of dropping out of school. Children in this region bordering India and Myanmar face practical discrimination in government-run schools because of their language problems. The rate of literacy is far lower among the ethnic minorities than it is nationally. It is reported by teachers that ethnic minority children from four to six years old lose interest in class and drop out when they cannot communicate with teachers or understand lessons because the prevailing language of instruction (LOI) is Bangla. Bangladesh has 50 schools enrolling 5,000 primary school students where Chakma is a de facto LOI. A decision was recently taken to write Chakma with the traditional Burmese-based Chakma alphabet documented by Grierson (1903) instead of using the Bangla alphabet.

English, though not having official status, is used by a minority in government, law, business, media, and education, particularly in Dhaka and the main urban areas.

2.4 Language of Instruction (LOI) Policy

After independence, education was perceived as the highest priority. With this objective, the Government of Bangladesh has established several education commissions and committees to discuss and debate the primary mechanisms for the appropriate roles of English and Bangla. This is one of the most debated issues among all policymakers. One group of policymakers favors English as the language of education, and another group favors the use of Bangla. Though English is an important language of government, education, and the media, it is used by mostly those in the capital and urban areas. In 2015, there were three LOI policies. In government

primary schools where Bangla-medium schools are the norm for both primary and secondary schools, English is taught as a compulsory subject, whereas subject learning and informal interaction take place in Bangla. In private primary schools where English-medium is common, Bangla is used for much of the informal social interaction between teachers and students, but English is used for subject-matter instruction. In addition, there are Madrasah religious schools where Bangla and Arabic are used as the languages of instruction. Bangladesh's Education Policy (2010) states that for children of ethnic minorities, measures will be taken to ensure the availability of teachers from their own ethnic group and to prepare texts in their own languages so that ethnic minority children can learn their own indigenous languages. In these initiatives, especially in preparing textbooks, the inclusion of respective indigenous communities will be ensured. Special assistance will be provided to the marginalized indigenous children. There are areas where no primary school exists. Primary schools will be set up in those areas inhabited by ethnic people. In some areas, there is only a thin ethnic minority population, so the schools may suffer from a dearth of children. In order to create opportunities for the enrollment of a sufficient number of children, residential facilities for teachers and students may have to be created.

In 2015, the MoPME created an initiative to prepare textbooks in 5 local languages out of the existing 36 minority languages. These were Chakma, Marma, Garo, Tripura, and Sadri (Shantali).

3. Current Print and Digital Reading Book Provision

School and classroom libraries in government primary schools are largely non-existent, particularly in rural areas. Even in urban areas, few government primary schools have libraries. In contrast, some private primary schools in cities have large libraries with internet facilities. The main problem is financing. The government does not supply reading books to schools, and very few primary schools can

afford to purchase reading books from their school operational funds. However, some big schools in urban areas do allocate annual budgets for their school libraries to buy reading books and materials. There are some impressive primary school libraries, particularly at teachers' training centers visited in Dhaka and Chittagong, but these are limited. Private schools are more likely to have a school library and buy reading books—often in English—than government schools.

The availability of children's books in government schools, where they exist, is largely restricted to Bengali books at the primary level, although English language books are available in some good English-medium schools and bookstores. Bengali children's books are widely available throughout the country, even if they are not necessarily available in government primary schools. There are many different Bengali language books on sale which are authored by Bangladeshi writers and published by Bangladeshi publishers or imported from Indian Bengali publishers in West Bengal. These titles have not been assessed for translatability or level, but there are sufficient titles available for at least a proportion to meet these criteria.

Dr. Nasiruddin Munshi, Department of Information Science and Library Management at the University of Dhaka, commented as follows on school libraries in Bangladesh:

- ▶ In the present age of information, much of the world has given priority to setting up libraries in schools as well as in communities for creating reading habits among school children; whereas in Bangladesh, most of the schools have no libraries at all.
- ▶ There is no national commission for school library development in Bangladesh.
- ▶ The national government has not given attention to establishing school libraries. As a result, students as well as teachers are not library oriented.
- ▶ Lack of funds is the most common problem for purchasing books and other reading resources for school libraries in Bangladesh. Sometimes the

parent organization allocates limited funds after fulfilling all other urgent school needs.

- ▶ Low professional status, poor working conditions, and insufficient infrastructural facilities make for a poor environment for school librarians.
- ▶ Considering the present situation of school libraries in Bangladesh, a special project should be undertaken by the international donor agencies (e.g., World Bank, UNESCO, International Federation of Library Associations) for school library development in Bangladesh.

According to an Education Watch Report published by CAMPE in 2014, school libraries were not commonly found in primary schools. Overall, only 12.6% of primary schools had library facilities but only 1.3% had a separate room for their library. The other school libraries typically put bookshelves into teachers' or head teachers' rooms. A separate library room was found in 0.8% of rural and 5.5% of urban primary schools. Libraries were available in 3.6% of kindergartens, 1.3% in each of the government and newly nationalized primary schools and madrasahs, and none in non-formal primary schools.

There are a number of good online bookstores operating in Dhaka which are not only selling children's reading books in digital formats to their Bangladeshi clients but are also selling to Bangladeshi living abroad because expatriate Bangladeshi parents want their children to be literate in their mother tongue.

Data on the provision of digital materials to schools can be seen in Figure 4. The MoPME has provided a laptop, a modem, and a multimedia screen to 1,500 model government primary schools (3 schools in each upazila) out of the current total of 65,000 government schools (or 2%). There are 519 upazilas in Bangladesh. The hardware is only for the use of teachers and not intended for direct use by children. Information and communications technology (ICT) labs have been set up in 55 Primary Teacher Training Institutes in Bangladesh. During an interview with the administrative officer at the MoPME, he described its plans to provide a laptop, modem, speaker, screen,

multimedia devices, and digital boards to all primary schools in Bangladesh by December 2017. Once again, this investment is intended at this stage for the use of teachers and not students.

Figure 3: Provision of digital materials to schools

Item	Bangladesh
Primary schools with access to electricity	80%
Primary schools with Internet access	15% have access but not necessarily with sufficient bandwidth for text and illustrations files
Computer/student ratios	No computers provided to government primary schools for use by students—only for use by teachers
Sufficiency of operational funds for schools to support information and communications technology for education (ICT4E)	No funds provided for primary ICT development or operations
MOE plan for future investments in hardware for ICT4E	Some plan for minor investments in ICT hardware for schools to be effective by December 2017, but this hardware is intended for teacher rather than student use

Source: MoPME

It is clear from the above data that the government primary school sector in Bangladesh will not have the hardware, connectivity, or operational funding to develop a digital media market for the use of reading books in schools on a national scale in the short to mid term. However, there are some affluent urban

private primary schools that are planning to develop in this way, and the existence of online bookstores demonstrates that this is already happening for elite schools and better-off parents. However, the government wishes to extend digital education to all primary schools using materials for teachers designed to support the curriculum.

4. Country Findings and Market Gaps

4.1 *Authorship and Publishing Capacity*

Bangladesh has a rich cultural heritage, particularly with children's books, and there is no shortage of good writers in Bengali in almost all disciplines, including children's books. In the 1980s, the book publishing industry in Bangladesh was in a poor state due to the unbalanced adult literacy rate between men and women; a lack of parental purchasing power; the lack of a reading habit in schools; a shortage of trained manpower in the publishing industry; the unavailability of good quality, raw printing materials; and a shortage of good printing presses. In addition, the government dominated, as it still does, the publication of school textbooks for state schools, which is always a critical market sector for any developing private sector publishing industry. In the meantime, the growth of private schools has provided a textbook market for private sector publishers in Bangladesh. Book piracy was a problem in Bangladesh back then, and it continues even now. In the 1980s, not many locally published children's books were available in the book market. Due to these factors, the publishing industry did not grow compared to the neighboring publishing industry in West Bengal, India. There were only 15–20 publishers publishing children's and general books out of about 150 local publishers.

In 2015, the situation has changed completely. After the civil war between East and West Pakistan in 1971, Bangladesh inherited the East Pakistan Provincial Textbook Board as well as the policy of state publishing and free provision of textbooks for government schools which continues up to the

present. The East Pakistan Provincial Textbook Board became the Bangladesh Textbook Board which was eventually reconstituted as the National Curriculum and Textbook Board (NCTB). Despite the ongoing lack of access to the textbook market in government schools, in 2016 it is estimated that there are up to 100 flourishing publishing houses in Bangladesh. Dhaka is the main publishing center. The factors that have enabled the private publishing sector to survive and develop are:

- ▶ Significant economic growth over the past two decades, which has increased national purchasing power and raised Bangladesh to a lower middle income country
- ▶ The continued expansion of market size through continued population growth
- ▶ The growth of private schools as a result of parental dissatisfaction with the quality output of government schools, which has supported the growth of school textbook publishing in Bengali, English, and local languages by private sector publishers
- ▶ The size of the Bengali local language market, which is large enough to provide support, and opportunities for alternative market sectors
- ▶ The continued strength of the trade and general books market in Bengali—including children's books

There is support also from international donors like UNESCO and NGOs to produce and promote children's books. If a literacy drive aimed particularly at girls combined with efforts to encourage lifelong reading habits can be promoted vigorously, the local publishers will automatically take the initiative to publish more children's books. As a result, there is now a growing, well-established, and professional children's book publishing sector in Bangladesh with access to quality authorship and illustrations resources. The World Book Fair in India is a good platform for exposure to a variety of children's books; in Bangladesh, a similar fair, called 'The Ekushe Book Fair,' is organized every year.

The output of the Bangladeshi publishing industry combined with the output of the powerful Kolkata-based Bengali publishing industry in neighbouring West Bengal in India means that there are thousands of primary level Bengali reading books currently available. These include original publications, translations, and adaptations of the best of foreign-published books. The National Book Trust (NBT) and the Children's Book Trust (CBT) in India also have developed substantial backlists of high quality primary level children's books in Bengali, which could also be available to any future Global Book Fund (GBF) investment program.

It was widely agreed in the research interviews with publishers that any significant extension of print runs via guaranteed bulk sales of reading books to government and private schools, along with fast payments, could have the impact of reducing prices by more than 50%. Reduced prices would increase parental capability to buy, thus increasing the general market for reading books in Bangladesh, perhaps by millions.

4.2 Printing

In the 1980s and 1990s, Bangladesh book printing was characterized by a large number of small printers, usually with sub-standard plant, who represented a powerful lobby and who tried to prevent government print contracts from being awarded to large, long print run printing plants. As a result, government textbook contracts were farmed out in small packages to multiple small printers who were generally poorly equipped, particularly without suitable binding plant, so very low quality manual binding was common. The overall result was low quality output in both durability and presentation.

In 2015, the situation changed and, although many small book printers continue to exist, Bangladesh now has a growing number of modern, well-equipped printers capable of providing durable and high quality manufacturing at competitive prices for both large and small print run titles. Letter 'n Colour Ltd and East-West Media Group are examples of new modern

printers, and Appendices 3 and 4 provide the 2015 company plant lists.

Bangladeshi publishers generally choose to manufacture in Bangladesh rather than in the highly developed neighbouring Kolkata printing sector and believe that they can obtain comparable quality and competitive prices. Competition between Bangladesh and West Bengal might require the selection of different titles in each country and the use of different manufacturing centers for any GBF interventions in Bangladesh and West Bengal, but the very large print run possibilities in Bengali in both countries and easy access to low cost, quality manufacturing facilities in both countries would not necessarily adversely affect the economics of two parallel interventions.

4.3 Procurement

The annual provision of textbooks for state schools is funded by the MOE, and there is no formal procurement process accessible to publishers and printers for the selection of authorship, publishing, and manufacturing services, all of which are handled internally by the NCTB. It is known, however, that the NCTB now contracts some of the large, modern printers for the manufacturing of free textbooks for government schools.

The NCTB is a department of the MOE. The key functions of the NCTB are:

- ▶ To examine curricula and syllabi in schools and to suggest revisions from time to time
- ▶ To pre-test and evaluate the effectiveness of the curricula, syllabus, and textbooks for schools
- ▶ To arrange for the preparation of textbook manuscripts
- ▶ To arrange for the publication, manufacture, and distribution of textbooks to government schools
- ▶ To approve the textbooks, prize books, and any library and reference books
- ▶ To encourage scientific, literary, and cultural works by providing grants and donations

- ▶ To donate books to poor and deserving students
- ▶ To execute other work as assigned by the government from time to time

The Directorate of Primary Education supplies NCTB's textbooks free of charge to all students in all grades every year from pre-primary to Standard X, irrespective of ownership. Thus, private schools also receive free government textbooks. Unfortunately, there is no easy way for parents to replace lost government textbooks because the DPE makes no provision for replacement textbook sales. Lost books are therefore replaced from any excess stock held by schools or by purchasing a used copy from the previous year via a second hand textbook market.

Because the MOE does not fund the provision of reading books to government primary schools, there are no procurement processes involved in the selection and purchasing of reading book titles. Titles purchased by individual primary schools are based on school selection and direct purchasing from publishers and/or booksellers using funds from their own operational budgets or from wealthier parents. Primary school reading book funding is more widely available in private schools than in government schools, and as a result, the proportion of English language reading books is probably higher in private schools. There will also be more primary level reading books in urban schools compared to rural schools. A number of NGOs also publish Bengali reading books to supply to NGO-funded primary and pre-schools.

4.4 *Bookselling and Distribution*

The availability and annual timely delivery of textbooks to primary schools has been a major achievement of the government. The NCTB is responsible for producing and distributing 110 million textbooks to all primary schools in all corners of Bangladesh every year.¹⁷ In the event of a GBF investment in primary reading books, the NCTB has now proved its ability to provide reliable, accountable distribution to the primary school sector.

There are numerous booksellers in Dhaka, Chittagong, and in other cities, towns, and urban areas supplying textbooks and primary reading books to parents and to private schools; however, the role of booksellers in private school supply is being undermined by an increasing tendency by publishers to bypass booksellers and to supply directly to schools. Bookseller penetration into rural areas is much less pronounced. The lack of parental purchasing power resulting from poverty, increasing levels of functional illiteracy, and the low-level development of a reading habit are the major constraints.

4.5 *Teacher Training Issues*

The most important teacher training issues in government primary schools related to reading books provision and use are identical to the issues in neighbouring West Bengal. These are:

- ▶ Teacher training in the use of reading books in class and at home in support of early literacy, the development of research skills, and overall student performance improvement
- ▶ Training in the importance, development, management, and use of school and classroom libraries
- ▶ Training in reading book stock management and conservation, bearing in mind the widespread sub-standard school storage facilities, particularly in rural areas

Ideally, the training described above should be part of primary, pre-service teacher training as well as the subject of intensive in-service teacher training.

Pre-service teacher training varies from one sub-system to another. For mainstream education, an 11-month long Certificate-in-Education (C-in-Ed) was the basic required pre-service training for a long time; this has now been upgraded to the 18-month Diploma-in-Education (DipEd). NGOs organize their own much shorter courses (2–3 weeks) primarily for non-formal teachers. Ebtedayee madrasah and

¹⁷ DPE. (2013). 2011 *National Student Assessment for Grades 3 and 5*. Dhaka: Directorate of Primary Education.

kindergarten teachers generally do not have any organized training provision. The survey conducted by CAMPE categorized pre-service teacher training as follows:

- ▶ Certificate-in-Education (C-in-Ed)
- ▶ Diploma-in-Education (DipEd)
- ▶ Bachelor-in-Education (B.Ed)
- ▶ Master of Education (M.Ed)
- ▶ NGO-operated, short-term training

In addition to the above, subject-based trainings are also offered to equip teachers with skills in specific subject areas. The proportion of teachers who meet the minimum professional qualification requirement has been maintained at around 83% since 2010. There was a spike in 2012 (89%) and continued improvement to 90% in 2013. Among the various groups of teachers, both male and female head teachers in GPS and male head teachers in NNPS have met the PEDP3 target of 95%. The female assistant teachers in NNPS (78%) are the group furthest from achieving the PEDP3 target by 2017.

According to the Bangladesh Primary Education Annual Sector Performance Report (2014), two training programs are targeted at head teachers: these are (i) school management and leadership and (ii) community mobilization for planning and monitoring. As stated in the report: “In 2013, the figures for GPS [Government Public School] were 65% for school management/leadership training and 48% for community mobilization training, whereas the equivalent figures for NNPS were 64% and 39%. Compared to the 2010 baseline, the scope of head teacher training has been reduced for both training programs. There is one training program for school management committee (SMC) members....The SMC training however has been de-prioritized since 2012 with no fund[s] allocated for this activity in the past two years.”¹⁸ As a result, the proportion of SMC-trained staff has declined steadily.

4.6 Financing

Though the Bangladesh government has increased the education budget to Taka 250.9 billion (US\$2.6 billion), in per capita terms it remains low if inflation is taken into account. In 2011, per student government expenditure (recurrent and capital) was Taka 4,676 (approximately US\$50) at the primary level. The share of education in the national budget was 11.28% in 2013–14 and was increased to 11.66% in 2014–15. Bangladesh’s total public expenditure on education is 2.06% of GDP. However, there is no government funding for the provision of reading books to primary schools, school library development, or the provision of teacher training guidelines on reading book use to support literacy.

4.7 School Management and Usage

In Bangladesh it is common for schools to be very remote and hard to reach, especially in poor upazilas. According to a report in the Brooke Shearer Working Paper Series,¹⁹ nationwide over 15 million children—97 percent of pre-primary and primary students in schools with information on class size—are in overcrowded classrooms (i.e., average room size per student is below the target of 1.18 square meters). Even after accounting for double shifting, more than three-quarters of all students are in overcrowded classrooms, with low contact hours for teaching and learning. In poorer upazilas, schools are also often not located in—or easily accessible from—remote communities, and overall infrastructure conditions are inadequate. In the poorest quintile of upazilas, fewer than 20 percent of schools had electricity. School Management Committees (SMCs) have been active in Bangladesh government schools, but their role in holding teachers and the school system accountable has been weak. Because the education system is highly centralized, upazila- and school-level agents have very limited authority in decision making and financial matters. At the same time, the ability of head teachers to play a greater role is often constrained. Studies have also found other challenges.

¹⁸ Ministry of Primary and Mass Education, Directorate of Primary Education, Monitoring and Evaluation Division, Government of the People’s Republic of Bangladesh. (2014). *Bangladesh Primary Education: Annual Sector Performance Report*.

¹⁹ Steer, L., Rabbani, F., and Parker, A. (2014). *Primary Education Finance for Equity and Quality: An Analysis of Past Success and Future Options in Bangladesh*. Brooke Shearer Working Paper Series. Brookings Institute.

For example, positions on SMCs are often politicized and used as a way to distribute patronage through teacher appointments, which has a negative impact on education if unqualified teachers are appointed.²⁰

Because of the lack of reading books in school and classroom libraries, in most Bangla-medium government primary schools, there is also a lack of data on school management practices and capacity for teaching and learning materials (TLMs). Any GBF investment in readers for Bangladesh would likely require the design of basic reading book management systems and pedagogic guidelines on using reading books for best effect in classrooms. It is reported that secure and adequate school storage alongside overcrowded classrooms are likely to be problems in many rural primary schools.

The SMC is required to have a large potential role in school development and performance upgrading. The members of the committee are comprised of community representatives on the basis of pre-determined criteria set by the MOE. Formation of the committees varies from one type of school to another. For example, according to government instructions, the government primary schools, newly nationalized primary schools, and ebtedayee madrasahs should have 11-member committees. The non-formal schools in general have seven-member committees. The 11-member committee comprises the following:

- ▶ 2 teachers from the school, including the head teacher as member/secretary
- ▶ 2 local persons interested in education
- ▶ The land donor for the school
- ▶ A teacher from the nearest high school
- ▶ 5 parents (male & female)

Mobilization of local resources for the schools and monitoring and supervision of school activities are two major responsibilities of the SMC. On average SMCs meet 7 times a year in rural schools and 6 times per year in urban schools.

4.8 Digital Opportunities

The government primary school sector in Bangladesh will not have the hardware, connectivity, or operational funding to develop a digital media market for the use of reading books in schools by students on a national scale in the short to mid term. Computerization for student use is not a primary school priority in Bangladesh, although a variety of funders are working on digital materials for secondary schools. However, in February 2016, the Prime Minister of Bangladesh announced the introduction of digital learning to the whole of the primary education sector using digitized materials designed to support the primary curriculum and using the hardware profile recently supplied to 1500 model primary schools (see Section 3, above). It is the intention of the government to finance this model hardware profile to all government primary schools by the end of 2017.²¹

4.9 Impact of Donor/NGO Interventions

Bangladesh Rural Advancement Committee (BRAC) is the largest NGO operating in the education sector in Bangladesh. Currently it runs more than 15,000 pre-schools and 22,000 primary grade I-V schools targeted on providing relevant education for the most vulnerable and disadvantaged children in the country. The BRAC primary schools currently enroll more than 600,000 students of whom over 60% complete 5 years of primary education. BRAC uses its own approaches to learning and teaching and publishes its own textbooks and readers for the first three grades of primary. For grades IV and V, it reverts to the state published textbooks. The MOE permits BRAC primary school graduates to sit for the promotional exams for entry into grade VI, where BRAC graduates consistently outperform students from the formal school system. In addition, BRAC also runs more than 300 community center schools which specialize in the development of reading skills. It has its own

²⁰ OPM (Oxford Policy Management). (2007). *Governance, Management and Performance in Health and Education Facilities in Bangladesh: Findings from the Social Sector Performance Qualitative Study*. Dhaka: Oxford Policy Management.

²¹ Palak, Z.A., and Islam, S. (2016). Primary Schools in Bangladesh to Go Digital, Reaching 20 Million Students. Retrieved from <https://www.brac.net/brac-in-the-media/item/903-primary-schools-in-bangladesh-to-go-digital-reaching-20-million-students>

university and colleges and trains its own teachers, in its own teaching and learning methods.

BRAC established an Education for Ethnic Children (EEC) unit in 2001 to adapt its non-formal teaching model to meet the needs of indigenous minority language children who do not speak Bangla. In the EEC schools, teachers explain lessons orally in the respective ethnic mother tongue languages alongside Bangla by using educational materials based on local culture and heritage. This method helps indigenous children to do better in class and increases their participation while improving their enrollment and retention rates. The bilingual texts and reading books have been developed up to Standard V in the Chakma language. Save the Children has also published a few primary reading book titles in the Chakma language. BRAC's bilingual teaching model is called the "Language Bridging Process," where the ethnic minority slowly comes to accept and understand the national LOI of Bangla. The various steps in these methodologies are listed below.

- ▶ **Step-1** General familiarization in both languages
Grade-I
- ▶ **Step-2** 20% talk in Bangla; 80% talk in ethnic language
Grade-II
- ▶ **Step-3** 40% talk in Bangla; 60% talk in ethnic language
Grade-III
- ▶ **Step-4** 60% talk in Bangla; 40% talk in ethnic language
Grade-IV
- ▶ **Step-5** 90% talk in Bangla; 10% talk in ethnic language
Grade-V

BRAC launched its Bridge School Project in 2013. It aims to complete the normal 5-year primary education program in 4 years.

In addition there are other NGOs such as CAMPE FIVDB also involved in the development and dissemination of reading materials for primary students. CAMPE publishes a Newsletter called

"*Pahor*" highlighting the right of education in their own languages for indigenous minority children. CAMPE, the principal forum of education-related NGOs, took the lead in holding consultations with its civil society constituency on progress towards Education for All (EFA) goals and the post-2015 agenda. CAMPE also had an active role in the work of the People's Forum on MDGs, a coalition of development NGOs in Bangladesh.

5. Discussion and Opportunities for a Global Book Fund

Bangladesh is a nearly monolingual country with Bangla/Bengali as the overwhelmingly dominant LOI. However, Bangla is not an underserved national language. There are thousands of children's book titles of varying quality available from Bangladeshi and Indian Bengali publishers as well as NGO-funded and published titles from BRAC, Strategic Transformation Consultants (STC), and other donors and NGOs. In addition, there is significant Bengali publishing output from book promotion organizations such as the Delhi-based NBT (CBT is not as active as in publishing children's books).

Although Bangla is not an underserved national language, it is an under-provided national language in terms of reading book provision to Bangla-medium primary schools. The shortage is due to lack of funding from the government for primary reading book provision as well as inadequate parental purchasing power in rural areas. In addition, there is little understanding in schools, or even within the MoPME, of the potentially powerful role of reading books in the achievement of early literacy and the general upgrading of student performance; nor has the MoPME encouraged the development of school and classroom libraries. However, interviews with MoPME officials indicated a willingness to consider a GBF-supported scheme to support primary level reading books to government and government-aided primary schools. There also appeared to be a slowly growing acceptance of the importance of reading books in the achievement of early literacy.

Print runs for a GBF-funded Bangla reading book project could reach hundreds of thousands or even millions, if Bengali-speaking populations in India were also included. There are also underserved minority languages in the north of the country which are in urgent need of both textbook and reading book support (e.g., Chakma, Marma, Garo, Tripura, and Shantali) where MoPME is planning to provide textbooks in local languages and which would also benefit from the provision of suitable minority language reading books. Print runs in these languages are unlikely to exceed 5,000 to 10,000 copies per title.

The local commercial publishing industry has the capacity and experience to handle the identification of quality Bengali authors and the publishing of suitable titles according to specifications. NGOs have also been involved in developing minority language reading books, and there is an established NGO track record of primary reader publishing in Bangla.

NCTB has demonstrated its capacity to deliver TLMs to all government primary schools—both urban and rural—in an efficient and accountable manner on an annual basis.

Bangladeshi printing and binding has improved dramatically in recent years and could now handle large and small print runs of quality durable books at competitive prices. It is unlikely that Bangladesh would accept a GBF scheme that utilized printing resources outside the country.

In-country program components to make any GBF provision effective should include (a) the design of simple TLM school-based management systems and associated mass teacher training and ongoing monitoring; (b) the provision of simple pedagogic guidelines for the effective use of readers in the classroom to achieve the goals of early literacy, upgraded student achievement in all school subjects, and the development of a lifelong reading habit; (c) guidelines for the establishment and use of simple school and classroom libraries; and (d) improved school storage capacity in rural primary schools.

There appears to be no immediate prospect of the development of a national digital framework for reading book provision for government primary schools, despite government policy statements; although there are private schools that are moving in this direction.

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7. Appendix

7.1 Appendix 1: Interview List

Publishers			
Panjaeree Publications Ltd	Dhaka	Sunil Kumar Dhar	Head R & D
Panjaeree Publications Ltd	Dhaka	Neloy Nandi	Assistant Manager
Mullick Brothers	Dhaka	Shahidul Hasan Mullick	Director
Adi Ganto	Dhaka	Mustak Raihan	Owner
Hakkani & Parama Publishers	Dhaka	Golam Mustafa	CEO & Managing Director
Hakkani & Parama Publishers	Dhaka	Mahammudunnaby Robin	Director & Chief Coordinator
Book Trade Market	Dhaka		
University Press Ltd	Dhaka	Mohiuddin Ahmed	Managing Director
University Press Ltd	Dhaka	Badiuddin Nazir	Publisher's Adviser
Printers			
Letter 'n Colour Ltd	Dhaka	Anup Kumar De	Managing Director
NGOs			
BRAC	Dhaka	Prafulla Kumar Barman	Program Head Education
Dhaka Ahsania Mission	Dhaka	Ehsanur Rahman	Executive Director
Dhaka Ahsania Mission	Dhaka	Kazi Ali Reza	Director, Communication & Public Relation
Campaign for Popular Education (CAMPE)	Dhaka	Tapon Kumar Das	Deputy Director
Gano Shahajjo Sangstha	Dhaka	Nishat Jahan Rana	Chairman
Ministry of Culture			
Bangladesh Sishu (Children) Academy	Dhaka	Mosharrof Hossain	Director
Bangladesh Sishu (Children) Academy	Dhaka	Razian Akhter	Head Library
Department of Public Libraries, Ministry of Cultural Affairs	Dhaka	Nikhil Sarkar	Deputy Director
Department of Public Libraries, Ministry of Cultural Affairs	Dhaka	Ashish Kumar Sarkar	Director General
Department of Public Libraries, Ministry of Cultural Affairs	Dhaka	Harunor Rashid	Assistant Librarian
Ministry of Cultural Affairs	Dhaka	Muhammad Hamidur Rahman (Tushar)	Assistant Director

Ministry of Education			
Dept. of Information and Library Management, University of Dhaka	Dhaka	Muhammad Mezbah-ul-Islam	Chairman
Dept. of Information and Library Management, University of Dhaka	Dhaka	M. Nasiruddin Munshi	Professor
Directorate of Primary Education	Dhaka	Alauddin al Azad	Administrative Officer
		Mahfuzur Rahman Jewel	Education Officer
		Fazle Siddique Md Yahya	Deputy Director (Program)
			Director General
		Shams Uddin Ahmed	Director (Administration)
National Curriculum and Textbook Board		Imrul Hasan	Secretary NCTB
National Curriculum and Textbook Board		Mustaq Ahmed Bhuiyan	Controller of Distribution
Schools			
Jaidevpur Primary Teachers Training Institute	Gazipur, Dhaka	Mhd Mizan Ur Rahman	Librarian
Jaidevpur Primary Teachers Training Institute	Gazipur, Dhaka	Dilruba Begum	Deputy Super
Chittagong Medical College Hospital Model Primary School	Chittagong	Kazi Ayesha Akhter	Assistant Teacher
Chittagong Medical College Hospital Model Primary School	Chittagong	Tapan Kumar Chowdhury	Thana Education Officer
Postakar Government Girls Primary School	Chittagong	Sukriti Das	Principal
Government Primary School	Chittagong	Kazi Sultane Shaheen	Principal
Khan Saheb Balak(Boys) Govt Primary School	Chittagong	Nafiza Begum	Head Mistress
District Primary Education Board	Chittagong	Hrishikesh Shil	Education Officer
Sher-e-Bangla Nagar Govt Girl's High School	Dhaka	Nazmun Nahar Shaheen	Headmistress

7.2 Appendix 2: Letter 'n Colour Ltd Plant List

SL	Machine Name	Brand	Origin	Quantity
Printing Machine List				
1	Single Color Web Printing Machine	Orient	India	6
2	Single Color Web Printing Machine	NGB	India	1
3	Four Color Web Printing Machine	NGB	India	1
4	Four Color Web Printing Machine	Orient	India	2
5	Four Color Offset Printing Machine (Double Demai)	Roland Parva	Germany	1
6	Two Color Offset Printing Machine (Double Demai)	Roland Parva	Germany	2
7	Two Color Offset Printing Machine (Demai)	Heidelberge	Germany	1
8	Single Color Offset Printing Machine (Demai)	Heidelberge	Germany	1
Cutting Machine List				
1	3 Knife Cutting Machine	3		
2	Polar Cutting Machine	Polar Mohr	Germany	2
3	China Cutting Machine	1		
4	Die Cutting Machine		China	1
Binding Machine List				
1	Binding Machine (6 Clamp)	Welbound	India	5
Other Machine List				
1	Plate Making Machine			2
2	Lamination Machine			2
3	Spot Machine			1
4	U V Lamination Machine (Double Demi)			1
5	Creasing Machine			1
6	Generator P550-1	Energypac		1
Employee List				
1	Official Employee			15
2	Printing Employee			60
3	Binding Employee			300
4	Cutting Employee			30
5	Lamination Employee			20
Warehouse				12000 sq ft
Vehicle of Transport		Energypac		2

7.3 Appendix 3: East West Media Group Plant List

Offset Printing Machines				
Sl.No	Description	Size	Color	Total Qty.
1	Heidelberg (MOE)	19" × 25.5"	1 Color	1
2	Roland Parva	23" × 36"	2 Color	1
3	Heidelberg (Sordz)	23" × 36"	2 Color	1
4	Heidelberg (MOZ)	19" × 25.5"	2 Color	1
5	Heidelberg (SORZ)	28" × 40"	2 Color	1
6	Solna	18" × 23"	2 Color	3
7	Roland Parva	22" × 33"	4 Color	1
8	Roland Parva	23" × 36"	4 Color	3
9	Roland Parva	25" × 37"	4 Color-RVP2C	1
10	Roland Parva	22" × 32"	4 Color-RVP-1	1
11	Heidelberg	Offset Machine	5 Color	1
12	Heidelberg	Offset Machine	8 Color	1
13	Heidelberg	Offset Machine	10 Color	1

Web Machines			
Sl.No	Description	Size & Color	Total Qty.
1	Line#1, Fast300-24Pages	16pages-4c, 8pages-1c	1
2	Line#2, Fast300-24Pages	16pages-4c, 8pages-1c	1
3	Line#3, Fast300-24Pages	16pages-4c, 8pages-1c	1
4	Line#4, Fast300-24Pages-4c		1
5	Line#5, Fast300-24Pages-4c		1
6	Line#6, Fastrak-12Pages	6pages-4c, 6pages-1c	1
7	Line#7, Fastrak-12Pages	6pages-4c, 6pages-1c	1
8	Line#8, Fast300-12Pages -4c		1

Corrugation Carton Making Plant:

Dedicated paper specialists and our custom computer system allow for roll tracking and reporting throughout the converting process to manage projects efficiently. We are specialized in Carton Making, Box Making, Shopping Bag Making, and others types of converting. Quality of carton packaging and printing holds great importance.

Sl.No	Description	Total Qty.
1	PAPER Converting Machine, Line # 1	1
2	SPS Sheet Pasting Machine, 75", Motor:1HP	1
3	SPR Sheet Pressing Machine, (65" * 75"), Motor:1HP	1
4	FBRC 4 Bar Rotary Cutting & Creasing Machine 75"	1
5	OHCS Eccentric Slotter 75"	1
6	High Speed Power Box Stitching Machine, 42"	2
7	BCH Heavy Duty Board Cutter-58"	1
8	Card Board Box Making Machine, TC 1100	1
9	ZH-GD-650 Folder Gluer	1

Flexo/ Poly Printing & Packaging:

Sl.No	Description	Total Qty.
1	Rotogravure Machine	1
2	Slitter Machine	1
3	Inspecting Machine	1
4	Seal Bag Making Machine	1
5	Dry Wet Laminating Machine	1

Post Press:**Die Cutting Machine**

Sl.No	Description	Size	Total Qty.
1	Heidelberg (Die Cutting)	22.25"× 32.5"	2
2	Die Cutting (China)	23"× 36"	1
3	Die Cutting (China)	18"× 23"	1
4	Die Cutting Machine (Heidelberg)	28"× 41"	1

Cutting Machine			
Sl.No	Description	Size	Total Qty.
1	Polar Cutting (Germany)	45"× 48"	8
2	China Cutting	36"× 44"	2
3	Polar 137 EM Monitor Paper Cutting Folding Machine		1
4	Knife Grander (Sharp) Machine (China) # DMSQ		1
Glue Binding Machine			
Sl.No	Description	Size	Total Qty.
1	Perfect Glue Binding Machine (China)	1 Clamp	13
2	Perfect Glue Binding Machine (England)	7 Clamp	1
3	Perfect Glue Binding Machine (Switzerland)	9 Clamp	1
4	Perfect Glue Binding Machine (Switzerland)	10 Clamp	2
5	Perfect Glue Binding Machine (Japan)	14 Clamp	1
6	Perfect Glue Binding Machine (Japan)	20 Clamp	1
Binding Machine			
Sl.No	Description		Total Qty.
1	Muller Martini Perfect Binging Line		2
2	Stitching Machine		5
Folding Machine			
Sl.No	Description		Total Qty.
1	Folding Machine		2
2	Sthal K 78 4KTL Digital Folding Machine		2
Lamination & Foil Print Machine			
Sl.No	Description		Total Qty.
1	Laminating Machine (Film)		1
2	UV – Laminating Machine with Dryer 36"		2
3	Foil Machine (China) # 15"X20"		1
4	Wooden Cutting Machine		1
5	Hot Stamping (Foil Print) Machine		1

Others Machineries

Sl.No	Description	Total Qty.
1	Plate Exposer Machine	4
2	Air Compressor	28
3	Roll Re-Winding Machine	2
4	Counting Machine (Uchida)	1
5	Counting Machine (Vacuumatic)	1
6	Roller Wash Machine	2
7	Spiral Binding Machine	1
8	Foil Cutter Machine	1
9	Automatic P.P. Strapping Machine	6

7.4 Appendix 4: Abbreviations & Acronyms

AEP:	Adult Education Programme	CLC:	Community Learning Centre
ASC:	Annual School Census	DFID:	UK Department for International Development
ASPR:	Annual Sector Performance Report (for Primary Education)	Dip-in-Ed:	Diploma in Education
B. Ed.:	Bachelor of Education	DPE:	Directorate of Primary Education
BANBEIS:	Bangladesh Bureau of Educational Information and Statistics	ECCE:	Early Childhood Care and Education
BBS:	Bangladesh Bureau of Statistics	ECD:	Early Childhood Development
BMET:	Bureau of Manpower, Employment and Training	ECE:	Early Childhood Education
BNFE:	Bureau of Non-Formal Education	ECECD:	Early Childhood Education, Care and Development
BRAC:	Bangladesh Rural Advancement Committee	ECED:	Early Childhood Education and Development
BSA:	Bangladesh Shishu (Child) Academy	EEC:	European Economic Community
BTEB:	Bangladesh Technical Education Board	EFA:	Education For All
CAMPE:	Campaign for Popular Education	ELCDP:	Early Learning and Childhood Development Programme
CARITAS:	Christian Organisation for Relief and Rehabilitation	FIVDB:	Friends in Village Development Bangladesh
CBT:	Children's Book Trust, New Delhi	GDP:	Gross Domestic Products
CHTs:	Chittagong Hill Tracts	GBF:	Global Book Fund
CIDA:	Canadian International Development Agency	GMR:	Global Monitoring Report
C-in-Ed:	Certificate in Education	GNP:	Gross National Product
		GPS:	Government Primary School

GSK:	Glaxo SmithKline
ICT:	Information and Communication Technology
ICT4E:	Information and Communication Technology for Education
LOI:	Language of Instruction
M.Ed:	Master of Education
MOE:	Ministry of Education
MoPME:	Ministry of Primary and Mass Education
NBT:	National Book Trust, New Delhi
NCTB:	National Curriculum and Textbook Board
NER:	Net Enrollment Rate
NFE:	Non-Formal Education
NGO:	Non-Government Organization
NORAD:	Norwegian Agency for Development Cooperation
NNPS:	Non-Registered Non-Government Primary School
NSA:	National Student Assessment
OPM:	Oxford Policy Management
PDP:	Primary Education Development Program

PMED:	Primary and Mass Education Division
PPE:	Pre-Primary Education
RDRS:	Rangpur Dinajpur Rural Service
RNGPS:	Registered Non-Government Primary School
ROSC:	Reaching Out-of-School Children
SMC:	School Management Committee
STC:	Strategic Transformation Consultants
TLM:	Teaching and Learning Material
UEO:	Upazila Education Officer
UEPP:	Upazila Education Performance Profile
UNDP:	United Nations Development Program
UNESCO:	United Nations Educational Scientific and Cultural Organization
UNICEF:	United Nations Children Fund
UNLD:	United Nations Literacy Decade
UPE:	Universalization of Formal Primary Education
UPEP:	Upazila Primary Education Plan
URC:	Upazila Resource Centres
USAID:	United States Agency for International Development
VERC:	Village Education Research Center

Global Book Fund Country Study

ETHIOPIA

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1. Methodology

The Ethiopia country study was conducted by International Education Partners (IEP) over the course of October 2015—January 2016. It consisted of a combination of literature review and interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background and Education System²²

Ethiopia has a total area of 1,104,300 km² and a population of more than 90 million, of which the majority, 83%, live in rural areas. The official language in Ethiopia is Amharic, but individual states tend to adopt their own dominant languages as state languages and as primary education Languages of Instruction (LOIs). Ethiopia is considered to be a low income country; the annual per capita income of Ethiopia is US\$380, and the Human Development Index is 173.²³

There are two primary education cycles comprising lower primary (P1–4) and upper primary (P5–8); likewise, there are also two secondary cycles. Primary school enrollment rates are 90%, but less than half complete the primary cycle. A much smaller proportion of children attend secondary school, and even fewer attend the second cycle. School attendance is lowest in rural areas due to lack of provision and alternative occupations. The school curriculum in

later years covers more subjects at a higher level than curricula in most other SSA countries.

The education system currently serves a population of about 21 million students, 440,000 teachers, and 34,000 schools in 11 linguistically diverse regions. There are 15.7 million primary students (8.3 million boys and 7.5 million girls) in 32,000 schools. There are only 1,910 secondary schools. Figure 1 below shows the administrative regions of Ethiopia.

2.2 Country Language Profile

According to the SIL Ethnologue, there are 88 languages spoken in Ethiopia. Most of these languages belong to the Afroasiatic family (Semitic and Cushitic; Omotic languages are also spoken, though their classification is uncertain). Additionally, Nilo-Saharan languages are spoken by the nation's Nilotic ethnic minorities. Of the languages spoken in Ethiopia, 86 are classified as living languages and 2 are extinct, with a further 8 in danger of extinction and 5 more close to extinction.

English is the most widely spoken foreign language and is the language of instruction (LOI) in secondary schools and universities. Amharic is the official language and was for many years the language of primary school instruction but has been replaced in many areas by major local languages such as Oromo and Tigrinya.²⁴

In terms of writing systems, Ethiopia's principal orthography is Ge'ez, which dates back to the 5th/6th centuries BC. Other writing systems have also been used over the years by different Ethiopian communities. These include Arabic script for writing some Ethiopian languages spoken by Muslim populations and Sheikh Bakri Sapalo's script for Oromo. Today, many Cushitic, Omotic, and Nilo-Saharan languages are written in Roman/Latin script.

²² This section is a synthesis of IEP analysis based on the full list of resources found in the reference section.

²³ World Bank. (2014). Retrieved from <http://data.worldbank.org/>

²⁴ Lewis, M. Paul, Gary F. Simons, and Charles D. Fennig (eds.). (2015). SIL Ethnologue for Ethiopia. *Ethnologue: Languages of the World*, Eighteenth edition. Dallas, Texas: SIL. International.

Figure 4: Map of Ethiopia



Based on the 2007 Ethiopian census, the largest first languages currently in use in Ethiopia are shown below in Table 1.²⁵

2.3 Language of Instruction (LOI) Education Policy

Until 1991, Amharic was the LOI for primary schools, and English was the LOI for secondary education. In 1991, the new constitution of the Federal Democratic Republic of Ethiopia granted all linguistic groups the right to develop their own languages and Teaching and Learning Materials (TLMs) and to establish mother tongue primary education systems. This is a marked change to the language policies of previous governments in Ethiopia. Table 1, above, demonstrates that there are a limited number of local languages with large numbers of speakers dominated by Oromo and Amharic. There are also smaller languages but with still significant speaking populations such as Somali and Tigrinya. Finally, there are a large number of local languages with small numbers of speakers. Government policy is that every local language can be used as an LOI for primary education and that all associated TLMs can be published in all local languages. The General Education Quality Improvement Project (GEQIP)—further details below—has been used as the funding vehicle to launch this policy. Under GEQIP, invitations for bids were advertised for primary textbooks and teachers' guide submissions in English,

Table 1: Most Common Languages in Ethiopia^{26,27}

Language	Number of Speakers (millions)	Percentage of Total Population	Notes
Oromo	25.5	31.7%	Working language of Oromiya
Amharic ²⁸	21.6	26.9%	National Language
Somali	4.6	5.7%	Working language of Sumale
Tigrinya	4.3	5.3%	Working language of Tigray
Sidamo	3.0	3.7%	
Wolaytta	1.7	2.1%	
Gurage ²⁹	2.5	3.1%	
Afar	1.28	1.6%	Working language of Afar

Widely spoken foreign languages include English, Arabic, and Italian

²⁵ Central Statistical Agency. (2007). *Population and Housing Census Report-Country—2007*.

²⁶ SIL. (2015). Ethiopia. Retrieved from <http://www.ethnologue.com/country/ET/status>

²⁷ CIA. (2015). CIA Factbook.

²⁸ National Language.

²⁹ Subgroup that includes six languages and multiple additional dialects.

Oromo, Amharic, Somali, and Tigrinya. Other smaller languages were then encouraged to use one or more of the local language courses listed above as the basis for translations/adaptations into dedicated mother tongue materials. According to data provided by the World Bank and SIL, this process has resulted so far in the development and publication of primary course materials in 37 to 45 local languages.

The process described above has not been without its problems. For some of the smaller languages, the attempts to develop their own TLMs in support of a mother tongue primary education system were expensive and difficult to deliver. Some of the local languages had no widely established orthographies, and local language skills were often poorly developed. As a result, some of the mother tongue course materials are considered to be sub-standard. However, while there is no current policy compulsion to use a local language as an LOI, current government language policy has tended to enable each state to develop and use its own languages as its LOIs for primary schools. In most states, the common state language will be the mother tongue for most students and a widely spoken and understood dominant language for other students.

Policymakers in Ethiopia believe that mother tongue instruction could improve primary access, performance, and completion rates. As a result, up to 45 local languages (out of a total of 88) are currently used as languages of instruction or are under preparation for use, with several different local languages co-existing within the same regions. A survey by Young Lives (2014) revealed that about 80.5% of P4 students in seven regions learn in the same language that they speak at home. However, these diverse languages have presented challenges in the provision of TLMs.

Unfortunately, Regional Education Bureaus (REBs) were hampered by a shortage of experts who could

undertake the adaptations/translations. Teachers were also required to be trained in reading and writing skills in languages for which little or no printed materials had been available previously. Fragmentation of print runs also meant that some regions had to use local printers (with access to only low-quality text paper, printing, covers, and bindings), incurring high unit costs and with reduced durability. Some regions, particularly the most linguistically diverse regions, have chosen to start with piloting instruction in early grades before scaling up to higher grades. Inadequate preparation (including inadequate teacher training and lack of appropriate TLMs) could undermine achievements in basic literacy, learning in other subjects, and transition to and success in secondary schools. With considerable care and preparation before introducing mother tongue instruction, however, savings through gains in educational efficiency and equity could outweigh the additional costs of local language textbooks.

In Ethiopia, 14 local languages, including all of the main languages, are available for study as majors in universities, which provides useful support for the development of local language skills by authors, publishers, and classroom teachers. There are published textbooks and teachers' guides for teaching and learning mother tongue languages in nine minor languages.

3. Current Print and Digital Reading Book Provision

Until recently, there was a severe shortage of textbooks and reading books in Ethiopia. Where they were available, the content and production quality were considered to be poor. This posed a big challenge for effective teaching and learning and the upgrading of student achievement. However, since 2009, the government, with the support of development partners under the GEQIP,³⁰ has transformed the

³⁰ General Education Quality Improvement Project (GEQIP) is (2009–2018) a two-phase program aimed at improving the quality of general education in Ethiopia. It has five components: curriculum reform and textbook provision; teacher development program; school improvement program; management and capacity building; and ICT in education. GEQIP is a government-led program with active participation of six development partners. All funding sources are pooled and the World Bank is the supervising entity. GEQIP1 became effective in June 2009 and ended in December 2013. GEQIP2 became effective in February 2014 and will end in July 2018.

Table 2: Availability of TLMs

Level	Titles	Textbooks (in millions)	Teachers' guides (in millions)	Total (in millions)
Primary	102	53.3	1.3	54.6
Secondary	46	22.9	0.6	23.5
Total	148	76.2	1.9	78.1

provision of TLMs in primary and secondary education both in terms of quantity and quality.

Prior to the current reforms, the MOE and REBs were responsible for developing textbooks for the education system. Both fully relied on an MOE-administered institution—the Ethiopian Materials Production and Distribution Agency (EMDPA)—to publish, print, and distribute to the regions. Even after the government transformed EMDPA into a legally and financially autonomous public enterprise fully exposed to open competitive bidding, private publishers and printers had almost no involvement in the textbooks market. However, the state-controlled supply of textbooks was widely considered to be inadequate. Student to textbook ratios varied considerably across regions, but generally students either shared textbooks or fully relied on teachers' notes. Where available, they were of poor quality, distribution was inefficient, and teachers' guides were non-existent. Supplementary materials, including reading books, were in very short supply.

Since 2009, the MOE has adopted a new approach to procuring TLMs by procuring the services of private publishers from overseas and possibly within Ethiopia as well. One of the core components of GEQIP1 was the provision of TLMs. The project's target was to make available textbooks and teachers' guides in all subject areas and grades (Grades 1–12) on the basis of one book per student in all schools.

Through competitive procurement managed by the MOE, textbooks and teachers' guides were required to be developed in five major languages (Amharic, English, Oromifa, Somali, and Tigrinya), compliant with the new curriculum. Regions were then

expected to translate/adapt these textbooks and teachers' guides into any other required languages of instruction. This was to ensure that the newly developed materials were accessible to more linguistic groups of students.

GEQIP1 has improved access to quality textbooks and teachers' guides in Ethiopia. With GEQIP1 support, as shown in Table 2, 78.1 million textbooks and teachers' guides were developed, printed, and distributed to all primary and secondary schools. These comprised 148 titles of textbooks and teachers' guides.

By the end of the first phase of the project in December 2013, it had achieved an estimated pupil to book ratio of 1:1 or better in seven subjects of primary education and thirteen subjects of secondary education. Corresponding teachers' guides were provided at a rate of 1 per 40 students. Schools also bought some supplementary reading materials with their discretionary school grants provided by GEQIP.

The project's success was made possible through competitive partnerships with private sector publishers selected by competitive bidding which replaced the previous system of state textbook provision. The new arrangement led to improved quality of materials and reduced costs which resulted from competition. GEQIP2 (2014–2018) also has a large TLM sub-component to expand and consolidate the gains of GEQIP1 and to address the shortfalls and problems identified by GEQIP1. GEQIP2 supports the reprinting of textbooks to maintain current textbook to pupil ratios of 1:0.9. Reprints include an annual replacement provision of 8% to replace lost or damaged copies and to meet increases in enrollment over the duration of the project. The project also

supports the provision of new textbooks and teachers' guides as well as supplementary reading materials not provided under GEQIP1. In addition, the project will continue to provide discretionary grants to schools. GEQIP1's support has been mostly in textbooks and teachers' guides. Using the project's school grants and other sources (*woreda/district* block grants, community contributions, inputs from other development partners), schools were also able to procure some reading books, but these were not adequate in quantity nor were they systematically provided. Hence, in addition to textbooks and teachers' guides, the World Bank considers that it is important that the MOE develops a minimum profile of supplementary materials, including reading books, by grade, subject, and language which schools need in order to deliver the learning objectives of the curriculum. The profile needs to clarify supply standards, target life-expectancy, and loss and damage rates. This will help decision makers to make financial projections and publishers to respond to specified needs.

GEQIP1 provided single title textbooks and teachers' guides to all schools for each subject, grade, and language of instruction. Each winning bidder was the sole supplier of textbooks for a particular LOI subject and grade.³¹

Under GEQIP2 the project will provide an additional 26.6 million copies of P1–8 textbooks and teacher's guides in seven local languages (Amharic, Oromo, Somali, Tigrinya, Hadiyisa, Sidamu, and Wolayita) plus 24.8 million P1–4 local language reading books published in the same seven languages listed above. As of early 2016, all of these titles are in procurement

In addition to GEQIP, other major donor programs include USAID's Reading for Ethiopia's Achievement Developed (READ) technical assistance project. This initiative seeks to improve the reading and writing abilities of children in Grades 1–8. As of June 2015, the program had “developed a new national reading

curriculum and more than 200 textbooks for seven mother tongue languages, printed and distributed approximately 2.6 million textbooks and teacher guides.”³²

In the longer term, according to the government's draft textbooks and teachers' guides development and procurement policy (March 2012), the MOE's intention is to introduce a multi-textbook system which would allow schools to choose the textbooks and reading books best suited to their students' context and needs. However, the use of multiple languages could fragment the market and increase the unit costs of textbooks. In such cases, smaller language groups (e.g., Dorze, Gawwada) could be underserved as smaller print runs might not attract bidders. Additionally, the MOE or REBs need to determine (i) the number of titles per subject and grade and then evaluate and approve the list of TLMs, (ii) put in place appropriate regulations to prevent unnecessary price mark-ups, and (iii) agree on selection and funding mechanisms. With regard to the latter, for instance, schools could select TLMs from the approved list and, using government funding, either directly buy from the market or request *woredas* (districts)/REBS to buy for them. Under the scenario of decentralized financing, selection, and ordering, (i) teachers, principals, and *woreda* officers need to be trained in the selection, ordering, management and classroom use of the TLMs; and (ii) REBs need to conduct regular inspection and school audits to prevent and rectify any corruption and misappropriation of funds.

Early Grade Reading Assessment (EGRA) research in Ethiopia in 2010 demonstrated extremely poor levels of literacy achievement. A significant percentage of Grade 2 students could not read any words in a basic reading test. In Sidama, 69% could not read a single word, and 42% failed to read a single word in Oromiya. Even in Grade 3, 54% of students in Sidama and 21% in Oromiya were still absolutely illiterate. In each of the 8 regions, more than 80% of children

³¹ Woldetsadik, G. (2015). *Provision of teaching and learning materials in Ethiopia: Achievement and lessons learned under General Education Quality Improvement Project 1*. Washington, DC: World Bank.

³² USAID. (2015). Ethiopia: Education. Retrieved from <https://www.usaid.gov/ethiopia/education>

failed to read at the expected oral reading fluency rate. In Sidama, 100% failed. In Sidama, Benishul-Gumuz, and Tigray, more than half of Grade 2 students did not comprehend a story at all because they could not decode the printed words. Even in Addis, the percentage of Grade 2 children with zero reading comprehension was more than 24%.

4. Country Findings and Market Gaps

4.1 Authorship and Publishing Capacity

Countering the weak local MOE capacity to author and publish the new curriculum TLMs was a fundamental feature of the GEQIP design. Many years of state textbook publishing have delayed the development of good educational publishing skills in Ethiopia outside the Education Materials Production and Distribution Agency (EMPDA), and even within Addis Ababa there is a scarcity of private sector educational publishing houses with relevant experience in textbook and teachers' guide development, planning, and management. Even if highly developed writing and design skills are available, the wrong kind of publishing organization and the wrong kind of publishing management will limit or even nullify their effective application. The project not only provided opportunities for private sector publisher involvement through competitive bidding but also provided opportunities for local authors hired by international publishers to enhance their skills via professional guidance with experienced textbook publishers. The MOE also authored and published primary environmental science and integrated science using its own authors because print runs were too low to interest the private sector.

Local private sector publishers had limited publishing experience and expertise to offer to the bidding process because they had never previously been permitted to participate in TLM provision to the education system. International publishers, including

regional publishers based in East Africa, had experience and expertise in developing textbooks up to international standards and in working with local authors. As a result, local publishers had difficulties in winning the long print run contracts offered under international competitive bidding (ICB) and were often restricted to smaller contracts offered via national competitive bidding (NCB) and local shopping. They were not able to compete with international publishers in quality and price, and participation was thus often limited to smaller print runs with lower quality standards (single color with lower quality paper, cover, and bindings, etc.) to meet the immediate needs of schools. Current policies in Ethiopia relating to decentralization, mother tongue instruction, and liberalization have provided new opportunities/markets for the local publishing of textbooks and reading books. Small print runs are less attractive to international publishers. These new policies have opened significant niches for local publishers. However, while the government is keen to involve local publishers/printers, there is a question as to whether this should be done at the expense of higher costs, inferior quality, and delays. The government would need to provide local publishers with the necessary support to enhance their capacity to meet the required quality standards for the government's desire to procure from local publishers to be cost-effective and of high quality.

Joint ventures with international publishers could also provide local publishers with opportunities to gradually build their experience and expertise. However, local publishers and printers didn't make use of this opportunity under GEQIP1.

4.2 Printing

With regard to local textbook manufacturing capacity, the Reconnaissance Study of Textbook Printing Capacity in Ethiopia concluded as follows:³³

³³ Read, T. (2015). *Where have all the textbooks gone?: Toward sustainable provision of teaching and learning materials in Sub-Saharan Africa*. World Bank.

Figure 5: Capabilities of Ethiopian Printers³⁴

In comparison with international printers, the Ethiopian printer can:

	Print books in four colors?	Thread sew the printed book pages?	Print covers and bind the books?
Berhane Selam	Yes	No	Yes
Branna	No	Yes	Yes
Bole	No	No	Yes
EMPDA	No	No	Yes

- (a) Not one of the Ethiopian printing enterprises surveyed had the technical capacity to complete the quantity of book printing required by the project within the time that an international contractor of the project actually achieved;
- (b) However, four Ethiopian enterprises (Berhane Selam, Branna, Bole, and EMPDA) had the potential to offer services comparable with those of the international printer, provided their equipment was upgraded; and
- (c) Of the above four enterprises, two enterprises were either already upgrading their equipment (EMPDA) or planning to do so in the near future (Branna).

The table above indicates that only one printer out of 9 that had been researched in Addis could print the required quantities in 4 colors (Berhane Selam) and that only one (Branna) could thread sew the signatures, whereas all were able to print covers and draw them on to the book block.

The study referred to above only considered local capacity to manufacture the required quantities of textbooks. However, there are three other characteristics that professional publishers take into account in their selection of a printer. These are:

- ▶ **Reliability**—can the printer be guaranteed to deliver on schedule?
- ▶ **Quality**—can the printer provide the required quality of manufacturing?
- ▶ **Price**—is the printer competitive in price?

In discussions with publishers who had surveyed local printing capacity in Ethiopia, the following conclusions were drawn:

- ▶ Reliable delivery dates for the large printing quantities specified in the bid documents could not be guaranteed by the Ethiopian printing sector.
- ▶ Quality printing from some printers was acceptable although there were ongoing questions about consistent binding quality when large quantities were involved. This is particularly an issue when so few printers have the plant or experience for thread sewn binding in large quantities.
- ▶ Better prices for reliable delivery and quality were available from a number of international printing sources in India and Malaysia among others.

Thus, publishers were more confident in using international printing sources rather than Ethiopian printing sources until more investment in color printing and thread sewn binding plant came on stream in Ethiopia.

³⁴ De Guzman, A. (2011). Reconnaissance of Textbook Printing Capacity in Addis Ababa.

As far as it could be ascertained, no studies had been undertaken on print factories in the regions, although one international publisher commented that there was a possible printer in Oromiya Region. However, the general consensus was that regional printing was unlikely to be better than printing facilities in Addis, and in some of the more remote regions printing facilities were likely to be unacceptable in quality for the standards required by the MOE. There is nothing to stop regions procuring their printing from Addis or from international sources, but this would rely on the availability in the regions of experienced production controllers capable of handling competitive printing procurement from different sources and ensuring the required quality levels on delivery.

Local printers have limited capacity in thread sewn binding and high quality cover finishing, which has an adverse impact on durability. In addition, their limited output capacity could only allow them to organize printing in sequence, which seriously limits the speed of output. They have limited access to foreign exchange to import paper and other printing materials as well as modern printing equipment. They are required to pay duty on the latter, while textbooks competitively printed offshore enter duty free under the United Nations protocol on the free flow of books and information.

The World Bank's procurement guidelines allow a 15% margin of preference to domestic suppliers in the evaluation of bids under ICB. The guidelines also allow an advance payment of up to 30% of the contract price for bids quoted in local currency. This is beneficial to local publishers which have difficulty in raising capital. In Ethiopia, however, these incentives do not seem to have improved the competitiveness of local firms. In contrast, international printing firms have several advantages. They have access to capital at reasonable interest rates, and they have access to advanced printing facilities. The latter allows them to organize printing in parallel, thus reducing the printing lead time. As stated above, they are not required to pay tax and duty on textbooks printed

overseas. In Ethiopia, the government covered these costs under GEQIP1.

4.3 Procurement

Regions are responsible for managing primary and secondary education, and for providing appropriate TLMs. Under GEQIP1, regions procured small print runs using NCB to meet the urgent needs of schools. Schools also purchased through national shopping some supplementary reading books and materials with their school grants. Otherwise, most of the textbooks and teachers' guides were procured through ICB. REBs delegated the MOE to handle long print run textbook procurement contracts on their behalf, as they did not have any previous experience of procurement up to international standards. Ethiopia's procurement system required the involvement of multiple directorates of the MOE (including Curriculum Development and Implementation, Procurement and Property Administration, Finance Administration, and Planning and Resource Mobilization, the state minister's office) and REBs. Weak coordination between the different directorates translated into slow decision making, contract delays, and contract disputes.

Central bulk procurement, particularly for secondary textbooks, was also believed to result in gains from economies of scale. However, procurement management within the MOE was problematic. MOE's procurement capacity was weak and there were difficulties in attracting, training, and retaining qualified procurement staff. The MOE complained that the Bank's procurement procedures were unnecessarily complex and cumbersome. The MOE's decision making at each stage of the procurement process was slow, which affected the pace of project implementation. Hence, high-level discussions between the World Bank and MOE's management were frequently needed to unlock key bottlenecks. Such challenges are likely to continue under GEQIP2.

Table 3: Book Procurement Process³⁵

Preparation for bidding	Procurement	Development (up to sign-off)	Printing	Shipping and distribution	Final payment and contract closure
3.6 months	7.6 months	11.7 months	3.2 months	3.8 months	6–12 months
From drafting of bid documents to receipt of WB no-objection	From issuance of bid invitation, through bid evaluation, Bank's no-objection, to contract signing	From contract signing to approval of page proofs for printing	From printing, binding, packaging, pre-shipment inspection to loading for shipment	From loading on ship, through customs clearance, overland distribution, to request for final payment	Checking of delivery, negotiation on liquidity damages if any, processing of payment

Note: contracts for printing and reprinting surprisingly took an average of about 13m from contract signing to distribution

The procurement timeframe was much slower than originally planned in project design. Table 3 illustrates the average time required for each stage of the procurement process.

Evaluation of bids involving development, printing, and distribution was done using a weighted system that incorporated quality criteria with price. The weight for the technical score was 70%, and 30% was allocated for price. Criteria for evaluation included conformity to the new curriculum, content, appropriateness of the language, preference for active learning strategies, provision of teaching guides, and effective design and illustrations. In order to help evaluators to apply quantitative measures, a checklist under each criterion was devised. For evaluation of bids involving printing and reprinting, price was the main consideration, carrying a score of 100%. In this case, technical evaluation was conducted to verify the responsiveness of bids to technical specifications and requirements, including quality of paper, cover, and binding, among others. On average, it took about 4.5 months to complete the evaluations. Most evaluation reports were not rigorous and did not follow the required procedures and criteria described in the bidding documents.³⁶

ICB attracted 8 firms on average for each bid. All bidders for ICB were foreign firms. 12 firms were successful in winning 31 contracts; although 2 firms dominated the market, winning 8 and 7 contracts respectively. Only two local firms collaborated with foreign firms to provide their services, mainly for providing and recruiting national authors as well as helping with clearance and distribution of book stocks.

In 2010, the MOE wanted more Ethiopian printing/publishing companies to benefit from the project contracts because this would enhance their capacity and make the provision of textbooks more sustainable. The World Bank thus undertook a survey on the capacity of local publishers/printers that concluded there to be no local firm capable of providing textbooks as per the required specifications, quantities, and delivery time.

In a follow-up interview, one of the bidders commented on the GEQIP1 procurement issues as follows:

- Clauses were inserted between the award of contract and contract signature. The contract issued with the bid document was unilaterally

³⁵ Woldetsadik, G. (2015). *Provision of teaching and learning materials in Ethiopia: Achievement and lessons learned under General Education Quality Improvement Project 1*. Washington, DC: World Bank.

³⁶ Ibid.

altered without discussion or agreement with the bidders.

- ▶ The first inserted clause transferred copyright to the MOE for five years (clause 18.1). The MOE used this to reprint the books despite the contract also stating that it ‘includes reprints’ (clause 32.3).
- ▶ The second inserted clause specified a delivery period of 21 weeks, which was plainly impossible to achieve (clause 12). The MOE was often unable even to provide feedback and approval on proofs until after the 147 days had expired.
- ▶ Payment of bidders’ invoices after delivery (the final 20%) were often very long delayed. The contracts were not well administered and letters to the World Bank did not produce fast resolution of problem.
- ▶ Some of the bids are reported to have been cancelled after contract award then re-advertised and re-awarded to different bidders.

Some foreign bidders will be reluctant to participate in future bids unless some of the procurement problems listed above are corrected. The World Bank recognizes that the procurement processes need to be improved but is aware that it will take time for local capacity to improve up to international standards.

4.4 Distribution

In Ethiopia, textbook stock procured via GEQIP is now delivered by publishers direct to 800 *woredas*. The 2010 EGRA study noted significant differences in local language textbook availability in different regions, with Tigray and Harar recording around 95% availability in schools but Somali recording only 43% availability. These data suggest that either distribution or school management might not be working as well in some regions as in others. It is well known that the district to school part of the distribution system is the most problematic operation in every SSA country. Governments typically underfund textbook distribution, particularly at the critical district to school level where storage and

delivery from districts to schools present common difficulties. Publishers supplying to *woredas* in Ethiopia reported initially that they had been assured by the MOE that there would be functioning store rooms and trained storekeepers in every *woreda* to accept deliveries, and publishers reported that in general they had no insurmountable problems in finding a *woreda* official to accept and sign for stock, although some of the more remote *woredas* were not easy to reach. One of the contracted publishers commented in a follow-up interview that the distribution exercise to the *woredas* was complicated and very expensive, but not impossible. The biggest problem was the MOE’s handling of the submitted files of proof-of-delivery documentation, which was described as very bureaucratic and the cause of long payment delays. It was suggested that it would have been better for the MOE to have distributed in Ethiopia by using the military which has the required vehicles, manpower, and access knowledge.

Follow-up interviews with the World Bank and the MOE confirmed that, in practice, the distribution of textbooks from *woredas* to schools faced several difficult challenges. First, while delivery of books to urban schools was relatively easy, delivery to rural schools was difficult due to inadequate finance available to *woredas* and the poor road infrastructure, thus prolonging the delivery period. Second, many rural schools can be very far from the nearest point that a track can reach. In such cases, books must be carried long distances on cycles, pack animals, or carried by people on foot. Third, the 2013 joint review mission (JRM) noted an inefficient allocation of textbooks and teachers’ guides among schools by *woredas*. There were shortages of books in some schools and surpluses in others.³⁷ This was due to inaccurate information about grade level and subject enrollments provided by schools via the education management information system (EMIS). In this context, REBs and *woredas* need to improve EMIS data collection and to design more efficient and effective ways of allocating and delivering textbooks to schools.

³⁷ Ibid.

There does not appear to be any accessible information on the effectiveness of the *woreda* storage and delivery systems. Similarly, there is no easily available information on school level systems and stock management. Inevitably there will be some loss and damage but there is no indication as to the actual or even estimated extent of the losses. However, GEQIP2 on the basis of the experience of GEQIP1, will allocate a loss and damage allowance of 8% per year as part of every print run.

The packing instructions contained in the bid documents make it clear that each publisher/printer is delivering bulk stock to each *woreda* so that each consignment of publisher cartons has to be broken down and re-packaged to create the stock allocations for each individual school. Not all titles will arrive at the same time, so schools may have to make several journeys to collect their allocated book stock. This is potentially expensive for poor schools in rural and remote locations and a possible cause of non-collection of allocated textbook stocks. It is important to assess how effectively these operations are managed by different *woredas*.

4.5 Teacher Training Issues

The most important teacher training needs recorded as a result of the analysis of the outcomes of GEQIP1 can be summarized as follows:³⁸

- ▶ School storage, TLM stock management, and stock conservation
- ▶ TLM usage techniques in the classroom
- ▶ Local language learning to enable teachers to use the newly developed local language and dominant language TLMs (many local language speakers cannot read and write their own mother tongues with any fluency because of the lack of books and other reading materials in these languages and the fact that these languages have rarely been taught)
- ▶ English language support to ensure adequate student language capacity to deal with learning after the transition from local language LOIs

At the *woreda* level the most important training needs are:

- ▶ The upgrading of EMIS data covering schools and grade level enrollments
- ▶ The management of *woreda* to school distribution
- ▶ Monitoring stock management, conservation, and TLM usage in schools

For the MOE, the most pressing TLM training related needs are:

- ▶ The streamlining of TLM procurement processes
- ▶ Improving *woreda* and school storage, particularly in primary schools in rural areas
- ▶ Improving the accuracy of national and *woreda* EMIS data

4.6 Financing

The MOE's decision to partially liberalize textbook provision through the use of national and international textbook publishers selected via competitive bidding has been judged by the MOE and the World Bank to be more efficient and effective than the previous system of public provision from EMPDA. Apart from improved quality and delivery performance, competition has driven prices down.

The average unit costs of textbooks and corresponding teachers' guides under GEQIP1 are shown in Table 4. The overall project unit cost for primary textbooks was 16% lower than the appraisal estimate. For secondary, the average unit cost was 20% lower than the average appraisal estimate. With an estimated book life of 4 years and a 1:1 textbook-student ratio, the annualized amortized unit cost of a primary and secondary textbook per student is about US\$0.30 and US\$0.44 respectively.

Prior to 2009, while the costs of textbooks were apparently low, the real costs were considerably higher due to hidden overhead costs and the amount of time that it was taking to deliver the books to the schools themselves. The lower costs of EMPDA

³⁸ Ibid.

Table 4: Textbook Costs³⁹

Textbooks	Average unit cost in US\$			
	New edition	Reprint	Overall	Project Estimate
Primary	1.47	0.60	1.17	1.36
Secondary	2.21	1.09	1.76	2.11

supplies also reflect the fact that minimum physical specifications were used. Furthermore, GEQIP1's ICR (2014) confirmed that these unit costs compared favorably with those of other East and Southern African countries.

For many years, government financing of TLMs had been inadequate. Non-salary recurrent costs accounted only for about 5% of annual education budgets. This was insufficient to cover the cost of adequate supplies of TLMs. GEQIP was designed to partially alleviate this problem through financing the provision of TLMs and providing operational discretionary grants to schools. GEQIP1 spent about US\$105 million to procure 78 million textbooks and teachers' guides between 2009 and 2013. With a textbook life of 4 years and a target 1:1 student-textbook ratio, the annual cost amounted to about US\$26 million. Between 2014 and 2018, GEQIP2 will spend about the same amount to replenish existing and new titles, at a ratio of 1:0.9, plus supplementary materials including reading books in local languages. The government has been lending textbooks to students in public primary and secondary schools without charge. This will continue at least until 2018. Students are normally required to return the books at the end of the school year or repay the full cost for lost or seriously damaged books. Some REBs made separate arrangements with publishers to print additional copies of materials for sale to private schools. By the end of GEQIP2 the MOE will need to develop sustainable financing mechanisms which are affordable and predictable for the provision of TLMs in order to avoid slipping back to the pre-GEQIP situation.

4.7 School Management and Usage

Textbooks are effective only if they are regularly used in classrooms, which appears to be a problem in Ethiopia. An exit survey of GEQIP1 (2013) reported that only 38% of students bring their textbooks to class. The 2013 JRM in three regions (Amhara, Gambella, and Somali) observed that many students share textbooks in classrooms. Subsequent DP/MOE joint visits to schools in other regions (Dire Dawa, Harari, Oromia, SNNP, and Tigray) also observed similar situations. First, in primary schools, only some students bring language and math textbooks to classrooms. Second, secondary students either don't bring their textbooks to classrooms or a group of five or so students bring different books to share among themselves. Third, girls seem to be better than boys at bringing their textbooks to class. Fourth, there are a few schools and teachers who insist/encourage their students to come with their books. One of the reasons given by the students is that it is too heavy to carry all the textbooks to school every day, particularly if they live far away from their school. Many parents also discourage students to take their textbooks to schools for fear of loss and damage for which they will have to pay.

GEQIP1 originally had plans for training teachers and principals in the effective use of textbooks, but this has not been fully implemented to date.

Many schools also don't have adequate storage to store the books. The problem is acute for primary schools in rural areas. It is critical that the REBs

³⁹ Ibid.

support schools in providing adequate storage facilities to prevent high levels of loss and damage of textbooks when they are not in use.

4.8 Digital Opportunities

The MOE uploaded 142 textbooks and teachers' guides at all grade levels and subjects in five languages (Amharic, English, Oromifa, Somali, and Tigrinya) on its website for easy access by the students, teachers, and other stakeholders within Ethiopia. However, their use was constrained by the lack of access to computers, limited access to a reliable power supply, and low-level connectivity to the internet, particularly in rural primary schools. In the short term, e-textbooks are unlikely to emerge as an alternative method to traditional print-based TLMs, and there do not seem to be any immediate possibilities for the use of digital reading materials on a national scale.

5. Discussion and Opportunities for a Global Book Fund

Ethiopia has made a major policy commitment to local language publishing for primary schools covering both major and minor languages. It has recognized the importance of TLM provision in achieving early literacy and upgrading student achievement and has worked with development partners to raise very substantial funds to reach an initial 1:1 textbook to pupil ratio. A four-year follow-up project is intended to consolidate current achievements and to ensure sustainability.

At the same time, literacy levels in most states—including in Addis—are very poor. One of the objectives of GEQIP2 is to increase the quantity and improve the quality and relevance of reading book provision in local languages. Under these circumstances, it seems likely that Ethiopia would welcome an active involvement in a GBF aimed at increasing the supply and effective use of local language reading books.

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Global Book Fund Country Study

HAITI

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1. Methodology

The Haiti country study was conducted by Ayiti Nexus, consultant for Results for Development Institute (R4D), over the course of September 2015 – January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

Data collection for the Haiti country study was performed via interviews with stakeholder groups using five different customized questionnaires (Appendix 4). The majority of stakeholder interviews were carried out in person. When these could not occur for logistical reasons, questionnaires were sent to respondents electronically via email. A complete list of stakeholder interviews is in Appendix 1. Additional details on the research background and methods can be found in Appendix 4.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background

Haiti is a peninsular portion of the Hispaniola Island located in the Caribbean Sea (Figure 1). It shares the geographical region with the country of Dominican Republic. Haiti's surface area is 27,750 km² and the estimated total population in 2013 is 10,911,819.⁴⁰ The average life expectancy is between 61 to 64 years.

Haiti has faced many obstacles to sustainable development due to its history of political turmoil stemming from the country's independence in 1804 to the present and records of subsequent natural

Figure 1: Map of Haiti



disasters that have weakened its already fragile infrastructure. The most notable recent natural disaster in Haiti was the 7.3 magnitude earthquake on January 12, 2010. Yet, almost six years since the event occurred, Haiti is showing promising signs of long-term development. For example, according to the World Bank,⁴¹ Haiti has moved from a state of recovery to being able to improve and strengthen institutions and to increase the quality of education, health, and other services in order to stimulate investment and economic growth. Some of the improvements include:

- ▶ Access to primary school (grades 1–6) has risen from 78 to 90 percent.
- ▶ The mortality rate for children ages 5 and under decreased by 11%.
- ▶ The percentage of extreme poverty has fallen from 31% to 24% over the last decade, especially in urban areas, and foremost in Port au Prince.

⁴⁰ World Health Organization. (2016). Haiti. Retrieved from <http://www.who.int/countries/hti/en/>

⁴¹ World Bank. (2016). Haiti Overview. Retrieved from <http://www.worldbank.org/en/country/haiti/overview>

- ▶ The tourism sector is growing, with several new hotels, and there has been an increase in international travelers by nearly 20% in the last couple of years.

However, despite improvements in development indicators, Haiti still lags behind many countries in the Caribbean and the world and is categorized as the poorest country in the western hemisphere.⁴² Much will need to be done, especially in the education sector, in order to eventually increase the per capita GDP growth, decrease the level of poverty, and improve the well-being of Haitians.

2.2 Educational context

Haiti's formal education system has four basic levels: pre-primary, fundamental (primary), secondary, and tertiary (includes vocational).⁴³ The 'fundamental level' which is divided in 3 cycles consists of grades 1 to 9. Although Haitian law and official policy consider all three cycles the necessary basic program, lack of steady attendance, over-age problems, and low availability of free programs severely affect children's capacity to reach grade 9 and more advanced levels. The 3 cycles of the fundamental level spans both the primary and secondary. According to the Ministry of Education's report on their 2011 inventory of schools, the public sector represents only 12% of the schools in Haiti, and 88% of the schools are privately run by religious organizations, non-profit groups, or for-profit individual enterprises.⁴⁴ The non-formal sector includes literacy and post-literacy initiatives for adults aged 15 and above.⁴⁵

Higher education is provided by the universities and other public and private institutions governed by

the Ministry of Education. The university system is composed currently of four or five private institutions in addition to the State University of Haiti. All higher education institutions are located in the capital city.⁴⁶

Success in school and graduation from high school are very difficult to achieve for Haitian children. This is evidenced by the fact that only 8% of the children who start school eventually graduate from high school, and only 3% graduate on time.⁴⁷ As a result, it is estimated that only 60%⁴⁸ of Haiti's population is literate—defined as the ability to read and write.

Many attribute the high rate of failure to the quality of education and to language barriers caused by the use of French even though both students and teachers lack fluency in this language. Indeed, the education system in Haiti was founded on the assumption that the language of instruction is French, but a 2009 study by USAID⁴⁹ showed that at the end of second grade, 49% of students could not read a single word of connected text in French or Creole.

Low primary to secondary transition rates in Haiti may also be due to high over-aged populations. A study of 35 countries suggests that there is a strong positive relationship between relative age-in-grade and dropout rates at the end of primary school.⁵⁰ More than 200,000 children from Haiti remain out of school, and several are too old for their grade level. Students who tend to be over-aged by two or more years have higher dropout rates. Already reaching a significant age, these children are faced with the decision to either continue with schooling or seek work in order to support their families.

⁴² World Bank. (2016). Data - Haiti. Retrieved from <http://data.worldbank.org/country/haiti>

⁴³ Ministry of Education. (2013). *Programme d'interventions prioritaires en education (PIPE) 2013-2016*. Retrieved from <http://www.globalpartnership.org/content/programmes-dinterventions-prioritaires-pipe-haiti-2013-2016>

⁴⁴ Ministry of Education. (2011). Retrieved MENFP.gouv.ht/ANNUAIRE%20_FOND_1_ET_2.pdf

⁴⁵ Ministry of Education. (2013). *Programme d'interventions prioritaires en education (PIPE) 2013-2016*. Retrieved from <http://www.globalpartnership.org/content/programmes-dinterventions-prioritaires-pipe-haiti-2013-2016>

⁴⁶ Ibid.

⁴⁷ UNESCO Institute for Statistics. (2016). Country Profiles. Retrieved from <http://www.uis.unesco.org/DataCentre/Pages/country-profile.aspx?code=HTI>

⁴⁸ Ibid.

⁴⁹ RTI International. (2011). The Early Grade Reading Assessment (EGRA) in Haiti. USAID. Retrieved from <https://www.eddataglobal.org/documents/index.cfm?fuseaction=pubDetail&ID=344>

⁵⁰ Sabates, R., Akyeampong, K., Westbrook, J., and Hunt, F. (2010). *School Drop out: Patterns, Causes, Changes and Policies*. Retrieved from <http://unesdoc.unesco.org/images/0019/001907/190771e.pdf>

Countries such as Bangladesh, Ethiopia, Senegal, and Haiti are in the process of improving their educational systems to reach out-of-school children at an earlier age by adopting methods of educational inclusion. In Haiti, educational inclusion has primarily focused on tuition waiver programs such as Education pour Tous (Education for All) sponsored by The World Bank and the Programme de scolarisation universelle gratuite et obligatoire (PSUGO) sponsored by the Haitian Government to increase educational access.⁵¹ These types of programs are important in increasing educational inclusion, as 80–90% of schools in Haiti are privately run by religious organizations, non-governmental organizations, or for-profit institutions.⁵² Out of 13,599⁵³ primary schools, 1,688 are public.⁵⁴ Likewise for secondary schools, out of 3,477⁵⁵ schools, 428 are public.⁵⁵ Therefore, they tend to charge tuition fees, which ultimately act as a barrier for many parents who have to also pay for transportation, books, and uniforms.

It is estimated that, on average, Haitian parents spend US\$130 per child every year to send their children to primary school.⁵⁶ With the per capita gross national income (GNI) at US\$820⁵⁷ per year, this constitutes a huge expenditure in the family's income. However, due to financial and technical support provided from the tuition waiver programs, enrollment rates for primary school have risen from 78% to 90%, enabling children to be in the grade that is appropriate for their age by starting school earlier and lowering dropout rates associated with financial problems.⁵⁸

2.3 Overview of the Language of Instruction (LOI) policy

Although Haiti became an independent nation in 1804, it was not until 1918 that a new constitution

made French the official national language. The constitution was changed in 1987 to include Creole as one of two official languages, acknowledging that Creole is the language that unites the people of Haiti. Although there are few official documents in Creole, the passport, national identification cards, and the constitution are all available in both languages. Currently, Haiti has seen a growing mix in the use of Creole, French, and English. Indeed, proximity and frequent exchanges with the United States are influencing common everyday language, and one needs frequently to know how to read in three languages.

In 1976, a large national and international education reform attempted to overcome the problems of language and quality with the creation of the Institut Pédagogique National (IPN). The IPN was to lead a reform commonly called the “Bernard Reform” which lasted 10 years. Among the major accomplishments of the Bernard Reform was a prescribed curriculum for grades 1–6 which included teaching in Creole in grades 1–4 with gradual transition into French.

Another important achievement was the legal recognition of one spelling for Creole. In 2014, an autonomous body of experts called the “Akademi Kreyòl” was appointed by the Haitian government to the task of furthering the development of the language and reinforcing the practices and standardization of Haitian Creole writing. Although there were many setbacks and many changes in the way the reform was implemented, Creole spelling is mostly standardized and the use of Creole in schools continues to be important.

Officially, the language of instruction in first grade is Creole. The MENFP modified the Bernard Reform recommendations in 1992 but maintained that children were to learn to read in Creole in first grade

⁵¹ MENFP. (2014). Mieux appréhender le PSUGO. Retrieved from <http://menfp.gouv.ht/psugo.htm>

⁵² World Bank. (2010). Our Goal: Education for All. Retrieved from <http://web.worldbank.org/WBSITE/EXTERNAL/COUNTRIES/LACEXT/0,,contentMDK:21896642~pagePK:146736~piPK:146830~theSitePK:258554,00.html>

⁵³ MENFP. (2011). *Annuaire 1ere et 2eme cycle*. Retrieved from http://menfp.gouv.ht/ANNUAIRE%20FOND_1_ET_2.pdf

⁵⁴ Ibid.

⁵⁵ MENFP. (2011). *Annuaire de 3eme cycle*. Retrieved from <http://menfp.gouv.ht/ANNUAIRE%203EME%20CYCLE%20ET%20SECONDAIRE.pdf>

⁵⁶ World Bank. (2015). *Four things you need to know about education in Haiti*. Retrieved from <http://www.worldbank.org/en/news/feature/2015/03/12/four-things-you-need-to-know-about-education-in-haiti>

⁵⁷ World Bank. (2016). Data – Haiti. Retrieved from <http://data.worldbank.org/country/haiti>

⁵⁸ MENFP. (2014). Mieux appréhender le PSUGO. Retrieved from <http://menfp.gouv.ht/psugo.htm>

with only oral instruction of French as a second language. Written French would be introduced in the second grade. Reading in Creole, however, was to continue as a course through the 9th grade. In practice, children are taught to read in both languages simultaneously. The majority of Haitian children attend preschool (76%), and reading in French is introduced in the five-year-old class.

In practice, private schools make a choice of the language they will use to teach reading. Some private schools, such as the Catholic boys' school Saint Louis de Gonzague, starts first grade reading instruction in Creole, as suggested by the MENFP. The transition to French is done at the end of first grade. However, since French mastery is associated with a higher social status and 80% to 90% of the schools are private, school owners and administrators respond to the clientele by using the language of higher social standing, even when it is a pedagogically poor choice. Many start with all books in French and do not introduce Creole until the fourth grade, a choice opposite to official recommendations. For the past 30 years, Creole reading was not officially tested until the end of the sixth grade. In 2014, the MENFP announced the elimination of the official sixth grade state exam and the introduction of new measures at the fourth grade level, including Creole and French reading.

Interviews with stakeholders suggest that in the majority of Haitian schools, reading is often associated with formal class lessons. Many Haitian teachers will attest that decoding instruction is done one letter at a time, with each child having a series of words to study at home. Teachers check the previous day's "lesson" every morning, and the child is allowed to flip through the next page of the book if his/her decoding is satisfactory. Reading comprehension exercises in grades 2–6 consist most often of short texts followed by questions where the answers are sentences found in the text—checking only recall, not inferences.

In many private schools, barring the elite schools, neither the teacher nor the students speak French. Reading instructions in French often include mispronunciations of letters and words because the sounds of French are not familiar. Learning how to read properly in French is a difficult task for the average Haitian school student because it lacks connection to everyday life and prior learning since the local language is Creole.

2.4 Print and Digital Reading Book Provision

Since adoption of the Millennium Development Goals (MDGs) set in 2000,⁵⁹ the MENFP has returned to work with donors and international NGOs focusing on reading in the native language, Creole. Various donors such as USAID, CARE, Inter-American Development Bank, World Bank, Save the Children, Caritas, and Plan International have included reading books in their various project initiatives, with the goal of improving the quality of education. For example, USAID has an ongoing project called *An n Aprann Li ak Ekri/Apprenons à Lire et à Ecrire* (AnnALE) offering a teaching method for reading in Creole and French for the first four years of schooling.⁶⁰ In accordance with the official policies, the USAID project offers reading instruction materials in Creole only in the first grade, with materials for teaching in oral French. In second to fourth grade, teaching materials will be offered in both languages. The MENFP considers the USAID project a government ministry project that adopts the national approach to teaching reading. This USAID project also requires that small classroom libraries be equipped with 100 Creole books and 50 French books in the primary grades.

The majority of books used in these projects are produced by Editions Deschamps in Haiti or Educa Vision in Florida, two Haitian publishers producing picture and story books for the primary levels. Ninety percent of Deschamps' inventory is in French, while

⁵⁹ United Nations. (2015). *The Millennium Development Goals Report*. Retrieved from [http://www.un.org/millenniumgoals/2015_MDG_Report/pdf/MDG 2015 rev \(July 1\).pdf](http://www.un.org/millenniumgoals/2015_MDG_Report/pdf/MDG%2015%20rev%20(July%201).pdf)

⁶⁰ A first phase was executed by RTI from 2012 to 2014. A new 4 school year project called Ann ALE was awarded to FHI360 in August 2015.

Educa Vision produces mostly Creole or multilingual books (including some in English, French, and Creole). Some projects use donated books from Canada and France, as Care does in its support to schools.

The reading book market has improved greatly in the last 10 years. There are four companies that supply a substantial number of books. The largest printing and editing company, Editions Deschamps, has established a section called EDITHA, focusing on the production of children's books. It offers titles written and illustrated in Haiti that are stored in small portable wooden boxes which open as bookshelves. The majority of the titles are in French, with about 10% in Creole. There are three other "large" children's book producers that compete with Deschamps in terms of quality of printing and number of titles – these are Educa Vision, Université Caraïbe, and Kopivité Laksyon Sosyal. Yet, among these, the publisher that has the most diverse market chain is Educa Vision, a Haitian-American publisher based in Florida. Educa Vision sells on Amazon in addition to direct sales. They have 1,000 titles and also offer a portable library with titles that are geared to different grade levels, including preschool, which include leisure stories and science content books. They are currently working on a periodical for children.

3. Current Print and Digital Reading Book Provision

3.1 Availability of Reading Books

Our findings revealed that there are up to 600 titles of reading books for children available in the two official languages in Haiti.⁶¹ There are also reference books, audio-digital games, and reading manipulatives (flash cards) available from publishers and distributors. Many of the children's reading books are available in the two official languages, and some publishers are even making books with texts in three languages (Haitian Creole, French, and English).

According to one of the donors interviewed, the availability of reading materials in schools is poor to

non-existent. Although titles may be available and materials fabricated, it does not necessarily reach the classrooms or the hands of the students. Consulted stakeholders noted that the MENFP has taken great steps in resolving challenges to make reading books available and accessible in the schools. Currently, the government is introducing at least three new intervention projects to increase literacy and to measure literacy to learning outcomes. The MENFP is also working with donors to hold contests and give prizes to upgrade authorship of local language initiatives.

3.2 Digital

Four out of six publishers consulted are already digitizing their reading books through the organizations A Connected Planet, Google Play, and Library for All. Some of them have up to 33% of their titles digitized. Interestingly, publishers remarked that most of the time, children prefer to have a book in their hands "for the feel of it," but that digitized material can still complement the use of handheld books. Indeed, the experience with the children using digitized materials has been positive due to its heightened learning features: animations, enhanced colors, sound, and user friendliness.

The digitized materials have been introduced sparingly, mostly in the US to school systems with large Haitian-American populations. Stakeholders noted that the key obstacle is not so much the cost of the digital books but the cost associated with obtaining related digital devices (smart phones, laptops, tablets) and maintaining the service and energy necessary to use them. Indeed, these books are only accessible to children who have access to technology. Electrical infrastructure in the schools is limited and does not allow for much technological hardware. Some of the technology that has been introduced into the schools by donors are smart boards, laptops, and locally made tablets. Yet developing a method for sustainable energy to keep the digital devices powered has yet to be addressed at the school level and at the student household level.

⁶¹ Many of the books printed abroad are automatically in two or three languages (English, French, Creole).

4. Country Findings and Market Gaps

Country findings based on our consultations with stakeholders are shared below.

4.1 Publishing

Overview

Six publishing companies were interviewed in this case study, four of whom publish children's story books.⁶² First, it should be noted that the publishing industry in Haiti is recent: the oldest of the six companies has only been in existence for 73 years while the youngest is only five years old. Out of these six companies, five are local (registered as Haitian companies) and one is considered an international company based out of Florida. Three of them primarily focus on education and children's reading and textbooks, specifically, while the remaining three focus on a diverse array of books and reading materials.

In most cases, publishers "purchase" stories and images from local and international writers and illustrators to avoid having to keep track of sales and paying royalties. Purchase prices quoted varied between US\$100 and US\$1,000 for a story and US\$25 to US\$80 for an illustration. The authors write for the love of writing and are happy to receive some compensation. The illustrators, on the other hand, have a hard time finding jobs in their field and are therefore much more affordable. One of the six publishers interviewed stated that it frequently pays royalties which represent 8–10% of overall production costs. The other publisher tends to rely on in-house employees to write and illustrate the books. Some writers use self-publishing mechanisms found online for printing and for private marketing. One publisher translates content purchased in English and publishes multilingual books in French, English, Creole, Spanish, and Portuguese. Two other Haiti-based publishers are adopting bilingual or trilingual

printings to widen the appeal of the books and extend readership.

On average, a book costs US\$2–\$6.⁶³ But with a population that earns an average of US\$2.42 a day, books remain largely unaffordable.

Constraints

During interviews, the majority of publishers have identified that the main constraint for commercializing reading books in the local language is the cultural stigma surrounding the "academization" of the Haitian-Creole language. In the past, the MENFP did not validate materials in Haitian-Creole; however, there is more support lately for the idiom. Although stigmatization towards Haitian-Creole is now gradually being surpassed, broadly the population still does not favor pedagogy in Haitian-Creole. Middle class and rich Haitians tend to send children to French and English speaking schools therefore reinforcing the pervasive belief that quality education cannot be granted in Creole.

Interviews with stakeholders suggest that stigmatization towards Haitian-Creole and the low purchasing power of target consumers are the two major factors explaining the modest sales of early childhood reading books. With individual consumers representing an unpromising market for early childhood education (ECE) books, the MENFP remains the largest consumer of local language materials for distribution to public schools. However, stakeholders consulted note that the volume ordered is still not significant enough to impact the retail price of books.

Opportunities

To increase market sales and awareness, publishing companies have become members of academic and socio-cultural associations where they can share their books and materials. They also participate in book fairs, conferences, and social events to market their books in Haitian-Creole. Some publishers claimed

⁶² Their names are kept confidential for data protection purposes.

⁶³ Production costs vary by publisher. For example, according to a prominent publishing house, the percentage breakdown for the cost of producing a reading book is as follows: Authorship/Translation (8%), Art Work (4%), Design and Layout (15%), Manufacturing and raw materials (35%), Publisher overhead (15%), and Book seller discount (10%).

that as the majority of young children have not developed stigmas toward the local language, reading books in Haitian–Creole are desired by them; however their parents may object to instruction in the local language. Two publishers mentioned that facilitating the acquisition of local language reading books by the consumers through different forms of government and donor subsidies and other forms of incentives would help to increase sales.

4.2 Printing

Overview

Five of the six publishers print their materials in-house; one of the publishers has also established a separate printing company. There are two approaches to printing: on-demand and multiple copies (which requires storage). One US-based publisher and one Haiti-based publisher rely on on-demand printing of small quantities, which they believe to be more cost-effective as it decreases waste and storage costs. When making larger runs, storage is a problem, with the threat of loss caused by humidity and insects.

To make the cost affordable, minimum runs are of at least 1,000 books. Larger printers estimate that runs of 5,000 to 10,000 would allow considerably lower prices for consumers. Full color is preferred for illustrated books. To save on cost, and to lower the retail price, printers and publishers tend to use soft covers (paper) instead of printing hard cover books. Locally produced hardcover books are practically nonexistent.

Constraints

The printing and publishing companies that print in-house have noted that maintenance of the printing equipment is the most costly factor in the production process and directly influences the retail prices of books. The issue of high costs for maintaining the equipment is true for both the US-based publisher and the publishers and printers in Haiti; albeit in Haiti, US-based printers such as Educa Vision mentioned the cost advantages found in the US where equipment

can be leased instead of purchased and can also be serviced on the lease contract. The Haiti-based printer must purchase equipment and either run the risk of using poorly trained local service staff or pay for international technicians to come to Haiti for service.

Further, technology is limited, access to quality printers is very expensive, and the equipment is taxed much higher. For example, the technology does not exist in Haiti for printing hardcover books, and color printing is often done overseas where it is generally cheaper to produce high-end products such as coffee table books.⁶⁴

Raw materials in general for Haiti-based printers and publishers are taxed at 60%. It should be noted that there is no access to credit and technical expertise is hard to find. Paper for printing is an imported product, not fabricated in Haiti, that can be bought locally from vendors. Import taxes are high on paper as for other raw materials, making locally produced books cost prohibitive in comparison to imported books which are not taxed at customs.

Opportunities

The US-based publisher has access to 30-day printing credit which facilitates the printing of large orders in a short amount of time, acquiring the capital from the turnover necessary to pay back the credit issuer within the designated time frame. In a similar fashion, the creation of a credit line in Haiti, or a cash advance system, prior to the academic season could give the Haiti-based publishers and printers the necessary lead time and incentives to be able to produce mass quantities of supplies and market their products. A specific component of the Global Book Fund could be dedicated to assisting publishers and printers in producing a reasonable quantity of reading and textbooks prior to the start of school and to employ the proper marketing strategies to secure economies of scale. In working closely with the government, the stakeholders can negotiate tax breaks for importing raw materials for the local production of books and supplementary materials.

⁶⁴ Important to note that one of the higher quality color printing companies did not want to take part in the study.

4.3 Procurement

Overview

Haiti's Ministère de l'Éducation Nationale et de la Formation Professionnelle (Ministry of National Education and Professional Training, or MENFP) has designated committees representing the departments of early childhood, primary, and secondary levels to assist in the selection of books. Each year, the MENFP's committees convene to produce an inventory of recommended books to be used in the classroom and for supplementary reading. Yet, evidence shows that there is little communication and collaboration within the government, for instance, between the MENFP and MOC, and virtually no participation of external stakeholders involved in the country's book supply chain (even donors) in the book selection process. Unsurprisingly, the lists are comprised predominantly of books written in French, which evidently increases the sales for books written in this idiom in detriment of Haitian-Creole books. To illustrate the case in point, one of the publishers interviewed as part of this study stated that books written in Haitian-Creole represent roughly 10% of their sales; a bookstore representative puts the figure at around 1% of the store's overall sales.

The MENFP, however, welcomes propositions from schools regarding which materials to purchase. Publishers have worked as consultants for the MENFP to propose and submit titles for purchase. Based on availability of funds, the MENFP tries to respond to school demands. Every year, publishing companies are given a book order and assigned a total amount of money for the upcoming school year. The MENFP has two ways of purchasing. One is called "*dotation*" which involves the provision of completely free books to public schools;⁶⁵ the other is called "*subvention*" whereby they pay 70% of the production costs and books are sold to schools and families at a reduced price. The MENFP-subsidized books carry a stamp

indicating that 70% of the cost of printing was covered by the government. Parents go to stores to purchase their children's books for private schools and for certain public schools that do not benefit from "*dotation*."

However, a 2011 audit by the General Inspectorate of the Ministry of Finance (Inspection Générale des Finances, or IGF) found that while over 2.5 million books were purchased by the MENFP, only 19% of a sample of public schools had actually received any books.⁶⁶ The 2011 audit showed that approximately 66% of the textbook program budget went to subsidizing books while the remaining 34% went to providing free books.⁶⁷ IGF concludes that the textbook program lacks a clear policy under which to operate (including criteria for targeting beneficiaries or requirements to return free books) and that management of the textbook program is insufficient, with little documentation available to show that books were ultimately given or sold at subsidized prices to students.⁶⁸

Constraints

Five of the six publishers engaged in the survey feel that the method of procurement used by the MOE is highly biased toward one specific local publisher. They believe the system is largely non-transparent and that there is no standard practice in place to assure fairness in the selection process.

Also noteworthy is the lack of a standard budgeting practice at the government level to assure and allocate adequate funds for the purchase of reading materials and textbooks for all children in the public schools. The MENFP relies heavily on donor support to alleviate budget constraints and increase supply. The MENFP's budget is 17.3% of Government of Haiti's (GOH) budget for the 2015–2016 period, equivalent to 21,195,232,050 gourdes.

⁶⁵ As previously mentioned, not all public schools receive their share of free books.

⁶⁶ Ministry of Economy and Finance (MEF), Inspectorate General of Finances. (2012). *Audit du Programme de Subvention et de Dotation de Manuels Scolaires 2009–2010*, Rapport Final. Port au Prince, Haiti: MEF.

⁶⁷ Ibid.

⁶⁸ World Bank. (2015). *Republic of Haiti: Towards Greater Fiscal Sustainability and Equity: A Discussion of Public Finance*. Retrieved from http://www-wds.worldbank.org/external/default/WDSPContentServer/WDSP/IB/2015/09/01/090224b0830adf54/1_0/Rendered/PDF/Haiti000Toward00no0ofpublicofinance.pdf

Opportunities

The selection of textbooks and reading materials is not varied. Budget constraints and bias toward one major publisher in detriment of other publishing companies result in a procurement method that is neither extensive nor transparent. Both the MENFP and the MOC do not have a focus on ECE or recommended titles for early childhood learning. Yet, with the onset of the new curriculum for early childhood education launched in October 2015, the procurement method can diversify its method of selection with the solicitation of curriculum focused on reading materials allowing for a larger market pool of vendors.

4.4 Distribution

Overview

Textbook sales represent, on average, 60% of publishers' business. The MENFP is the biggest purchaser of children's books, with a big portion of its budget being allocated for subsidizing textbooks. When purchases are made by the MENFP, international donors tend to pay for the transportation costs associated with distribution of the materials. Without help from the donor community, it would be very hard for the MENFP to distribute books throughout the country, due to shortage of funds.

In addition to supplying books to the MENFP, the three local publishers who publish children's story books usually distribute books through local bookstores or their own brand bookstores. Book fairs are very popular retail outlets for families as well as schools. As far as online platforms, the publishers use their own website for online purchases. They also use international platforms for distribution, such as Amazon.

The cost structure for sales and distribution for the private sector is 32% for the publisher, 20% for the bookseller, and 12% for the distribution services. The distributors usually mark up the price of the books obtained from the publisher by an average of 20%. The publishers usually set their discounted price of books for distributors at 20% to 40% based on the quantity ordered.

Constraints

There are very few retailers for trade books in Haiti, and they are mostly concentrated in the metropolitan capital region. Only one of the two stakeholders interviewed falls into the category of distributor that focuses exclusively on distribution of books. There are bookstores and other outlets, including some bookstores directly associated with the publishers. In most instances, publishers will deliver to the purchaser (NGO or MOE) for large orders, and the distribution is organized internally within the operating structure of the organization. This is, in part, the main reason why stakeholders were not able to provide an exact cost or average cost for distributing books or cost of delivery in the country, as the organizations handle the distribution internally and prices fluctuate based on distance, amount, and road conditions. For example, Library for All Haiti uses their own application platform to distribute supplementary reading materials. CARE also distributes books internally, using their own in-house systems.

Opportunity

The reading books for children are typically donated by organizations such as CARE, PLAN, Save the Children, and USAID and are distributed by those organizations in conjunction with the GOH. Therefore, there is already a long history within the educational system of collaboration with donors to provide textbooks and reading books to school age children. As such, it seems that a relatively well-structured platform already exists in Haiti for the distribution of these resources countrywide. The Global Book Fund could work directly with the GOH to assure delivery of materials and further work with the GOH and donors to formulate a structured monitoring plan for tracking demand, supply, and distribution. Currently, no book tracking system exists.

4.5 Financing

Overview

According to the publishers, financing is a major roadblock to the fabrication of books, especially

amongst the small-sized publishers. As noted earlier, the incipient market and irregular demand for ECE books in Haiti compels publishers to print on demand to save on storage costs. Those who do not print on demand spend excessive amounts on storage when books don't sell and at times lose their books to humidity and insects.

Constraints

The publishers reported having cash constraints and needing subsidies to print and market books, especially those written in Haitian-Creole, in order to meet economies of scale. Most publishers and printers interviewed for this study had difficulty providing exact cost/expenses by a percentage breakdown. However, when asked, all locally based publishers concur that the acquisition of raw materials is their driving cost. One cited that their biggest cost driver was manufacturing and raw materials, accounting for 35% of the total retail price of reading books. On the other hand, a US-based publisher relays that the translation of textbooks into Haitian-Creole is its highest cost.

Opportunities

The publishers have already outlined the roadblocks in producing reading books and materials. These include the high tax on raw materials, issues with storage and damage, low demand for books due to low purchasing power and the stigma related to the Creole language, and lastly appropriating the right marketing tools to sell books to a larger public. The Global Book Fund can work with the GOH to assess the viability of creating an incentive and credit system for publishers in Haiti to stimulate the local reading book industry.

4.6 Supply and Demand

Overview

As discussed previously, there is a stigma towards the Creole language in Haiti, which negatively affects the quantity of reading books published in

the national language. There are even fewer reading books in the local language that are culturally appropriate for children. Authors who could publish in Haitian-Creole do not have an incentive to do so because there is a limited market demand for such books. Short-run printing keeps the cost of production high, discouraging children who would like to purchase reading books written in Haitian-Creole with their parents or school, especially in the rural areas, because these books are not affordable. To increase market demand, the donors, publishers, and implementers have organized and implemented a series of social events aimed at stimulating the habit of reading, such as reading summer camps, reading tournaments, and fairs scheduled at schools, conferences, churches, etc., that encourage reading and the use of Creole language texts in general.

Constraints

Throughout the country, books in schools and a pedagogy that is children-focused and tied to learning outcomes that allow one to measure children's literacy rate are clearly lacking. Indeed, many schools and communities do not have libraries, usually do not practice reading tests, and the current curriculum does not encourage the practice of independent reading; reading is textbook-focused. The reality in Haiti is that there is not a culture of reading for leisure.

Opportunities

Interviewed publishers detailed that children's books make up on average 65% of their titles. Therefore, children books can be made accessible through increased production and distribution. There is an underlying value and desire to continue to produce culturally appropriate children books, especially in the local language. Publishers could sell more children's books, especially in the local language, if they drafted and implemented more invigorating marketing plans, as the supply already exists and the demand can be increased through awareness, training, and effective marketing strategies.

4.7 Demand and Utilization

Overview

According to research, the majority of schools do not have libraries, and currently there is no government-led initiative to promote or encourage the establishment of libraries in schools. There have been several NGO-based initiatives to establish small school libraries, but evidence shows that schools also need support to ensure that teachers and students use the books. Two public schools visited near the capital for the purposes of this study showed different scenarios. In the first, reading books donated by PLAN International were stacked in the principal's office in bags and in a bookshelf with glass doors. The principal said that he lacked the qualified staff to ensure the proper usage of the books. In the second school, the principal explained that elementary school staff had received adequate training in the use of storybooks from the French government at the time of the donation. As a result, book exchange times are scheduled.

Home reading seems to be restricted to very few families or restricted to religious books. Illiteracy and poor electricity supply at the household level, especially in rural areas, may also be major impediments to the culture of reading. It is worth noting that there is an oral tradition of storytelling across generations in the homes and during family events.

Constraints

Lending libraries are scarce, both in schools and in community centers. Data collected from the four schools interviewed have reported that children read as few as 6 hours and as many as 16 hours in class per month.⁶⁹ When books are donated to schools, they are often stored in the principal's office or in a storage room and create a management issue for principals who have virtually no experience operating a borrowing system. Schools tend not to provide access to teachers and children to donated materials because they fear that the books may get dirty, damaged, or

stolen. Another shortfall is the fact that most schools do not have, and cannot afford, librarians on staff.

The donors, government stakeholders, and implementers note that follow up visits are necessary to monitor the distribution and use of books. The MENFP, CARE, and USAID also recommend that teacher training accompany the acquisition of the books. Teachers should also be trained in methods for engaging students and integrating reading books into their pedagogy. In addition to training, one of the school principals interviewed mentioned giving a financial incentive to one or more teachers on staff to manage the libraries.

Opportunities

Providing training seminars to families, teachers, and school administration can increase demand and improve the utilization of books. Since families still carry an oral tradition of storytelling and teachers typically read to children in class, they would highly benefit from capacity development activities such as community trainings on literacy and reading. The results from the study depict that there is not much happening in terms of training for teachers or school administration or community trainings for parents who are, in fact, their children's first teachers prior to entering school. A robust training framework would also allow for monitoring the frequency of use of local language books in the home and school. Additionally, the school administration would benefit from learning how to care for books, the importance of making donated books accessible, and establishing an effective lending system and library within the school.

4.8 National Policies and Regulations

Overview

The stakeholders commented that the taxation of raw materials, cultural biases towards the local language, and poor distribution channels represent the major obstacles for an effective book supply chain in Haiti. The Haitian government has lifted the customs tax for all imported books, yet this does not really lower

⁶⁹ Data from implementer and school interviews.

the overall cost of sale and creates a situation that is even more detrimental to the local book industry. As the locally printed books require material and equipment (printers, paper, ink, etc.) that are imported from abroad and that are heavily taxed by customs, the overall price of book production in Haiti is high and, ultimately, Haiti-printed books turn out to be less competitive than imported books.

Constraints

Due to government regulation demanding that all children entering public school receive free textbooks, the MOE does supply textbooks to children – primarily to preschool through 4th grade. However, policy coverage is limited, and priority is given to certain public schools because supply and funding is limited. There are unconfirmed rumors of corruption in the distribution system. When asked about corruption in the system, there were no clear responses from interviewees. Some publishers said that the ministry automatically pays only 80% of the quoted price and that their religious and moral convictions kept them from attaining high sales.

Another major shortfall affecting national policies and regulations is budgeting. The MENFP and the MOC do not have an earmarked budget line dedicated to children's reading books in national budgets. The small budget covering early childhood reading books is negotiated by the MENFP and funded primarily by international donors.

Opportunities

Other than the high taxes imposed by the government on raw materials, the government does not impede external aid to contribute to overall book distribution or impede the competition of books imported from abroad. The publishers generally said that high taxes on raw materials and machinery and low taxes on imported books created an impediment to growth. Therefore, the Global Book Fund can have an equal advantage amongst other donors and intervention programs in facilitating access to reading books for children in Haiti by purchasing books in large quantities locally and abroad.

5. Discussion and Opportunities for a Global Book Fund

Haiti remains a country that is struggling with educational inclusion. Accessibility to quality education nationwide is still a major factor in bettering child school attendance rate and literacy rates. Unfortunately, the educational materials required to enhance instruction at home and at the school are lacking due to lack of funds (impoverished society) and also the lack of emphasis on education when it comes to appropriation of the national budget, especially for early childhood learning. Though the reading books market undoubtedly faces some challenges in Haiti, findings of this case study reveal that there are interesting trends and opportunities for the growth of both print and digital publishing sectors.

The Global Book Fund (GBF) can serve the country of Haiti in at least six major ways as it provides accessibility to reading books to school age children in grades pre-school through 3:

- 1) **Subsidize reading materials.** The GBF can work with publishers to provide reading books at a lower cost to schools by having these stakeholders submit a capacity-building plan which the GBF can sponsor for a period of time to help the publishers find innovative ways to advocate for the use of local language materials and to develop marketing plans. Subsidizing reading books would help the MENFP further implement its constitutional duties to provide reading books to all school age children. Since the MENFP already has an effective national distribution platform, they would serve as great partners to reach a larger population. Hence the main goal is to provide every child access to a reading book, regardless of geographic or socio-economic status.
- 2) **Establish learning outcomes (nationwide).** The GBF should support operating staff that is able to liaise with the stakeholders to actively translate the initiatives of the GBF into key learning outcomes. A monitoring and evaluation plan

should be at the seat of the assistance delivered to the stakeholders in order to measure impact. Measuring student learning achievement for the purpose of improving learning outside a government benchmark or an intervention program is still at an infancy stage in Haiti.

3) Increasing quality, monitoring delivery and usage.

The GBF can assist the stakeholders in increasing the quality of reading books once public awareness and knowledge of use of such materials increase nationwide. The new market created can provide important feedback to stakeholders on the types of reading books that are found to be useful to students and that have effective learning impacts in literacy. Hence, the logistical framework needed to obtain feedback from schools, implementers, and other stakeholders can also serve as a platform to monitor delivery and usage of donated and/or purchased books.

4) Provide training to teachers, school administrators, and community.

Teachers, school administrators, and the community need to be trained in using reading books to assure that their level of comprehension is attained prior to reading or teaching literacy to the children. All of the stakeholders have stressed the importance of conducting in-service training to teachers, administrators, and the community each year prior to the opening of schools. Stakeholders have also noted that not all teachers are certified or have an advanced educational attainment. Hence when reading children's books, the explicit may be understood, but the implicitness of the story may not be understood, thus requiring student and teacher ability to pull information from the text and pictures, etc.

5) Incorporating technology in the classroom.

The GBF can encourage the emphasis of building and maintaining technological infrastructure in the schools and even in the household. The GBF should establish several requests for proposals for

schools to receive assistance in the digitization of their school materials. In order to obtain such assistance, a minimum school infrastructure should be attained. In reality, the MENFP does not provide schools with a yearly operating budget other than the basic teaching salary and, in rare cases, assistance with materials. As previously mentioned, 80%⁷⁰ of the schooling is private, with opportunities to fill the gap for operational costs. These schools over the years have found creative ways to operate through fundraising and soliciting assistances from donors. It is a challenging request for schools to meet the minimum requirements for digitization (electricity, computer, laptops, etc.), but it is not recommended to invest in schools that are unable to do so in order to avoid waste and promote sustainable practices.

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7. Appendix

7.1 Appendix 1: Interview List

	Organization	Type	Primary Contact
1	UNICEF Haiti	Donor	Beatrice Malbranche, Chef Pôle Survie & Développement Enfant bmalebranche@unicef.org
2	USAID Haiti	Donor	Fabiola Lopez-Minatchy, Education Advisor and M&E Specialist flopez-minatchy@usaid.gov
3	A Connected Planet www.aconnectedplanet.org	Implementer/ NGO	Greg Hearn, Senior ICT Advisor, greg@aconnectedplanet.org
4	Fondation Tipa Tipa	Implementer/ NGO	Dominique Hudicourt, Director tipatipa@hainet.net
5	CARE-Haiti (Partners in Education)	Implementer/ NGO	Monique Manigat, monique.manigat@care.org
6	Knowledge and Freedom Foundation (FOKAL)	Implementer/ NGO	Elizabethe Pierre-Louis, epierrelouis@fokal.org
7	Library for All	Implementer/ NGO	Françoise Thybulle, info@libraryforall.org
7a	Library for All	Implementer/ NGO	Rico Mondesir, rico@libraryforall.org
8	College Adventiste de Petion-Ville (Private School)	School	Director Herby Jean Baptiste collegeadventistecapv@yahoo.fr
9	Ecole Acacia (Private School)	School	Caroline Hudicourt, carolinehudicourt@yahoo.fr
10	EFACAP de Kenscoff (Public School)	School	Director Edgard Bernardeau and Patrick Jean-Jacques
11	Ecole Nationale de Freres (Public School)	School	
12	Lekol Kominote Matenwa	School	Chris Low, Executive Director matenwa1@gmail.com
13	Akademi Kreyol Ayisyen	Policymaker/ Regulator	Luna Gourgé, General Secretary lugour26@yahoo.fr
13a	Ministry Of Education and Professional Training	Policymaker	Marie Yolaine Vandal, Director marieyolaine.vandal@menfp.gouv.ht
14	Ministry Of Education and Professional Training	Policymaker	Pierre CENATUS, Director of Curriculum and Quality, cenapie@gmail.com Chantal Roques, roqueschantal@yahoo.fr Volvick CHARLES, volgcharles2004@yahoo.fr
15	Direction Nationale du Livre	Policymaker	Frantz Carly Jean Michel, General Director frantzcary@hotmail.com;

15a	Editions Henri Deschamps	Publisher/ Bookstore	Maël Fouchard, General Manager mael_fouchard@yahoo.com
16	Editions Henri Deschamps	Publisher/ Bookstore	Peter Frisch
17	Editions Zemes Haiti	Publisher	Charles Tardieu info@areytos.com
18	Educa Vision www.educavision.com	Publisher	Féquiere Vilsaint, Owner educa@aol.com 2725 NW 19th Street Pompano Beach, FL 33069
19	Kopivit L'Action Sociale	Publisher	Gerard-Marie Tardieu, Director gmt@kopivit.com
20	Université Caraïbes	Publisher	Jocelyne Trouillot-Levi, President jotrouillot@yahoo.com
21	Communication Plus	Publisher/ Distributer	Anais Chavenet complusa@yahoo.com
22	La Pleiade	Publisher/ Bookstore	Monique Lafontant, Owner librairie_lapleiade@yahoo.fr
23	Imprimerie Deschamps	Printer/ Publisher	Chantal Guilliod, cdguilliod@hotmail.com
24	Imprimerie Eglise Méthodiste	Printer/ Bookstore	Edzaire Paul, Director Edzairep@hotmail.com

7.2 Appendix 2: Basic Country Indicators

Category	Data
Surface area	27,750 km ²
Population	10,911,819 estimated inhabitants in 2012
PIB / GDP	8,713,000,000 dollars
Currency	Haitian Gourdes
Access to electricity	25% in 2012
Telephone service penetration	62% en 2012
Annual population growth rate	1.3% in 2014
Preschool student enrollment	544,474 in 2011
Primary school enrollment	13,599 in 2011
Number of public preschools	601 in 2011
Number of private preschools	8,754 in 2011
Number of primary schools	9,355 in 2011
Number of secondary schools	3,477 in 2011
Literacy rate	70%
Official languages	Haitian Creole and French
State Tax	0.1

7.3 Appendix 3: Key Acronyms

ECE	Early Childhood Education
GBF	Global Book Fund
GOH	Government of Haiti
IGF	Inspection Générale des Finances
INP	Institut pédagogique national
MENFP	Ministry of Education and Professional Training
MOC	Ministry of Culture
MOE	Ministry of Education
PAP	Port-au-Prince
R4D	Results for Development
SRM	Supplementary Reading Materials

7.4 Appendix 4: Details of Research Tools and Methods.

Background:

In order to conduct the case study in Haiti, R4D subcontracted the consulting firm Ayiti Nexus to perform a market assessment that will help to draw a picture of the value chain of primary grade reading books in Haiti and support decision-making around the establishment of a Global Book Fund. As part of the contract, Ayiti Nexus hired five consultants to collect and analyze the data and to draft interim and final reports. Data was collected through review of secondary sources (desk-based research) and directly through stakeholder interviews.

Target Participants

The participants of the study were identified as being key stakeholders in the supply value chain of reading books in Haiti. Based on their primary roles and functions in Haiti, the stakeholders were divided into five categories: Donors, Implementers, Policymakers, Publishers, and Printers. The Donors

are the organizations that finance reading books and interventions. The Implementers are entities, primarily schools, that use reading books in their program curriculum. The Policymakers are classified as government entities that make or impact policy on education and literacy in the country. In the case of Haiti, these stakeholders were subdivisions and/or structures of the Ministry of Education and Professional Training (MENFP) and the Ministry of Culture (MOC).⁷¹ The Publishers are the companies or organizations that publish, author, and/or distribute reading books in the country. The Printers are the companies and/or organizations that print authored materials for publishing and distribution.

At the end of the data collection process, a total of 24 stakeholders were engaged across the following categories: donors (2), implementers (9), policymakers (3), publishers (8), and printers (2). There was one bookstore that was categorized as a “Publisher” as they work closely with publishers.

Tools

Ayiti Nexus used a set of questionnaires developed by R4D geared toward stakeholders that have an active field presence in Haiti. Under this category, five different questionnaires were used, one for each specific stakeholder audience (donors, implementers, policymakers, publishers, and printers).

Differentiating in length and content, the questionnaires (Table 1) were broadly comprised of the same common themes: overview and background, supply and availability, demand and utilization, distribution, national policy and regulation, quality and monitoring practices, finances and digital relevance. Questionnaire length ranged from 45 to 100 questions.

The market analysis that assesses the viability of starting a global book fund in Haiti is measured by seven variables, as stated above, as well as other confounding variables (themes) that have surfaced

⁷¹ The MENFP budgets funds for purchases of textbooks and guides donors and non-profit organizations in the creation of small school and classroom libraries. The MOC is in charge of public libraries and the office of the Direction Nationale du Livre (National Directorate for Books).

Table 5: Description of measure for questionnaire constructs content

Questionnaire Constructs (variables)	Description of Measure
Overview and background	Focused on the nature of existence of the stakeholder, their interventions in the country, overall challenges, reports and evaluations conducted
Supply and availability	Measures the perceived level of availability of SRMs in the country and stakeholders' level of participation in increasing supply and accessibility
Demand and utilization	Evaluates the level of demand for SRMs in the country and the activities (locally or nationally) that increase demand and utilization of SRMs
Distribution	Procurement documentation contains basic specifications, pricing policies, print runs, and evaluation methodologies and instruments
National policy and regulation	Monitors and evaluates the regulatory practices at the government level that hinder or encourage reading, and supply value chain of SRMs
Quality and monitoring practices	Focuses on the quality assurance of SRMs printing, publishing, longevity; investigates the methods used to assure books get to the classroom and if learning outcomes are tied to student use of SRMs
Finances	Details the funding streams, the funding gaps, and other pooling of resources in the purchasing and distribution of SRMs
Digital relevance	Surveys the usage of digital materials, digital markets use, infrastructure to support usage of digital materials, and preference over paperback material

during the data collection and analysis process undertaken by Ayiti Nexus.

As this is a primarily qualitative study, instruments were not tested for reliability, yet the questionnaires incurred slight adjustments from Ayiti Nexus' consultants while being rolled out in Haiti, so that the wording and content could be adapted to the contextual reality of the country's book industry. This measure helped to increase accuracy and validity of the tools. The instrument was translated by a consultant for R4D from English to French; the translation was approved by a Senior Consultant at Ayiti Nexus prior to roll out.

Process & Procedures

Data collection was performed throughout the months of September–October 2015. Once interviews were completed and documents were reviewed, information was analyzed by Ayiti Nexus consultants.

In Activity 1: **Desk review** – Stakeholders that met the participation criteria of the study (see section

1 on Participants) were identified using common knowledge of the country context and online sources to establish a participant database. In this phase, 50 stakeholders were identified as being potential targets for the study. Subsequently, and as the MOE was considered a key stakeholder in the study, a preliminary meeting was scheduled with the MENFP to obtain the National Curriculum on Early Childhood and to identify key personnel to be interviewed. Next, an analysis was conducted of available documentation on the overall operational environment for early grade reading in Haiti. The documentation consisted primarily of the collection of available documents through the MENFP and the MOC, which included reports from projects and institutions that implement early-grade education programs and an overview of national policies around early grade education and book industry regulation. The purpose of the desk review was to provide contextual guidelines for assessing the local market and to adapt R4D's standard instruments for the market assessment.

Next, in Activity 2: **Interviews** – Using the participant database, interviews were scheduled with key stakeholders. Ayiti Nexus consultants managed to schedule 30 interviews and collect a total of 24 completed questionnaires across all five stipulated stakeholder groups. During the interview, consultants also obtained from the stakeholders all documentation that they had available on early childhood reading such as curricula/ intervention plans on early childhood reading as well as reports and evaluation reports. The average amount of time to conduct each interview was 1.5 to 2 hours. The total amount of time required to complete the interview phase was one month.

Lastly, in Activity 3: **Reading Materials Inventory** – Consultants have put together an inventory list using information on books available obtained from stakeholders that have an inventory of reading materials that they sell (printers, publishers) or recommend (schools, MOE, and Ministry of Culture) to children and to the community at large. The main goal of the inventory of reading materials is to “better understand the characteristics of existing materials and copyright and licensing issues” as suggested in the R4D inception methodology report. The materials inventory will provide an idea on the stock situation of early grade reading content in Haiti. It will especially provide pertinent information on language and print type: hard copy or digital. The inventory will also serve as a mechanism to know the following: how books are cataloged; the lists that distributors, book stores, and printers have on file; and identify copies of archives listing early grade reading books.

Once interviews were completed and secondary documents were reviewed, information was analyzed by Ayiti Nexus consultants.

Data Analysis Procedures

The first step in analyzing the data was the coding of questionnaires filled out by the stakeholders. The stakeholders that participated in the survey were given a unique identifier to protect their identity in the study. Their unique identifier is the stakeholder categorical group that they fall under followed by a

sequential number. For example, in the study we had two stakeholders that were classified as “Donors;” they were identified as Donor1 and Donor2.

The next step involved reading through the questionnaires to cluster themes and arrange data into collective argumentation that details the advantages, disadvantages, and opportunities under each of the seven measurable constructs of the questionnaire.

An interim report was produced after an initial analysis and submitted to R4D for comments. The feedback garnered from R4D provided Ayiti Nexus with a more robust framework under which to present the full narrative report. The last step in the data analysis involved arranging the themes attributed from the findings of the questionnaires into a final report.

Challenges & Limitations

A set of limitations associated with the execution of the market assessment surfaced. Ayiti Nexus was able to mitigate some, while others are contextual and therefore fell beyond the control of the firm and its team of consultants.

One of the most pressing limitations is the availability of viable statistical data in Haiti, especially in the government/public sector. Currently, there is no central database for detailed information concerning the educational sector and early childhood literacy within the government structure that allows researchers to properly analyze the current student enrollment, budget appropriation, state of schools, etc. The latest available data stems from 2010–2011 and does not provide data on learning outcomes, digital resources and capabilities in the schools, nor the number of libraries in the pre-schools. The question of enrollment is one that is most important in this study, but as the last data stems from 2011, it does not account for the large baby boom that took place within the internally displaced people’s camps and in Port-au-Prince after the January 12, 2010, earthquake.

Other study limitations are related to participants' rights to provide answers to questions that they felt violated their comfort level or, in the case of public officials, their need to maintain confidentiality on certain issues. Some data could not be collected from the stakeholders that are involved in direct distribution of reading books (printers and publishers), as some of them reserved the right to not provide relevant information on their companies' cost chain value, annual budget, turnovers, etc.

There were some stakeholders that agreed to participate in the study, but their busy schedules

precluded them from holding direct one-on-one interviews. Though they promised to fill out the questionnaire electronically, many of them were intimidated by the length of the questionnaire and did not follow through.

Lastly, some stakeholders refused to participate in the study, while others that were designated to be interviewed on behalf of their senior managers felt uncomfortable with the responsibility and did not participate.

Global Book Fund Country Study

INDIA – WEST BENGAL

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1. Methodology

The India West Bengal country study was conducted by Subrata Bhattacharya, consultant for International Education Partners (IEP), over the course of October 2015 – January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

The country background and context research for this study was conducted in the UK by IEP. In-country interviews were conducted by Subrata Bhattacharya in Kolkata and New Delhi using the interview protocols jointly developed by Results for Development (R4D) and IEP. Secondary research was also used to validate the data provided by the interviewees. A detailed list of interviews is provided in Appendix 1 of this document.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background and Education System

India's geographical area is approximately 3,287,263 km² and West Bengal, with an area of 88,752km², is India's fourth most populous state. The population of India is 1.252 billion, with over 91 million of those living in West Bengal.⁷² The annual per capita income of India is estimated at US\$1,580 and the country's poverty ranking was 135 in the 2013 HDI Index.⁷³ Figure 2 shows the states of India, including West Bengal. West Bengal is very densely populated with a population density of 1,029/km².⁷⁴ The population growth rate in West Bengal was 13.9% (2001–2011), and West Bengal has 7.79% of

the total population of India.⁷⁵ The age structure of the Indian population is currently:⁷⁶

- ▶ 0–14 years: 28.5% [male: 118,695,540; female: 165,048,695]
- ▶ 15–24 years: 18.1% [male: 118,696,540; female: 105,342,764]
- ▶ 25–54 years: 40.6% [male: 258,202,535; female: 243,293,143]
- ▶ 55–64 years: 5.8% [male: 43,625,668; female: 43,175,111]
- ▶ 65+ years: 5.7% [male: 34,133,175; female: 37,810,599]

There is a clear gender gap in adult literacy rates. According to the 2011 Census, in West Bengal the adult literacy rate was 77% (male: 83%, female: 71%). Literacy gender distribution at the end of primary school age was 81% for boys and 65% for girls.

Figure 1: Map of India



⁷² World Bank India. (2016). Retrieved 2016 from <http://data.worldbank.org/country/india>

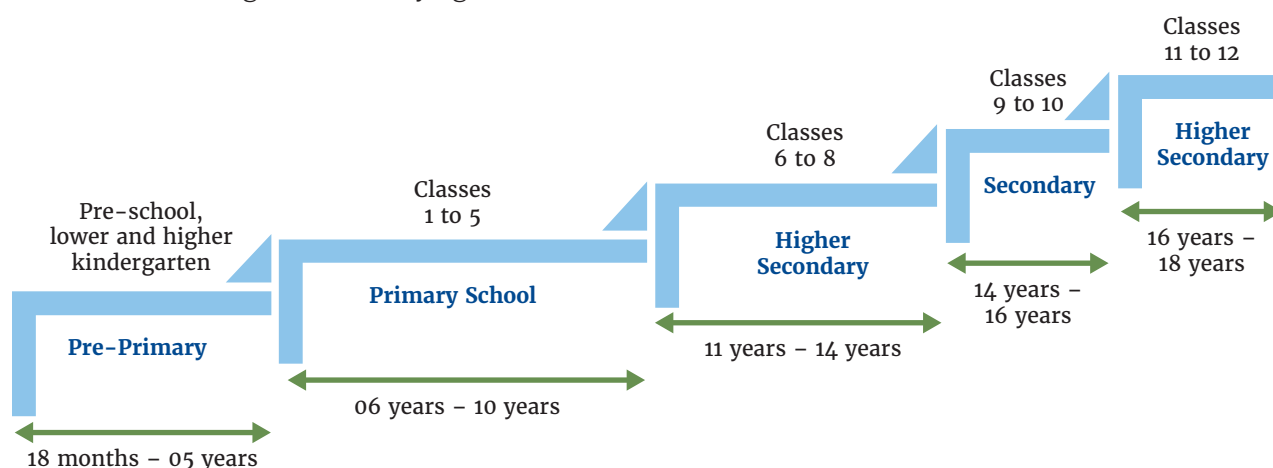
⁷³ UNESCO UIS. (2014). India Country Profile. Retrieved 2016, from <http://www.uis.unesco.org/DataCentre/Pages/country-profile.aspx?code=IND>

⁷⁴ Ministry of Home Affairs. (2011). 2011 Census. Retrieved 2016, from <http://www.censusindia.gov.in/2011census.html>

⁷⁵ Ibid.

⁷⁶ CIA. (2015). World Factbook.

Figure 2: Education Segmentation by age and levels of education



Source: British Council. (2014). *The Indian School Education System: An Overview*.

In India, pre-school education is provided by private schools and government integrated child development services (ICDS), often referred to as Anganwadi centers. In addition, there are some Early Childhood Care and Education (ECCE) centers running under the direction of Sarva Siksha Abhiyan (SSA). The availability of schooling facilities is measured by a set of national access indicators. One of these is that any habitation is entitled to have a primary school if it has a total population of at least 300 and there is no school within a distance of one kilometer. Primary education aims to provide students with a sound basic education in reading, writing, and mathematics along with an elementary understanding of social sciences.

The Indian school system can be segmented in any of the following ways (also seen in Figure 2):

- ▶ By level of education
- ▶ By the ownership of educational institutions
- ▶ By the affiliation of education boards

Segmentation by level of education⁷⁷

The division of grade levels in India is as follows (Figure 2):

- ▶ Pre-school: education at this level is not compulsory

- ▶ Private play schools catering to children between the ages of 18 months and three years
- ▶ Kindergarten: divided into lower kindergarten (for 3–4 years old) and upper kindergarten (between 4–5 years old)
- ▶ Primary schools from grades 1–5 for 6–10 years old
- ▶ Middle School/Upper Primary Schools from grades 6–8 for 11 to 14 years old
- ▶ Secondary School for grades 9 and 10 for 14 to 16 years old
- ▶ Higher Secondary School for grades 11 and 12 for 16 to 18 years old

As depicted above, eight years of primary education in India are divided into two stages—a junior stage covering a period of five years and a senior stage covering a period of three years—and cover an age range of 6–14 years.

Segmentation by ownership of educational institutions

Schools in India are owned either by the government (central, state, or local bodies) or by the private sector (individuals or trusts/societies).

⁷⁷ This section is drawn from British Council. (2014). *The Indian School Education System: An Overview*.

Segmentation by affiliation with educational boards

In India, the various curriculum bodies governing the school education system are:

- ▶ The Central Board of Secondary Education (CBSE) was established in 1962 under the Ministry of Human Resources Development (MHRD). CBSE gives affiliation to both public and private schools. There are about 15,167 schools affiliated under CBSE.
- ▶ Council of Indian School Certificate (CISCE) is a private, non-government education board in India. It conducts ICSE (grade 10) and ISC (grade 12) examinations. There are about 1,900 schools affiliated to the CISCE board.
- ▶ State Government Boards. These educational boards are supervised and regulated by the state apex organization for secondary and senior secondary examinations.
- ▶ National Institute of Open Schooling (NIOS) is the board of education for distance education under the union government.

Besides these, there are two international examination boards operating in India. They are the International Baccalaureate Organisation (IBO) and Cambridge International Examinations (CIE).

In West Bengal, there are five education boards that administer and conduct various school examinations as follows:

- ▶ West Bengal Board of Primary Education
- ▶ West Bengal Board of Secondary Education
- ▶ West Bengal Board of Higher Secondary Education
- ▶ West Bengal Board of Madrasah Education
- ▶ The West Bengal Council of Rabindra Open Schooling

The ratio of lower primary to upper primary differs in each state. For example, Chandigarh, Maharashtra,

Kerala, Mizoram, and Rajasthan have a 1:2 upper primary to lower primary school ratio. Some states, including Goa, Haryana, Tamil Nadu, Uttar Pradesh, and West Bengal, have higher ratios, which mean that they have not provided a large enough number of upper primary schools.

The Department of Elementary Education (DEE) is the department of the National Council for Education Research and Training (NCERT) that advises the Government of India on elementary education policies and programs. It acts as the national center for the implementation of the Sarva Shiksha Abhiyaan (SSA), also known as Education for All, and the Right of Children to Free and Compulsory Education (RTE) Act, 2009. SSA was introduced in 2000–2001 as the flagship program run by the Government of India. This scheme was intended to provide useful and relevant elementary education for all 6 to 14 year old children by 2010.

Primary school enrollment in India has been a success story in recent years with enrollment reaching at least 96% of the target primary population since 2009.⁷⁸ As seen in Figure 3, India now has 1.4 million schools and 7.7 million teachers. Despite these impressive figures, the dropout rates continue to be high. Nationally, 29% of children drop out before completing five years of lower primary school and 43% before completing upper primary school.⁷⁹ Despite the significant number of enrolled students, seen in Figure 4, India is among the top five nations worldwide for out-of-school children of primary school age, with 1.4 million 6 to 11 year olds not attending school.⁸⁰ The school systems and infrastructure also face shortages; an estimated shortage of 689,000 teachers has been reported in primary schools, only about half of schools have functioning girls' bathrooms, and only 74 percent have access to clean drinking water.⁸¹ According to the 2012 Indian Market Research Survey, there were 139.9 million (2011–2012) students enrolled in the 8 grades of primary education in 2011–2012, comprising 72.6 million boys and 67.2 million girls.

⁷⁸ Sahni, U. (2015). *Primary Education in India: Progress and Challenges*. India-US Policy Memo. Brookings.

⁷⁹ Ibid.

⁸⁰ Ibid.

⁸¹ Ibid.

Figure 3: Number of Indian Schools by ownership

	Public Sector Schools		Private Sector Schools	
	Government	Local body	Private Aided	Private Unaided
Primary	524,234	140,765	26,484	68,203
Upper Primary	219,451	59,961	22,742	63,748
Secondary	42,119	11,582	27,053	36,252
Higher Secondary	24,808	1,847	17,302	20,441
Total	810,612	214,155	93,581	188,644
Sector wise Total	1,024,767		282,225	

Source: British Council. (2014). *The Indian School Education System: An Overview*.

Figure 4: Enrollment in Indian schools

	Public Sector Schools		Private Sector Schools	
	Government	Local body	Private Aided	Private Unaided
Primary	43,324,000	24,827,821	4,649,347	8,099,485
Upper Primary	22,951,000	15,230,497	5,823,375	10,230,142
Secondary	8,813,691	3,451,521	10,537,642	7,441,667
Higher Secondary	10,890,079	1,290,192	16,144,037	7,932,526
Total	85,978,770	44,800,031	37,154,401	33,703,820
Sector wise Total	130,778,801		70,858,221	

Source: British Council. (2014). *The Indian School Education System: An Overview*.

West Bengal had 74,678 primary schools in 2011, with a lower primary enrollment of 9.8 million (boys: 4.96 million; girls: 4.87 million). The lower primary NER was 98.59% and the GER was 115.30%. Of the 267,000 lower primary teachers, 44% are female and 56% are male. According to provisional statistics from the 8th NCERT Survey, there are a total of 1,306,992 schools in India as compared to 1,030,996 recorded in the 7th NCERT Survey—an increase of 26.77%.

Unfortunately, education quality has not kept pace with the progress in access to schooling. According to the 2012 Annual Status of Education Report for

rural India, in 2008 only about 50% of Grade 3 students could read a Grade 1 text, but by 2012 this had declined further to only 30%. Students in Grade 3 who could correctly recognize digits up to 100 decreased from 70% in 2008 to 50% in 2012. In the last four years, quality is reported to have fallen to low levels and is an issue of national concern. A similar deterioration in the standards of education was also noted among Grade 5 students. The poor quality of education and the rate of decline are not necessarily uniform across India. Although there is no specific data available on the quality of primary

education in West Bengal, interviews with teachers, DEE officials, and non governmental organizations (NGOs) confirmed that low quality is a concern in government primary schools, which in turn has fueled the rapid growth in private primary and pre-school education.

2.2 Country Language Profile

India is home to a variety of languages. The 2013 People's Linguistic Survey of India⁸² counted 780 languages and estimated that there may be an additional 100. These estimates are significantly greater than the officially stated count of 122 languages. The disparity between the government language count and the number identified by the survey is due to the fact that the government does not count languages with fewer than 10,000 speakers. The survey implementers and volunteers on the other hand combed the country to find languages such as Chaimal in Tripura, which is today spoken by just four or five people. The survey, which was conducted over four years by 3,000 linguistic volunteers and staff of the Bhasha Research & Publication Center ("Bhasha" means "language" in Hindi), also concluded that 220 Indian languages have disappeared in the last 50 years and that another 150 could vanish in the next half century as speakers die and their children fail to learn their ancestral tongues.

Some of India's languages are accepted nationally, while others are languages spoken in particular regions. The constitution of India (Article 343) designates Hindi and English as the official languages of the Government of India. Apart from these two widely spoken languages, the 8th schedule of the constitution of India lists 22 regional languages which are given official status. Most states in India have their own official language. According to the 2001 census report,⁸³ 422,048,642 people spoke Hindi as L1 or L2 languages, which was then 41% of the Indian population. The second largest spoken

language was Bengali, with 83,369,769 speakers in India (8.11% of the Indian population at that time). Taken together, in India and Bangladesh, there are an estimated 200 million Bengali speakers. A full list of Indian languages identified as official languages by the government of India are provided in Appendix 2.

2.3 Language of Instruction (LOI) Policy

In its simplest form, Indian Language of Instruction (LOI) policy enables the state language (e.g., Bengali in West Bengal) to be used as the LOI in all government primary schools in Grades 1–5, with the state language (e.g., Bengali) and English taught as parallel curriculum subjects. While Hindi is widely spoken, it is not a compulsory LOI for all of India but only in Hindi-speaking regions. The government of India's three language policy is introduced from Grade 6.⁸⁴ It is entirely optional to continue the LOI in a state language or a regional language. For instance, if a student from a Hindi-speaking area wants to continue his/her education in Hindi from Grade 6 onward, he/she can do so. The basic LOI formulas are:

Primary [Grades 1 to 5]:

- ▶ Grades 1–2: usually the local or regional language
- ▶ Grades 3–5: usually the local or regional language

Upper Primary [Grades 6 to 8]:

- ▶ Choice of three languages: local or regional language, modern Indian language, and/or English

Secondary Education [Grades 9 to 10]:

- ▶ Choice of three languages: local or regional language, modern Indian language, and/or English

Higher Secondary [Grades 11 to 12]:

- ▶ Choice of four languages: local or regional language, modern Indian language, English, and/or foreign languages (depending on the demand and availability of infrastructure, languages like

⁸² Devi, G. (2013). People's Linguistic Survey of India. Bhasha Research & Publication Center.

⁸³ Ministry of Home Affairs. (2001). Census Data Online. Retrieved 2016, from <http://censusindia.gov.in/2011-common/censusdataonline.html>

⁸⁴ The three language system is not followed in Tamil Nadu for political reasons.

Chinese, Japanese, Russian, French, German, Arabic, Persian, and Spanish can be offered as additional options at the secondary level)

The results of the 7th NCERT Survey of LOIs in India (October 2006)⁸⁵ provide a preliminary understanding of the breakdown in the use of these types of languages as LOIs:

- ▶ 92% of primary schools used a local language as their LOI. 92.39% of primary schools in rural area and 90.39% of schools in urban areas used a local language as the LOI.
- ▶ 12.14% of primary schools had two or more LOIs.
- ▶ English was used as the language of instruction in 12.98% of lower primary schools. 18.25% of upper primary schools used English as the LOI with 25.84% of lower secondary schools and 33.59% of schools at the higher secondary level using English as the LOI.
- ▶ Hindi was used as a language of instruction in 46.79% of lower primary schools, 47.41% of upper primary schools, 41.32% of lower secondary schools, and 48.11% of higher secondary schools.

3. Current Print and Digital Reading Book Provision

To preface the discussion to follow, it is important to note that although children's reading books and materials are now available in English, Bengali, Hindi, and most of the other official Indian languages at the primary level in India, it is difficult to assess the precise availability of such books in government primary schools on a national or even a state (West Bengal) level.

3.1 Reading Book Availability and Awareness

There are three important non-profit organizations based in New Delhi which are publishing quality children's books both in English and in other regional

languages—including Bengali—at affordable, heavily subsidized prices. These are: The National Book Trust (NBT), the National Council for Education, Research and Training (NCERT), and the Children's Book Trust (CBT). NCERT mainly publishes educational textbooks which are distributed throughout India by state, but it also publishes primary level reading books in a number of different national and regional languages, including Bengali. Besides these organizations, there are other state level and state funded publications and many private sector publishers which publish children's reading books in both English and local languages. NBT and CBT primary reading book backlists are impressive in their quality and variety and tend to focus on the upper primary level. The prices range between Rs.20–Rs.90 (US\$0.30–US\$1.30) per title, with the number of pages ranging from 32–148, respectively. The regional language publications from these organizations are primarily in Oriya, Kanada, Marathi, Malayalam, Telegu, Tamil, Gujrati, Punjabi, Bengali, Konkani, Assamese, and Hindi.

A number of initiatives are also underway to promote a reading culture. NBT's sustained Book Reading promotion campaigns over many years plus the organization of State Book Fairs and private publishers' promotions have generated a significant awareness of children's literature. NCERT runs an early literacy (Mathura) project supported by their Barkha (graded) series of reading books at the national level. There are various NGO initiatives on school libraries/public libraries and on the promotion of a reading culture. The West Bengal state government in association with UNICEF and Pratham publishers have a joint program called EGRAN for schools in Malda district where they are trying to pilot the development of a book reading culture along with best literacy practices.

Popular titles are generally available in key bookstores in most of the cities and major towns. However, the availability of children's reading books is reported to be rare in rural India, including West

⁸⁵ NCERT. (2006). 7th Survey of Languages of Instruction in India.

Bengal, because there are no, or very few, bookshops coupled with learning environments that encourage a reading culture. This is particularly a problem when considering approximately 70% of West Bengal's population lives in rural villages. Student access to books in primary schools in rural areas in West Bengal is mostly restricted to school textbooks which students have to own and which are provided free to government primary schools. However, the government of West Bengal doesn't fund the supply of any children's reading books to primary schools. As a general rule, private urban schools do better with reading book availability than government rural primary schools. The Right to Education Act has a mandatory provision for schools to provide a school library, but this has not been widely implemented in West Bengal or in most other states. As a result, school and classroom libraries in West Bengal rural primary schools are largely non-existent except where combined primary and secondary schools provide some kind of school library access to primary students. Even in urban areas, not many primary schools have well-developed libraries. In contrast, some elite primary schools in cities have large libraries with Internet facilities. Most government primary schools do not have adequate operational budgets to enable school purchases of additional reading books, but some big schools in urban areas do allocate annual budgets for their libraries to buy reading materials.

Despite the active promotion of reading books and the reading habit by national and state governments, concerned NGOs, and private sector publishers, the use of children's reading books in support of early literacy and upgraded student performance hardly exists in most government primary schools and is particularly rare in rural and remote areas of West Bengal. However, the rapidly growing private school market and the aspirations of many middle class parents who can afford to buy books for their children to read at home are providing an increasing market for children's books in both Bengali and English, particularly in urban areas. Current state government

policies not to buy reading books for government primary schools is the most significant problem that inhibits reading book availability in West Bengal government schools.

3.2 Digital Materials and Available Technology

According to the World Bank's information and communication technology (ICT) Case Study for Education in West Bengal,⁸⁶ the telecom infrastructure of West Bengal is well positioned to support school-based facilities. The state government is building the core infrastructure through several key initiatives. The most significant of these is the State Wide Area Network (SWAN) which has been created to provide statewide internet connectivity that can be leveraged by different government departments to provide electronic services. West Bengal enjoys the advantage of being one of the emerging IT hubs in India with significant potential for harnessing ICT for education (ICT4E). It has the added advantage of a wide reach of ICT, since it is one of the few states in India where successful personal computer (PC) penetration has been achieved at the village level through the empowerment of local self-government bodies, the *gram panchayats*. PCs are now available to all 210 *gram panchayats* across the 19 districts of West Bengal. However, several critical factors need to be addressed to ensure the successful integration of ICT into the primary education system. These are:

- ▶ **Teacher training.** Capacity building is one of the key areas where there is scope for development. There is a lack of trained teachers who can then efficiently train the students and appreciate the requirement to align ICT with the regular curriculum.
- ▶ **Infrastructure in schools** (e.g., access to electricity and the Internet and access to efficient and cost effective maintenance services). Existing infrastructural facilities in primary schools need to be improved for the successful and unhindered implementation of ICT4E.

⁸⁶ PricewaterhouseCoopers. (2010). *ICT Case Study for Education in West Bengal*. World Bank.

- ▶ **Curriculum.** The curriculum needs to be updated, and new modes of learning need to be promoted in order to keep pace with changing requirements.
- ▶ **Public-private partnerships.** Effective partnerships with private players with clearly defined roles and responsibilities would ensure better management and would support government initiatives more efficiently.
- ▶ **Coordination between IT and education ministries.** Better coordination between different government departments with responsibility for IT and education initiatives would result in more streamlined and effective implementation of major schemes.
- ▶ **Local oversight.** Since ICT is new to rural areas in West Bengal, it will be important to establish institutional networks at *panchayat samiti* (local self-government) levels. These institutions, if provided with adequate funding and professionally trained staff, could take responsibility for capacity building to facilitate in-service training of teachers and ensure optimal utilization of available ICT resources.

Central and state investment in ICT4E is strongly focused first on secondary education. The ICT@Schools scheme is a centrally sponsored scheme being implemented by different state governments in India. It was launched in 2004 and has been an important step toward crystallizing educational policies and aligning them with ICT possibilities. The scheme is currently running in both government and government-aided secondary and higher secondary schools. In 2007–08, West Bengal adopted the scheme and introduced ICT into 543 government-aided higher secondary schools at a cost of approximately US\$8 million. The state engaged full-time computer teachers in these schools and encouraged computer education. In 2008–09, 2,418 more secondary schools were included in the scheme, and training was provided to other subject teachers in how to utilize ICTs in the teaching of all subjects.

The West Bengal Social Council for Education Research and Training (SCERT), with the West Bengal

Board of Secondary Education, the West Bengal Council of Higher Secondary Education, and the West Bengal Board of Primary Education, has been primarily responsible for developing textbooks in line with the national curriculum framework. However, in recent years, SCERT has been creating multimedia content to support computer-assisted learning (CAL) for students in government schools, including primary schools.

According to a World Bank India Case Study, An innovative product called KYAN is being deployed in most West Bengal districts. KYAN, meaning the Vehicle of Knowledge, is a community computer developed in collaboration with the Indian Institute of Technology (IIT) in Mumbai. It is effectively a digital multimedia device. The device contains a computer with in-built projector, content, and speakers and has a wireless keyboard and mouse. It combines the computing power of a desktop computer with an appropriate high-luminosity, high-resolution, and large-screen projection system. The content within the KYAN consists of 1,090 lessons on various hard-to-teach topics in all subjects from kindergarten up to Grade 10. After the first phase, it was realized that the lessons needed to be mapped to the topics of the textbooks; thus IL&FS Education and Technology Services (the education initiative of IL&FS, also known as IETS) has mapped the topics in the primary textbooks and matched them to the KYAN content. IETS has translated the lessons into Bengali and Urdu. Content generation is a continuous process, and the content is updated in all the KYANs running in the state as and when required.⁸⁷

In recent years, West Bengal has launched many ICT4E initiatives in its school system, funded by a variety of local and international companies including UNICEF, Intel, and IBM, which have supported both hardware and software components. The majority of these initiatives are focused on secondary schools. In the short term, the costs of upgrading government primary schools with sufficient hardware to support large-scale digital reading capacity is unlikely to be

⁸⁷ World Bank. (2010). India Case Study.

met, but West Bengal has large-scale ICT4E ambitions for its education system, and mid to longer term possibilities for digital reading at the primary level cannot be ruled out. However, school interviews demonstrate little interest in digital reading, and teachers are clearly much more interested at present in getting access to hard copy books.

4. Country Findings and Market Gaps

4.1 Authorship and Publishing Capacity

India has a powerful and vigorous private sector publishing industry operating in Hindi, English, Bengali, and most of the official Indian local languages. The India Book Market Report released by Nielsen in 2015 values the print book market in India, including book imports at US\$3.9 billion. This positions India as the sixth largest book market globally. The report states that there are more than 9,000 (English language) publishers in India and notes that this differs from the 19,000 publisher number that has been cited by industry bodies which likely better represents publishers of all languages in India. The Nielsen study indicates that 55% of trade sales are of books in English, while books in Hindi account for 35%. Books in English account for two-thirds of educational sales, but more than half of the fiction sold in India is in other local languages. Moreover, the Indian educational book market continues to expand; the K-12 school books sales have increased from 63 billion rupees (US\$956 million) in 2007-08 to 186 billion (US\$2.8 billion) in 2013-14.⁸⁸

The Indian publishing industry benefits from growing literacy, digital initiatives, and the outsourcing of publishing services to India. On the other hand, challenges for the industry include a lack of direct investment from the government, challenges in distribution, long credit cycles, cost increases, and intellectual property (IP) infringement.⁸⁹

Unfortunately data on the value of publishing in Bengali and the number of Bengali language titles

published each year is limited. The substantial output of commercial, private-sector publishers in Bengali is supplemented by the subsidized Bengali language children's books produced by the NBT, NCERT, and the CBT. Bengali language publishing in Kolkata is particularly strong, as is demonstrated by the annual Kolkata Book Fair which attracts up to a million visitors every year. Bengalis have a national reputation for their passionate interest in books and literature. There are plenty of small Bengali publishers who wait for the annual Kolkata Book Fair as a major sales opportunity. There is a very rich history of children's literature in West Bengal, including by Rabindranath Tagore and Sukumar Ray whose books are still bestsellers.

There are many important publishers of children's books in Bengali including Pratham, Tulika,⁹⁰ and the three Bengali language publishers listed below who were interviewed for this country study.

- ▶ Sishu Sahitya Sadan: The owner was also previously the president of the Federation of Indian Publishers (FIP) and has also been on two occasions the Vice President of the FIP Eastern India Chapter. The company was established in 1952 and is a reputable children's book publisher with most of its output in Bengali plus some English language school textbooks and early grade reading books for English and Bengali-medium private schools.
- ▶ Sahitya Bharati is widely considered to be a very progressive, professional publishing house also specializing in Bengali and English language children's books for both primary and secondary schools.
- ▶ Dev Sahitya Kutir was established in 1924, though prior to that the company had been publishing in Bengali under a different name since the nineteenth century.

These three publishers alone have current lists and backlists of primary children's books in Bengali amounting to hundreds of titles, and there are many

⁸⁸ Nielsen. (2015). *The Indian Book Market: Understanding the Indian Book Market*. London, New York, New Delhi: Nielsen, The Association of Publishers in India, and Federation of Indian Publishers.

⁸⁹ Ibid.

⁹⁰ Tulika is a Chennai-based NGO publishing children's books in Bengali as well as in other languages.

other competent Bengali language publishers of primary level children's books in Kolkata. Most of the children's books published by the interviewed publishers are graded for age and interest levels, and all three publish both primary grade reading books and bilingual textbooks in Bengali and English. Full details of their lists are available on their websites.

In addition, the West Bengal Ministry of Culture supports Bengali language children's book publishing as does the National Book Trust, the Children's Book Trust, and NCERT in New Delhi plus a number of other NGOs and parastatal organizations.

In summary, primary level children's book publishing in Bengali has both the authorship and publishing capacity to provide adequate quantities of decodable and leveled reading books for any potential GBF-funded reading book provision intervention.

4.2 Printing

The Indian printing industry has undergone revolutionary changes, particularly in the past 15 years, but the process really started after the liberalization of the Indian economy in 1990. This initiated a period of reforms which aimed at shedding protectionism and embracing full and open international competition. Privatization was encouraged with the aim of integrating the Indian economy with the world economy. This drastic change in the direction of the country's economy opened the doors for the Indian print industry to modernize by investing in the latest and the best technology and plant and simultaneously upgrading quality, services, reliability, and price competitiveness. The printing industry has also aggressively pursued market opportunities worldwide and has become a key player in donor-funded bidding for textbook and reading book manufacturing contracts for many SSA publishers and countries.

In 2015, there are many progressive printers who are equipped with the latest computer-controlled printing machines and integrated flow lines for binding and

finishing, while state-of-the-art digital technology is being used in pre-press. Leading printing companies have optimized the use of information technology in each and every area of the printing business. The quality of printing on high-end, offset-litho printing presses has now reached parity with good international standards. Screen printing technology has developed particularly well in India. According to a recent estimate, there are now between 65,000 and 100,000 book printers in the country which are primarily engaged in advertising and manufacturer's promotion work but also undertake book printing as well. The annual turnover of the Indian printing industry in 2014 was estimated at approximately US\$11 billion.⁹¹

The Indian print industry is highly fragmented. Many printers confine themselves to their own local regions and refrain from competing in new territories due to lack of investment funds. Although most of the international printing houses doing offshore work for foreign customers are probably located on or close to the West coast in and around Mumbai or in Delhi, the traditional strength of Bengali publishing has ensured that Kolkata also has a powerful, well-equipped, and competitive book manufacturing industry which is more than capable of supporting any GBF project in West Bengal with good quality, competitively priced books. The printing requirements for books for the English-medium private schools are mostly handled by New Delhi printers where the majority of English language publishers are based. Most of the private small/medium Bengali language publishers print their books in Kolkata through small and medium-sized printers because they get better prices. Government textbooks are generally handled by their own establishments. It is possible that competition between India and Bangladesh would require that any GBF interventions in the two countries might have to use different titles and manufacturing sources in order to favor national publishers and printers. However, print runs in the two countries would certainly be large enough to achieve best prices.

⁹¹ Indian Mirror. Coimbatore, Tamil Nadu, India.

4.3 Procurement

The provision of textbooks is funded by each state education ministry, and there is no formal procurement process for the selection of authorship, publishing, and manufacturing services, all of which are handled internally. For West Bengal, the printing of free textbooks for schools is undertaken in the Kolkata-based printing industry.

Because state ministries do not fund the provision of reading books to government schools, there are no procurement processes involved in the selection and purchasing of titles. Titles purchased by individual primary schools are based on school selection and direct purchasing from publishers and/or booksellers.

4.4 Bookselling and Book Distribution

Indian bookselling is strong in English language, Hindi, Bengali, and other local language books in cities and in the major towns. Booksellers in India cover the full range of specializations from academic and scholarly books, including medical, legal, art, architecture, and other specialist higher education booksellers, through college booksellers selling undergraduate textbooks, through to general and children's booksellers and educational bookshops supplying the substantial and rapidly growing private school books and educational aids market.

The weakness of Indian bookselling in terms of the comprehensiveness of its market coverage is its limited coverage in rural areas, thus largely cutting rural schools off from access to the wide range of children's reading books—even if rural schools had any funds to purchase reading books. Over the past 30 years, the role of booksellers in private school supply has been greatly diminished because publishers have increasingly supplied direct to private schools in order to reduce prices and increase sales and profit margins. This is as true in West Bengal as it is in the rest of India. For government schools in India and West Bengal, free or highly subsidized textbooks are distributed by state education ministries. It is unusual for state ministries of education to supply free reading

books to schools, though there are donors and NGOs who do so in relatively small quantities to a small number of selected recipient schools on an occasional basis, but this doesn't represent a comprehensive and sustainable supply of reading books for government primary schools. Nevertheless, any GBF-funded supply of reading books intended to reach all rural government primary schools would probably have to rely on distribution via the state ministry of education.

4.5 Public Libraries in West Bengal

The Department of Public Libraries (DPL) of the Government of West Bengal maintains a National Library and 30 District Libraries in West Bengal, with over 5,000 primary grade reading books in Bengali held in stock. Lending is restricted to adults aged 18 or over, so the reading book stock is only available to young children who can read in the library reading room or whose parents borrow on their behalf. The DPL in West Bengal runs a further 232 libraries in towns and over 2,000 small libraries serving rural areas. Not all district or town public libraries maintain children's sections. However, 10% of the public library purchasing budget is required to be spent on children's books in different languages. Borrowing is generally permitted from district libraries but is not generally well-developed in West Bengal. District libraries run mobile services to some schools in disadvantaged rural areas.

4.6 Teacher Training Issues

Interviews with primary teachers, NGOs involved in reading book development, and Ministry of Education officials identified the following as the most important teacher training issues related to primary reading book provision and use in government primary schools:

- ▶ Teacher training in the use of reading books in class and at home in support of early literacy, the early development of research skills, the development of a lifelong reading habit, and overall student performance improvement
- ▶ Training in the importance, development, management and use of school and particularly classroom libraries

- ▶ Training in reading book stock management and conservation, bearing in mind the widespread sub-standard school storage facilities, particularly in rural areas

Ideally the training described above should be part of primary pre-service teacher training as well as the subject of intensive in-service teacher training.

4.7 *Financing*

Books for government schools are printed and supplied by the government and are provided free to schools. The content and quality of government publications is generally poor across all states in the country and is also poor in production quality. The quality of paper has been improved in West Bengal in recent years, but because of poor bindings, the textbooks rarely last for more than one year. Some Indian state school boards translate NCERT publications. NCERT prepares a national framework for Indian schools, but it is not mandatory for state education boards to fully implement the NCERT national curriculum and use NCERT books; however many states follow the NCERT curriculum pattern. NCERT books are mandatory for all schools from Grades 9–12 affiliated with the all India CBSE board

It is difficult to differentiate between the level of textbook quality and the production output of individual Indian states. Most observers conclude that state supplies of textbooks for government schools are generally of the same low standard in all states, although those states which use translated NCERT publications are likely to have better content quality. Free textbook distribution to all government primary schools for Grades 1–5 in West Bengal commenced in the early 1950's. It was started with only one book titled *Kishalay* (a Bengali book) in five parts for five classes. The current chief minister of West Bengal extended free textbook distribution from Grades 6–8 for all curriculum subjects. Free textbooks could be extended up to Grades 9–10 during 2016.

Free school textbooks are supplied to government schools annually at the beginning of the school year

commencing in January in West Bengal but in April in most other states. Schools generally get their textbook supplies in December. Annual free textbook supplies to West Bengal are delivered every year to government schools so that annual textbook budgets are reliably provided. State governments rarely, if ever, fund the provision of reading books in any language. Schools, particularly in rural areas, do not have operational budgets to enable them to buy their own reader supplies, nor are there bookshops from which they could purchase them.

West Bengal's annual printing budgets for textbook supply to government primary schools were not available for inclusion in this study.

4.8 *School Management and Usage*

There is little information available on school management of textbooks and reading books. West Bengal Primary Education Department supplies textbooks free of cost from pre-school grades up to upper primary Grade 8 to all government primary schools. Private schools do not get free books from government. However, if they want to use government textbooks, then the school has to be affiliated with the West Bengal Primary Education Board through an application but subject to inspection by government inspectors. Even after getting the affiliation, they cannot get textbooks free of cost but have to purchase them from government stores.

Schools are informed about the arrival of each new session's textbooks in November/December, and they in turn inform parents and students accordingly. Distribution of textbooks happens annually in West Bengal on January 2, which is called 'Book Day.' Parents thus know when annual free textbook supplies are due to arrive in schools and expect their children to be issued with the required books, after which management becomes the responsibility of the student and parents rather than the school.

Because textbook supply assumes a one-year classroom life there is no incentive to maintain books in good condition and to achieve re-use. Because most

schools have few, if any, reading books, there are no issues related to their management and use. However, inadequate school storage in rural government primary schools is an issue that any GBF investment in West Bengal would need to take into account.

There is no provision for the replacement of lost and damaged books because free state textbooks are not available for sale on the open market. However, lost books can be replaced via one of the following options:

- a) Requesting a copy from any excess stock held by the school
- b) Procuring a replacement from the local Sub-Inspector of Schools office after submitting an application through the head teacher
- c) Acquire a used copy from the previous session's students who have been promoted to the next class—provided the syllabus and the textbook remain the same

4.9 Digital Opportunities

Although West Bengal has ambitious plans for the development of ICT4E, most of its efforts are concentrated on lower and upper secondary schools rather than on primary schools. Lack of widespread access to electricity in rural areas, problems with Internet connectivity, lack of trained teachers, inadequate storage to look after sensitive electronic hardware and software, and lack of hardware availability in primary schools indicate that there will be no short-term possibility of developing the use of digital facilities for reading.

4.10 Bengali Reading Book Inventory

During the research for this country study, three major Bengali language publishers were interviewed. During the interviews, the concept of an inventory of Bengali language children's books was discussed. In principle, all three publishers agreed that they would be prepared to contribute digital copies of their children's books onto the GBF inventory on the

condition that their copyrights would be respected, and there would be no unauthorized usage.

It is considered likely that the majority of publishers would also be willing to participate in the development of such an inventory. Additionally, there are many Bangla language titles and many more published in West Bengal and by organizations such as the Indian National Book Trust which could also be part of a large-scale Bangla language inventory.

5. Discussion and Opportunities for a Global Book Fund

Falling standards in literacy and student performance in government primary schools, combined with a widespread lack of reading books in either Bengali or English and the lack of a school reading culture, suggest that a GBF reading book intervention could be important in raising school standards.

Because of the large-scale enrollments in West Bengal government primary schools, ranging from 2.5 million in Grade 1 to 1.5 million in Grade 5, reading book print runs for a GBF intervention would be very large and unit costs would be minimized. The proximity to the large Bengali children's book market in Bangladesh could theoretically push print runs for selected GBF titles into multi-millions, but national sensitivities over print locations could prevent a single printing for use in both countries and separate Indian/Bangladeshi printings could be necessary.

The West Bengal MOE funds textbook provision reliably but has never funded the provision of reading books to government schools. School operational budgets are widely considered to be insufficient, except in private schools and elite urban schools, to purchase adequate numbers of reading books from their own funds. The importance of a good supply of reading books in improving reading and literacy is not widely appreciated by lower primary teachers, and teacher training in the importance and classroom use of reading books in support of literacy would be important in supporting any GBF intervention. School management of books is reported to be weak and simple management

systems would need to be developed in support of a GBF intervention. These systems would need to take into account widespread sub-standard storage in rural government primary schools.

Any GBF intervention would need to establish as pre-conditions that progress needs to be made on the teacher training, school management, and school storage issues described above. Bearing in mind the constrained financial resources of state ministries of education, the achievement of guarantees of financial sustainability could be problematic. A key issue is the need to convince the state ministry of education of the importance of reading books in class to upgrade standards.

Children's book authorship capacity in both Bengali and English is well-developed and state and private sector publishing capacity in both languages is long-established and widely considered to be professional and capable of high quality output. Kolkata is one of the centers of the successful Indian printing industry which now provides low cost, high quality, and reliable book manufacturing services to many SSA countries, so that good quality, low cost manufacturing is readily available to support a GBF intervention.

Although West Bengal is one of India's ICT growth centers, ICT4E investments in West Bengal are strongly focused at present on secondary education. In the short term, it is unlikely that government primary schools, particularly in rural areas, will be in a position to generate the funding required to develop a digital framework for reading. Nevertheless, West Bengal has big ICT4E ambitions and the development of digital media in primary schools in the medium term should not be ruled out. A future GBF intervention could look at how this could be leveraged.

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7. Appendix

7.1 Appendix 1: Interview List

Publishers			
Sishu Sahitaya Samsad	Kolkata	Debojoyti Datta	CEO and Managing Director
Academic Publisher	Kolkata	Bimal Dhar	CEO & Managing Director
Sahitya Bharati	Kolkata	Siddarth Beri	Director
Dev Sahitya Kutir	Kolkata	Rajarshi Majumdar	Director
Printers			
Gopsons	Delhi	Sunil Goel	Managing Director
S P Communications Pvt. Ltd.	Kolkata	Prasun Bhuit	Managing Director
Anderson Printers	Kolkata	Tarun Mandal	Chief Manager(Sales)
CDC Printers	Kolkata	Raju Shaw	Managing Director
Ministry of Culture			
National Library	Kolkata	Parthasrathi Das	Deputy Librarian
State Central Library	Kolkata	Abhijit Bhowmick	Abhijit Bhowmick
British Council	Kolkata	Indrani Bhattacharya	Librarian
Schools			
Gokhale Memorial Girls School	Kolkata	Sanghamitra Mukherjee	Rector
Panindranath Kindergarten House	Kolkata	Indranil Mukherjee	Chairman
Model Kindergarten	Kolkata	D. L. Sarkar	Founder / Chairman
Rishi Aurobindo School	Kolkata	Arjun Ghosh	Chairman of the Trust
Binuria Nimnabuniyadi Vidyalaya	Binuria (a village out of Kolkata)	Sukla Bhattacharya	Guardian of section of Kindergarten and Primary level children attending this school
NGOs			
All India Council for Mass Education and Development	Kolkata	Rajashree Biswas	General Secretary
All India Council for Mass Education and Development	Kolkata	Dilip Mukhopadhyay	Editor
Communication and Media People	Kolkata	Gautam Bose	General Secretary
Pratham Foundation	Kolkata	Animesh Chatterjee	Researcher
Ministry of Education			
Ministry of Education, West Bengal	Kolkata	Arnab Roy	Secretary
Primary Education Board, Birbhum District, West Bengal	Outside Kolkata	Raja Ghosh	Chairman

7.2 Appendix 2: Languages of India

Hindi:	is the official language of India; accent and dialect differ in different regions, but almost every Indian has a basic working knowledge of Hindi. It is written in a Devanagiri script.
Bengali:	is the official language of West Bengal, now spoken by nearly 200 million people in West Bengal and Bangladesh.
Telegu:	this is the language of Andhra Pradesh.
Marathi:	is an official language of Maharashtra. It has a fully developed modern literature.
Tamil:	is the state language of Tamil Nadu. Tamil literature goes back to centuries before the Christian era and is spoken by more than 73 million people. It belongs to the Dravidian language family.
Urdu:	is the state language of Jammu and Kashmir, spoken by more than 28 million people in India. Urdu and Hindi come from the same source, but Urdu is written in the Persian–Arabic script and contains many words from the Persian language.
Gujarati:	is the official language of Gujarat. 70% of the state’s population speak Gujarati, and it is the most widespread regional language not only in India but also abroad.
Kannada:	is a language of Karnataka and is spoken by 65% of the state’s population. It belongs to the Dravidian family.
Malayalam:	is the state language of Kerala. It is the youngest of all developed languages in the Dravidian family.
Oriya:	is a branch of the Indo–Aryan family and is the official language of the State of Orissa.
Punjabi:	is the official language of the State of Punjab. It is written in the Gurmukhi script, created by the Sikh Guru Angad.
Assamese:	is the language of Assam that is spoken by nearly 60% of the state’s population.
Maithili:	is mostly spoken in parts of Bihar and the eastern Terai region of Nepal.
Konkani:	is spoken in the Konkan region that stretches across Maharashtra, Goa, and Karnataka.
Bodo:	is the language spoken by the Bodo people of Assam and comes under the Assam–Burmese group of languages.
Dogri:	is mainly spoken by the people of the Jammu region.
Kashmiri:	although this language is considered to be the state language of Kashmir, only 55% of the state’s population speak Kashmiri.
Manipuri/Meitei:	is an official language of the state of Manipur.
Nepali:	is the official language of Nepal. It is also spoken in some northeastern parts of India.
Santhali:	is spoken by Santhal tribals of the Chota Nagpur Plateau (comprising the states of Bihar, Chattisgarh, Jharkhand, and Orissa).
Sindhi:	is spoken by a great number of people in the northwest of the Indian sub–continent, comprising parts of India and Pakistan. Indian Sindhi and Pakistan Sindhi are written in different scripts and are not therefore easily mutually comprehensible.
Sanskrit:	is the classical language of India that has now lost much of its value and significance in the modern world. It is also one of the oldest languages in the world and perhaps the oldest to be recorded. All the ancient scripts are found to be written in the same language. Though few people speak this language in modern India, it is still included in the official language list of the government of India.

7.3 Appendix 3: Acronyms

ASER:	Annual Status of Education Report
CBSE:	Central Board of Secondary Education
CBT:	Children's Book Trust
CISCE:	Council of Indian School Certificate Examination
DEE:	Department of Elementary Education
ECCE:	Early Childhood Care and Education
GER:	Gross Enrollment Ratio
ICDS:	Integrated Child Development Services
ICT4E:	Information and Communication Technology for Education
ISC:	Indian School Certificate
LOI:	Language of Instruction
MHRD:	Ministry of Human Resources Development
NBT:	National Book Trust
NCERT:	National Council of Educational Research & Training
NER:	Net Enrollment Ratio
PTTI:	Primary Teachers' Training Institute
RTE:	Right to Education
SCERT:	State Council of Educational Research and Training
SSA:	Sarva Siksha Abhiyan (Education for All)
SWAN:	State Wide Area Network
U-DISE:	Unified District Information System for Education

7.4 Appendix 4: Right to Education Act vis-à-vis SSA/RMSA

Sarva Shiksha Abhiyan (SSA) was an effort to universalize elementary education by community ownership of the school system. The main objective of SSA is to provide useful and relevant elementary education (including retention) for all children in the age group of 6–14 years by 2010. Rashtriya Madhyamik Shiksha Abhiyan (RMSA) is an extension of SSA in the sense that it promises universal access to secondary level education to all (in the age group of 15–16 years) by 2017 and universal retention by 2020. While SSA and RMSA offer an operational framework for universalizing education, its provisions were used as general guidelines by each state to interpret and implement the schemes. The Right of Children to Free and Compulsory Education Act, 2009 (RTE) makes implementation of compulsory education legally binding on all states/union territories. The SSA had been launched in 2001–02 and states have since then started implementing the mission of SSA with the setting up of necessary infrastructure and operating guidelines. Hence, when RTE was enacted in 2009, one of the major challenges faced by each state was to align the existing rules/guidelines under SSA with the requirements of RTE. A comparative analysis of the various provisions of SSA and RTE throws up the following challenges before the State. (A) The first step in implementation of RTE in a state is notification of State RTE Rules in the official gazette. Such State RTE Rules may be framed in the lines of Central RTE Rules which have already been notified. The State RTE Rules must cover provisions for pre-primary schools/Anganwadis. (B) Every unaided school imparting elementary education is to be registered with the appropriate authority (e.g., District Inspector's Office) within a given timeframe. (C) Unaided schools are required to reserve 25% of the seats for children belonging to weaker sections and disadvantaged groups in the neighborhood. (D) The State RTE Rules should specify the limits of neighborhoods unambiguously for lower and upper primary schools. (E) Pupil-teacher ratio (PTR) is to be aligned to meet the guidelines of RTE. For example,

the SSA framework mentions that there should be at least two teachers in every primary school, irrespective of student enrollment, but RTE links the number of teachers with student enrollment. (F) Every primary school must have provisions for a library, games equipment, and play materials. Neighborhood school norms require a re-look at the present system of Sishu Siksha Kendra (SSK) in unserved habitations. (G) The RTE Act mandates that eventually elementary education must be provided by formal and recognized schools. All existing EGS centres (SSK and Madhyamaik Siksha Kendra [MSK] in West Bengal) should be converted to regular schools or closed down when children are mainstreamed into neighborhood schools. (H) The primary responsibility of monitoring the quality of education in a school rests with the School Management Committee (SMC). Hence, all other school-level committees (e.g., PTA, MTA) are to be closed. (I) No teacher can be appointed after August 2010 who does not possess the minimum qualification as per NCTE notification. (J) RTE (section 26) requires that teacher vacancies in government or government-aided schools should not exceed 10% of the total sanctioned strength. RTE also requires that teachers should not be engaged in non-academic activities other than for census, election, and disaster relief operations. Also school teachers should not be involved in private tuition.

Global Book Fund Country Study

KENYA

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1. Methodology

The Kenya country study was conducted under the supervision of International Education Partners (IEP) over the course of September 2015 – January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

IEP has considerable previous in-country experience of curriculum and teaching and learning material (TLM) issues in Kenya through its work with DFID and the World Bank on the free primary and secondary education projects and also research studies for the WB on the financing of secondary education and the development of education technology (ICT4E) in primary and secondary schools. A wide range of relevant documentation and reports on all aspects of local languages and TLM provision for primary schools in Kenya was collected via desk research and IEP's previous and current work in the country. A complete list of in-country interviews is provided in Appendix 1.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background and Education System

Kenya gained independence in 1963 and in 2015 had an estimated population of approximately 45 million with a projected annual population growth rate of 2.6% per year. Around 76% of the population live in rural areas.⁹² Kenya is divided into administrative units called counties, as seen in Figure 1.

Figure 1: Map of Kenya



According to the CIA World Factbook, adult literacy in Kenya is estimated at 78% of the population (the definition of literacy used is “age 15 and over can read and write a recognized language”), with male literacy at 81.1% and female literacy at 74.9%. The UNESCO Institute for Statistics notes a national per capita Income of US\$860 in Kenya and a poverty ranking of 147.

The structure of the education system provides for 8 years of primary education and 4 years of secondary education followed by 4 years of tertiary level education. Information regarding number of schools and total enrollment can be seen in Figure 2, and a comparison of public versus private school ownership is shown in Figure 3.

From 2009–2014, the average annual growth rate in ECDE schools was 1%, with private schools growing faster at 1.4%. Average school size increased from 57

⁹² CIA. (2015). World Factbook.

Figure 2: Number of Schools and Total Enrollments (MOEST 2014)

	Early Childhood Development Education (ECDE)	Primary	Secondary
Schools	40,211	29,460	8,784
Enrollment	3,019,866	9,950,746	2,331, 697

Figure 3: Public/Private Schools (MOEST 2014)

	ECDE	Primary	Secondary
Public Schools	24,768	21,718	7,686
Private Schools	15,443	7,742	1,048
Total Schools	40,211	29,460	8,734
Av School Size	75	338	264

to 75, probably caused by the Ministry of Education, Science and Technology (MOEST) mainstreaming pre-school education during this period. In the same period, the average annual growth rate in primary schools was 5.1%, with private primary schools growing faster at 12% compared with a public school growth rate of 3.2%. In 2014, private primary schools represented 26% of total primary schools. Average primary school size decreased from 401 to 338 over the same period.

As seen in Figure 4, in ECDE and primary, enrollments are close to gender equity, with a modest decrease in the proportion of girls' enrollments at secondary level.

2.2 Language Profile

Kiswahili and English are the two official languages of Kenya, with English operating largely as the language of government, business, and education and Kiswahili as the lingua franca for communication

Figure 4: School Enrollment by Gender (MOEST 2014)

	ECDE	Primary	Secondary
Boys	1,476,400	5,052,400	1,202,300
Girls	1,543,500	4,898,400	1,107,600
Total	3,019,900	9,950,800	2,331,700
Gender Parity Index	1.05	0.97	0.92

Figure 5: Languages of Kenya by status category (Number)⁹³

	Number	Definition
Total	68	
National	2	The language is used in education, work, mass media, and government at the national level.
Educational	10	The language is in vigorous use, with standardization and literature being sustained through a widespread system of institutionally supported education.
Developing	34	The language is in vigorous use, with literature in a standardized form being used by some though this is not yet widespread or sustainable.
Vigorous	15	The language is used for face-to-face communication by all generations and the situation is sustainable.
Shifting	2	The child-bearing generation can use the language among themselves, but it is not being transmitted to children.
Moribund	3	The only remaining active users of the language are members of the grandparent generation and older.
Nearly Extinct	1	The only remaining users of the language are members of the grandparent generation or older who have little opportunity to use the language.
Extinct	1	The language is no longer used and no one retains a sense of ethnic identity associated with the language.

between different local language groups. In addition, the SIL *Ethnologue*⁹³ lists 68 other local languages which tend to be the languages commonly spoken at home and within communities (Figure 5).

As a general rule, multilingualism is most marked in urban areas. In rural areas, it is more likely that the majority of the population will not be fluent in English or even Kiswahili. Most local languages belong to two broad language families—the Niger-Congo (Bantu branch) and the Nilo-Saharan (Nilotic branch)—spoken by the country’s Bantu and Nilotic populations, respectively. The Cushitic and Arab ethnic minorities speak languages belonging to the separate Afro-Asiatic family. There are also minorities of Hindi speakers and English speakers. The largest of the local languages in terms of numbers of speakers are listed below:⁹⁴

- ▶ Kikuyu* – 7.18 million
- ▶ Dholuo* – 4.86 million
- ▶ Kamba* – 3.96 million
- ▶ Somali – 2.39 million
- ▶ Ekegusii* – 2.12 million
- ▶ Kipsigis – 1.92 million
- ▶ Kimiiru* – 1.66 million
- ▶ Lubukusu – 1.43 million
- ▶ Kalenjin – 1.2 million
- ▶ Turkana – 1.0 million
- ▶ Nandi – 0.95 million
- ▶ Kigiryama – 0.94 million
- ▶ Maasai* – 0.84 million
- ▶ Kiambu* – 0.43 million

⁹³ Lewis, M. P., Simons, G. F., and Fennig C. D. (Eds). (2015). Languages of Kenya: An Ethnologue Country Report 18th Edition, SIL.

⁹⁴ Ibid.

Many of Kenya's local languages have established orthographies—usually based on the Latin script, dictionaries, and some level of a supportive literature. An * in the list above indicates local languages that are taught in at least some primary schools in the districts of Kenya where they are spoken. Literacy rates in local languages vary from virtually zero in many minor languages to 10–15% in more popular languages on up to 60%+ in Kikuyu. The complexity of the distribution of local languages is illustrated by Kakamega District where the *Ethnologue* specifies that 12 different local languages are in use and Garissa District where 10 different local languages are spoken. In some Nairobi schools, urbanization is reported to have created classes which may contain speakers of up to 10–20 different local languages. In these circumstances, few children will learn in their mother tongue.

The National Library of Kenya maintains primary level reading books in its 60 regional branches in 48 local languages in addition to Kiswahili and English language reading books. The local language reading books are written by local authors and published by local Kenyan publishers. Kenyan publishers report that publishing reading books for the larger ethnic groups (e.g., Kikuyu, Luo, Kikamba, and Kisii) is commercially viable for sale to the various parental language markets. Publishing in Kalenjin and Maasai is also viable in terms of numbers of speakers, but unfortunately there are many dialects in these languages which restrict readability and may cause confusion.

For those languages which are not considered to be commercially viable, the Kenya Institute for Curriculum Development (KICD) with financial and technical assistance from UNICEF and other donors/NGOs has produced some reading books for some of the minor languages. However, many local languages remain without any primary level reading books. There are no subsidies available to commercial publishers to support reading book authorship and publishing for minor local languages, though

a proposal for subsidies to support publishing in minor local languages has been presented to KICD by the Kenyan Publishers Association (KPA) but with no positive response. Recently, Innovations for Poverty Action (IPA) has started to work with Kenyan publishers, using subsidies and/or minimum guaranteed purchases to produce local language reading books for distribution to pre-schools and lower primary grades as part of its Encouraging Multilingual Early Reading as the Groundwork for Education (EMERGE) project.

2.3 Language of Instruction (LOI) Policy

MOEST LOI policy is that the language of instruction for early grades, i.e. pre-school through Grade 3, should be the language of the catchment area. Thus, if a school is in central Kenya, it would normally be Kikuyu; if in Nyanza, it would be Luo; if in southeastern Kenya, it should be Kikamba, etc. In practice, this standard is not generally adhered.

Due to the great number of ethnic groups and local languages, this policy has been difficult for many schools—perhaps a majority—to implement in lower primary grades and pre-schools. The mother tongue section of the Orange Book⁹⁵ lists only three approved mother tongue language courses for Grades 1–3: Kikuyu, Luo, and Kikamba. There are no approved courses in any other local languages, and the majority of Kenyan publishers do not attempt to publish local language course materials. English is the official language of instruction for all classes from Grade 4 onwards. English and Kiswahili are both compulsory subjects in all primary grades.

While English is the official language, Kiswahili is the national language. Despite widespread public opinion that Kiswahili should be the LOI throughout primary grades, perhaps with a transition to English after Grade 6, there is no sign of a national policy emerging in support of a Kiswahili LOI. This is especially the case in urban areas where it is difficult to introduce

⁹⁵ The Orange Book is the annually produced *Approved List of School Textbooks & Other Instructional Materials for ECDE, Primary Schools & Teacher Training Colleges*.

local language LOIs. As a result, teachers widely opt to use English as the LOI from nursery through all other levels, often with strong support from parents who perceive English to be the language of economic advantage for their children. In many cases, the result is a lost generation that do not develop language mastery in English, Kiswahili, or a local language. The increasing number of vernacular radio and television stations throughout the country may change this situation, but it is too early to be certain.

Rural teachers tend to copy urban schools and also have parental pressure to use and teach English in pre-school and the lower primary grades. Local languages are not examined, and the pupils will sit their final exams in English for all subjects except Kiswahili. Few teachers have genuine mastery of reading and writing in their mother tongue even if they speak it fluently because it is not often taught as a subject, and most teachers cannot accurately read or write local languages.

In lower primary grades, the language of reading and writing in the classroom is generally English, but the language of speaking and listening will often be a local language if there are teachers who speak the dominant local language. Teacher mobility and postings policy throughout the Kenyan education system mean that there will be schools where there are no speakers of the local language. The considerable body of research that demonstrates the fact that early learning in a language easily understood by teachers and students improves student achievement and even has a favorable impact on learning in English in later grade levels is not widely known or understood by parents or teachers.⁹⁶

If support for the use of local languages as LOIs in Kenya is to be achieved, there is a need for a major information campaign aimed at parents and primary teachers and strongly supported by the MOEST to explain the benefits and advantages of early grade learning in local dominant languages. There are, however, major implementation problems to be

overcome if the concept becomes widely accepted. These include the issue of the LOI in cosmopolitan urban schools, the complex mix of different multiple local languages in some rural districts, the variety of dialects in some local languages, the need for a comprehensive program of pre-service and in-service teacher training in local languages, and the requirement to upgrade authorship and publishing capacity to develop local language course materials and reading books.

3. Current Print and Digital Reading Book Provision

Kenya has a long-established policy of decentralized, school-based selection and ordering of the TLMs to be used in primary and secondary schools based on the provision by the MOEST of annual per capita budgets paid in cash into school bank accounts. Schools select the titles and quantities of the TLMs that they wish to procure up to the limits of their annual budget from an annually produced *Approved List of School Textbooks & Other Instructional Materials for ECDE, Primary Schools & Teacher Training Colleges* (popularly known as the Orange Book). After selection of the required TLMs, schools order them from a bookseller of their choice based on competitive discounts offered and services provided. These services include sample copy rooms to aid school selection decisions and delivery free of charge direct to most school premises. This policy is possible because of the highly developed wholesale and retail bookseller network in Kenya which provides national coverage to schools even in rural and remote areas of the country. This is uncommon in sub-Saharan Africa. It not only provides an effective and reliable delivery mechanism to schools but also provides outlets for the sale of readers (including local language readers) to parents, thus supporting the development of commercially viable publishing of reading books in local languages.

It is worth noting that because schools don't pay booksellers until their orders have been fully

⁹⁶ UNESCO. (2008). *Mother Tongue Matters: Local Language as a Key to Effective Learning*. Paris: UNESCO.

and correctly delivered, the levels of successful accountable delivery of school TLM orders tend to be high. The MOEST requires supplying booksellers to stamp page 5 of all books for Grades 1–3 and page 13 of all other books indicating the date of issue, the Kenya Booksellers and Stationers Association (KBSA) membership number, and the business name as an important procurement regulation. However, there have been examples of booksellers colluding with schools to deliberately undersupply school orders and to divide the cash benefit. Regular and meticulous supervision are required to prevent this and other abuses, but inspection budgets are inadequate to support such activities. Schools have been reported to prefer the system of bookseller supply and delivery to the previous system of state-funded supply via the now-closed Kenya School Equipment Scheme (KSES), because the KSES frequently supplied incorrectly and had a reputation for not bothering to correct errors or replace damaged deliveries.⁹⁷

The preparation and publication of the annual Orange Book of approved titles is the responsibility of the KICD (previously Kenya Institute of Education [KIE]). It has sections for Pre-schools, Primary Pupils and Teachers' course books, Reference Books, Dictionaries, Atlases and Supplementary Reading Books comprising both fiction and non-fiction books. In 2015, the Orange Book listed 1,969 approved primary level reading books in English (of which 235 were non-fiction), 497 Kiswahili reading books, but only 34 local language reading books (of which 10 were Tusome books authored by KICD and published by the Kenya Literature Bureau [KLB], a government owned parastatal publisher).

Unlike Rwanda, which also has a system of decentralized, school-based selection and ordering, there is no minimum level of finance that has to be spent by schools on supplementary materials and the development of school libraries, so it is not possible to assess the level of reading books availability in schools. However, the list of approved reading books

has been operational for at least 15 years, and schools have been provided with funds for the purchase of TLMs, including reading books, for the same period. Unfortunately, the decline of the per capita budget in terms of purchasing power since 2002 has concentrated school ordering increasingly on textbooks; most primary schools still have some level of reading book stocks, although mostly English and Kiswahili language books rather than local language books.

Most serious Kenyan education publishers are now developing e-content and making their textbooks and reading books available in digital formats either for direct sale or for sale via eKitabu, the Nairobi-based digital retailer who has an online catalogue of 5,000 reader titles of which 1,000 are in local languages. At present, the main publisher market for digital editions is parents, and it is therefore small, but the promised major investments by government in primary ICT4E makes digital provision becoming at least a significant part of the primary school system a real possibility in the next few years. There has been no obvious consideration of reflow implications. eKitabu estimates that only 10% of parents and primary schools have access to devices that can download digital reading materials. Elite state schools and private schools represent its current main market, which is growing, but only slowly. Outside Kenya, eKitabu also supplies private schools in Uganda, Rwanda, and Ghana. eKitabu now has an app with digital versions of Kenyan textbooks which provides a low-cost option for accessing textbooks by allowing students from low and middle income families to rent by the page or by the chapter, depending on their needs and budget.

The Kenya Computer Exchange provides computers to underfunded schools through donations from private and corporate sponsors. The Kenya Education Fund, which implements the program, requires these recipient schools to allow selected students from disadvantaged backgrounds to attend the school for free. Bridge International Academies utilizes the

⁹⁷ McCall, J. (2001). *SPRED 3: Consultancy for Financial and Procurement Tracking – 1st Monitoring Report*. PricewaterhouseCoopers for DFID.

“Academy in a Box” model which emphasizes high-quality education through standardization for its chain of 300 low-cost private schools. Bridge has developed scripted lesson plans and step-by-step instructions available on tablets; these allow less qualified or less experienced teachers to conduct lessons they may typically not be able to and reduce the time teachers spend on non-instructional activities. With Eneza Education (MPrep), students in remote areas of Kenya can access quizzes and learning tools related to the national curriculum via SMS; they also receive feedback and tips based on their answers.

4. Country Findings and Market Gaps

4.1 *Authorship and Publishing Capacity*

Kenya has one of the three most developed and professional publishing industries in sub-Saharan Africa. 89 publishers are listed as members of the Kenya Publishers Association (KPA). Of these, 88 are fully owned Kenyan companies and one is a fully owned branch of a UK publishing house (OUP). Some of the publishers are local management buyouts of large UK educational publishing houses. Kenyan publishers are regular bidders for donor and government funded textbook and reader contracts in neighbouring countries such as Uganda, Ethiopia, and Rwanda. Kenyan publishers may lack experience in conceiving and publishing for the new trend in child-centered, competency-based national curricula, but with proper guidance through well specified bid documents they are considered to be capable of rapidly developing these skills. Similarly, they have a large back-list of primary level reading books—mostly in English and Kiswahili but also in some of the more popular local languages. The relative paucity of primary reading books in local languages is a result of school and parental purchasing preferences for English and Kiswahili titles. There is evidence to indicate that Kenyan publishers are capable

and willing to embrace local language primary textbook and reader publishing so long as a viable market exists.

Publishers consulted for the case study expressed significant concern over the ongoing Tusome Project. As part of this project, USAID and DFID are collaborating with the MOEST to publish and distribute approximately 12 million books and improve the reading outcomes of 5.4 million children in Grades 1 and 2 by 2018.^{98,99} The subjects of focus are primary English, Kiswahili, and Mathematics, with print runs of between 1.5 million to 2 million copies per level per subject. The publishers consulted, including the President of the KPA, remarked that the books were developed and published by RTI International (RTI) without the involvement of any Kenyan publishers.¹⁰⁰ In mid-2015, publishers consulted noted that bookshops started returning publishers’ textbooks that they had ordered for schools. KPA reported that bookshops had tried to sell the books, but schools had informed them that they had “instructions from the MOEST to use no other textbooks except for the free ones from Tusome.” As a result, publishers claim that they were left with large overstocks and financial losses. Primary Kiswahili, English, and Mathematics are core subjects, and the KPA and KBSA claim that the distribution of millions of free textbook copies into the market has greatly destabilized Kenya’s publishing and bookselling industries.

Kenya’s publishing and bookselling industries are very successful, major stakeholders in education, and have provided efficient, cost-effective, and accountable supply/delivery services to schools in every part of the country for many years. The publishers and booksellers also provide employment for thousands of Kenyans. The book trade claims that the Tusome Project has created uncertainty and thus has inhibited investment in new publishing projects. There is concern that donors will continue to fund free textbooks to the MOEST beyond 2018; there is also concern that donor intervention has already enabled the MOEST to re-introduce state textbook publishing after donors

⁹⁸ RTI International. (2015). Tusome Early Grade Reading Activity.

⁹⁹ USAID. (2015). Kenya Tusome: The Importance of Text. 2015 Global Education Summit.

¹⁰⁰ However, it should be noted that others believe that USAID, the MOEST, and others “actively reached out” and “worked together” with the KPA. Source: USAID. (2015).

withdraw simply by taking over the publishing rights for the Tusome textbooks and reprinting them. There is also concern about the strength of the book trade following the conclusion of the project. By focusing the supply of free textbooks only on government schools, USAID/DFID has also introduced parallel learning materials (and thus confusion), as private schools use materials from publishers and public schools from USAID/DFID.

Publishers consulted remarked that Tusome has replaced competitive textbook publishing and school-based selection and choice with monopoly donor-funded textbook publishing. It has also undermined a successful private enterprise book trade. However, donors note that there is now 1:1 textbook provision in language and mathematics in Grade 1 and Grade 2 in every Kenyan public school; moreover, the larger gains of the education and curriculum reform movements in Kenya which were served by the Tusome Project must also be recognized. That said, there is a feeling among those interviewed that the concern and destabilization could have been avoided by working with and through a competent local book trade, rather than channeling donor funding through an international organization.

RTI is now in the process of selecting reading books to supply to primary schools, and at least some of these will come from Kenyan private sector publishers. Publishers consulted who are engaged in these discussions claim that the discounts demanded by RTI are punitive and effectively remove their profit margins. Ultimately, however, despite the particulars of the Tusome Project, the strength of the publishing, printing, and bookselling sector in Kenya is clear. A joint review involving the donors, MOEST, and book trade representatives should be initiated to discuss outstanding issues and resolve the way ahead on the basis of mutually acceptable collaboration.

4.2 Printing

Kenya has a well-equipped and competent printing and binding capacity, and for many years most Kenyan publishers manufactured their educational titles locally. In recent years, however, there has been

a movement to print in international printing centers, with Abu Dhabi, Mauritius, India, and Malaysia as favoured locations. Kenyan publishers report that international printing can be up to 15% cheaper and is generally more reliable in delivering on schedule.

Kenyan printers offer competitive credit terms to encourage publishers to print locally. In effect, this means that many Kenyan printers are prepared to offer up to 30 days credit as an inducement to print locally; some publishers have reported that they have been able to negotiate longer credit periods on the understanding that a majority of their manufacturing will be performed in Kenya. Despite these credit inducements, an increasing amount of manufacturing is being placed overseas.

4.3 Primary Reader Specifications

Stakeholders consulted report that typical reader specifications are as follows:

- ▶ Text paper: 80gsm wood free;
- ▶ Cover card: 240 gsm one-sided art card;
- ▶ Finish: UV varnish;
- ▶ Binding Style: saddle-stitch with rust-less wire stitches up to 96 pages.

Appendix 2 provides a publisher's case study on the price impact of extended reading book print runs.

4.4 Procurement

TLM procurement in all Kenyan government schools—primary and secondary—is by competitive selection of materials by individual schools from the official list of approved textbooks and supplementary materials which is managed by the Kenya Institute for Curriculum Development (KICD). Every 5–6 years the KICD issues a call for publisher submissions to evaluate as the basis for the next Orange Book List. Schools order every year from the titles listed in the Orange Book. When the school order is completed, schools then select their bookseller supplier on the basis of discounts and services offered, which usually include free delivery to schools. The comprehensive national bookselling

network means that most schools, even in rural and remote areas, have a choice of bookseller suppliers.

Stakeholders reported that the Tusome Project has sidelined school-based selection and ordering for lower primary language and maths textbooks, as well as for lower primary readers.

4.5 Distribution

Kenya probably has the most comprehensive national network of effective wholesale and retail booksellers in sub-Saharan Africa comprising at least three major wholesalers and up to a thousand retailers. It provides genuinely national coverage to schools, even in rural and remote areas of the country, including at least one retailer specializing in supplying Somali nomadic schools. This network is almost unique in sub-Saharan Africa. It not only provides an effective and reliable delivery mechanism to schools but also provides multiple outlets for the sale of textbooks and readers—including local language readers—to parents, thus supporting the development of commercially viable publishing of supplementary reading books in English, Kiswahili, and local languages.

Unfortunately, many schools have serious debt problems that they handle by paying booksellers very late (or sometimes not at all); according to those interviewed, booksellers then have no alternative but to pay publishers late, and the vicious debt cycle is repeated year after year.

4.6 Teacher Training Issues

All schools interviewed requested more training and guidance on the techniques to teach and achieve early literacy as well as the use and effective use of reading books in class. If local languages as LOIs are to be extended, teachers also requested more training in reading and writing in selected local languages.

4.7 Financing

In 2015, the primary school per capita total allocation was Ksh1200 (US\$13.50). This amount has not

changed since 2002, and its purchasing power has been eroded by inflation and currency devaluations. The government proposed an increase in 2015, but this has not materialized. Out of this, only Ksh350 (US\$3.94) is allocated for TLMs per child per year. The introduction of 16% VAT on books, which has to be paid from school funds, has made the purchasing power situation worse. The funds are almost always disbursed late and are split between different tranches so that orders are made piecemeal.

Non-inspection of the usage of the funds by schools has also allowed head teachers to misappropriate the funds with impunity. The misappropriation of textbook funding by government and district officials, which was a major scandal a few years ago, continues. Every time an MOE/District official visits a school, they must be given a token for fuel, etc., by the school, which is paid from the per capita allocation.

4.8 School Management and Usage

School interviews suggest that basic TLM management system requirements are known but not universally implemented consistently. Reader book life estimates varied from 9 months to 5 years. TLM management guidelines were issued 10+ years ago.

There are no MOEST guidelines for teaching literacy, for using readers in class in support of literacy, or for developing school and classroom libraries. Interviewed schools had libraries that allowed students to borrow books for home use, which suggests sufficient reading books in school to support borrowing. There were varying loss and damage policies. All schools interviewed requested more training and guidance on the achievement of early literacy and the effective use of reading books in class.

4.9 Digital Opportunities

The MOEST, in collaboration with the Rural Electrification Authority, has made efforts in recent years to connect schools to power as support to the policy of integrating ICT into the education system and making schools more user-friendly for ICT4E.

Data from the 2014 school census indicate that only 39.4% of public primary schools had access to power against 57.4% for private schools. But the interview with MOEST estimated that only 10% of rural primary schools had reliable power access. No official data is available on primary school access to effective internet connectivity, but MOEST informal estimates suggest that only 10% have access to reliable internet connectivity with bandwidths sufficient to download text and illustrations files. MOEST also estimates that 90% of primary schools do not have access to ICT maintenance services. MOEST has not undertaken a total cost of ownership (TCO) analysis and has no clear idea of the recurrent costs of its current ICT4E policy.

Free laptops for students was one of the election promises of the Jubilee Coalition, but delivering on the promise has run into problems. Tendering started in August 2013, with the government requesting bids for the provision of laptops, printers, and projectors for all public schools in the country. At that time, the government had announced that it had allocated KSh53.2 billion (US\$596,736,000)¹⁰¹ for the project which was supposed to be rolled out in four phases. The first phase was for 1.2 million laptops for all Grade 1 students. The bid awarded to an Indian supplier was cancelled in March 2014 for procurement irregularities. Following the cancellation of this contract, there was uncertainty about the next steps in gearing up ICT provision in schools. However, in December 2015, the ICT Ministry announced that it was releasing bid documents to a restricted list of 10 bidders' consortia (of which 7 contained Kenyan universities) for a US\$170 million bid for the first stage of its national ICT4E project which will comprise the procurement and primary school installation and networking of 1.2 million laptops (one for each Standard 1 student) and the development of e-content. Bids had to be submitted by the end of January 2016, and there is hope that the project might be implemented late in 2016 or early in 2017. The Government of Kenya has very ambitious plans for ICT4E in Kenya, and claims that it can finance the costs internally now that oil, natural gas, and other

valuable minerals have been discovered in Turkana. The ICT4E budget now exists on paper in millions of US dollars. It is proposed that approved digital content will be availed by schools from the cloud so that nobody, including KICD, will have a monopoly (as would have been the case earlier when KICD wanted the laptops to be pre-loaded with their content). When the project eventually takes off, there is an assumption that as many schools as are connected to electricity or use alternative power sources will have internet access and will be provided with devices.

5. Discussion and Opportunities for a Global Book Fund

Clear Financial Need

The MOEST financing for textbooks and readers has not been increased since 2002, and the purchasing power of the annual per capita budgets has been seriously eroded. The recent imposition of a 16% VAT on books, which has to be paid by schools on their TLM orders, has increased pressure on available funds. There is thus an urgent need for an increase in MOEST funding for TLMs. The MOEST claims that oil, gas, and mineral discoveries in Turkana would enable the mid-term sustainability of any initial GBF investments.

Availability of titles and production capacity

For the past 15 years the MOEST has maintained, via the Orange book, lists of approved primary reading books in English, Kiswahili, and three local languages for decentralized selection and procurement by schools using their annual per capita budgets. Most primary schools will therefore have some level of reading book stock, often in sufficient quantity to sustain small school libraries which will lend to students for home use. Literacy and numeracy are MOEST priorities, hence MOEST support for the Tusome Project. Thus, it is very likely that the MOEST

¹⁰¹ Calculated using exchange rates on August 31, 2013 via oanda.com.

would be supportive of a GBF-funded supply of hard copy primary reading books to primary schools.

Kenya is fortunate to have a successful and well-developed educational book trade comprising effective and professional publishers, booksellers, and printers which has taken many years to achieve. Any future GBF intervention should be designed to support existing publishing capacity and not undermine or replace it through the involvement of foreign publishers.

Opportunities and limitations of digital market

If the MOEST plans for major investments in ICT4E for primary schools to come to fruition in the next two years, there is probably a framework for some level of provision and use of digital reading books. For schools, the main constraints will be access to power and effective and affordable connectivity, particularly in rural areas, as well as the need for widespread teacher training. However, the development of digital media is likely to increase the domestic digital divide (DDD). Publishers are already investing in digital textbooks and reading books, though without concern for the reflow issues needed to serve a range of different devices, and there is an operational e-book retailer supplying parents and schools in Kenya and neighbouring countries.

Perhaps of greater concern is the fact that Kenya has not yet undertaken a comprehensive TCO analysis for ICT4E and thus has no clear idea of the forward cost implications of its ICT4E policies. Huge sums of money are ticketed for future hardware investment, which could divert funding away from other essential educational budget heads such as textbooks and reading books. In addition, the basic school-level operational costs of ICT4E—power, connectivity, maintenance, consumables, teacher training, etc.—have not yet been calculated, although they are known to be expensive.

Creating demand for underserved language books

MOEST policy on the use of catchment area local languages as LOIs in lower primary grades is largely ignored, partly as a result of strong parental preferences for English and Kiswahili and partly through the difficulty many schools face in selecting a local language in complex, multi-ethnic/linguistic communities in districts and, increasingly, cosmopolitan urban areas. In the short term, GBF-funded reading book supplies will be dominantly required in English and Kiswahili with minor quantities of Kikuyu, Dholuo, and Kikamba books.

There are many underserved local languages in Kenya, but enhancing the use of these languages will require an intensive public information campaign on the positive benefits of local languages and teacher training to increase teacher skills and knowledge in reading, writing, speaking, and listening in these languages. Even with these actions there will remain challenges surrounding local language selection by schools relative to potential friction among ethnicities/tribes. It should always be borne in mind that local languages are often competitive, and the selection of one language over another might create resentment and bad feelings.

Lastly, Kenyan teachers—although frequently considered to be better trained than teachers in many other SSA countries—would need more training in literacy and numeracy teaching, techniques in using reading books effectively in the classroom, and in managing book stocks.

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7. Appendix

7.1 Appendix 1: Interview List

Category	Organization	Contact
Donors	USAID Kenya	Lilian Gangla
	DFID Kenya	
Ministry of Education (MOEST)	Ministry of Education (MOEST)	Leah Rotich
	Ministry of Education (MOEST)	Onesmus Kiminza
	Ministry of Education (MOEST)	Margaret Murage
Ministry of Culture	Department of Culture: Libraries	Stephen Mau
	Kenya National Library Service	Richard Atuti
Publishers	Longhorn Publishers	Geoffrey Gichuki
	Phoenix Publishers	John Mwazemba
	Mountain Top Publishers	Lawrence Njagi
	Moran Publishers	Naima Kassim
Printers	The English Press	Kalpan Patel
Implementer	Centre for British Teachers (CFBT)	Mark Rotich
	Worldreader	Joan Mwachi Amolo
Urban State Schools	Racecourse Primary School (Nairobi)	Anne W Atsyaya
Urban Private Schools	Total Care Academy (Nairobi)	Anne Kamau
Rural Schools	Waguthu Primary School (Kiambu)	Margaret Kimani
Rural Private Schools	Karen Academy (Githurai)	
Booksellers/Distributors	Laxmi Booksellers (Nairobi)	Harish Vekaria
	Textbook Centre (Nairobi)	Suleiman Gakuria
	eKitabu (eBook Distributors)	Will Clurman

7.2 Appendix 2: Kenya Primary Reader Case Study

This case study, provided by a Kenyan publisher, is based on a recently published primary Grade 1 reading book in Kikuyu. The print run of only 2,000 copies is based on expected commercial sales to parents via the bookshop network and assumes minimum sales to MOE/schools.

Specification: 16 pp, 4-color, 80 gsm wood-free text paper, 240 gsm one-sided art card cover, UV varnish finish, 2 stitch saddle-stitch binding. This is

a typical durable lower primary specification with an expectation of a 4-year-plus book life.

Current Retail Price: US\$1.36 based on a print run of 2,000 copies and 25% bookseller discount.

Revised Specification: Physical production specifications as above. Print run 25,000 assuming a GBF bulk purchase with a guaranteed payment period of 30 days from delivery. This is equivalent to approximately 1 copy per primary school.

Revised Prices based on Revised Specifications:

For delivery to MOE for MOE to undertake delivery to schools = US\$0.68, i.e. this represents a price reduction of 50%. For publisher delivery direct to schools = US\$0.82, i.e. cost of delivery to schools is US\$0.14 per copy, or 20%.

Current Currency Exchange Rate: KSh102 = US\$1

Main Factors in Price Reduction:

- ▶ Extended print run to amortize origination costs and negotiate best printing and raw materials prices
- ▶ Guaranteed fast payment, thus no risk and minimum financing costs
- ▶ Bulk purchase, thus fast return on investment

Maximum Print Run Cost Reduction Possibilities:

With print runs of 50,000+ the best prices achievable on current specs would be US\$0.61 for direct supply to MOE and US\$0.75 for publisher supply to schools. This demonstrates the plateau effect of increased print runs on prices.

Global Book Fund Country Study

NIGER

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1. Methodology

The Niger country study was conducted by Mamadou Aliou Sow, consultant for Results for Development Institute (R4D), with the assistance of Alzouma Issoufi, linguist and publisher, over the course of October 2015 – January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

Research was conducted at the level of public institutions, private organizations, and associations working in education and publishing of textbooks and reading books in mother tongue languages for primary grades. The desk review specifically focused on the analysis of technical reports produced by the ministries of education, non-governmental organizations (NGOs), and donors in recent years on policies and strategies regarding mother tongue languages, curriculum reform for primary schools, production of textbooks and other reading materials, introduction of information and communication

technology (ICT) in schools, etc. Interviews with the different actors of the book chain (writers, publishers, printers, booksellers, librarians, educational managers, literacy NGOs, school managers, etc.) were also undertaken to identify challenges, constraints, and opportunities that arise in planning, design, production, procurement, distribution, financing, and use of textbooks and reading books. Data was collected through predesigned questionnaires by type of stakeholder at each step in the book chain (as seen in Figure 1). A complete list of interviewees can be found in Appendix 2 of this report.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

Niger is a vast, landlocked country that covers an area of 1,267,000 km²,¹⁰² of which three quarters of the territory is desert. According to the data of the population general census in 2012, Niger’s population is estimated at 17,129,076 inhabitants, with more than 60% under the age of 15. The country is characterized by a population growth which is 3.2% on average per

Figure 1: Number of interviews by stakeholder category

Structures / actors	Persons met
Ministry of primary education and literacy	9
Ministry of culture (librarians)	2
Ministry of secondary education	1
Bilingual primary schools	2
Writers in local languages association	1
Publishers	4
Printers	2
Booksellers & national association	3
Education NGOs	2
Donors	3

¹⁰² Document de Stratégie, Programme sectoriel de l’Éducation et de la Formation (PSEF), 2015–2024, MEP/A/PLN, Niamey, 2013

year, which will increase the school-age population by about 60% between 2010 and 2024. The young population and high population growth should therefore exert considerable pressure on the Niger education system by 2020.

Niger is a very poor country; it ranks 187th out of 187 countries in the 2014 United Nations Development Programme (UNDP) human development index, with a gross domestic product (GDP) per capita of \$769 dollars.¹⁰³ Thus poverty among the population is still important in the country (48.2%).¹⁰⁴ Development aid as grants and concessional loans contribute to about 30% in the country's budget.¹⁰⁵ In the field of ICT services, the telephone service penetration rate improved slightly from 33% in 2013 to 35.3% in 2014.¹⁰⁶ The household access to electricity grew regularly from 9.5% in 2012 to 10.32% in 2014.¹⁰⁷

2.1 Overview of basic education context

Over the period 2009–2014, basic education has made significant progress in access and coverage. However, quality education performance is still very low. During the last decade, the gross enrollment ratio (GER) in primary education has more than doubled, from 36% in 2001 to 71.3% in 2014. There are still marked disparities between girls and boys, between

urban and rural areas, and between regions in terms of access and retention of all boys and girls of school age to school¹⁰⁸.

Niger is one of the countries with the highest illiteracy rates, and the highest in the sub-region, standing at nearly 70% for the population aged 15 and over. The dropout rate is a concern and is around 43% of enrolled learners.¹⁰⁹ General statistics on number of schools, enrollment, and number of teachers is located in Figure 2.

Since 2006, the Ministry of Education (MOE) began to support some of the children aged between 9 and 14 years not attending schools or early dropouts. Their number is estimated at more than 2,156,864 out-of-school youth.¹¹⁰ This is where modern “Koranic schools” come in (there are currently more than 54,000 Koranic schools in the country, more than twice the number of formal primary schools),¹¹¹ supported by the NGO EIRENE-Sahel and the MOE, with funding from the European Union and others.

2.2 Language of Instruction (LOI) policy

In 1972, Niger began experimenting with teaching in national languages, and today several of its languages serve as mediums of instruction in public bilingual

Figure 2: School statistics

Levels (all grades)	Students	Teachers	Schools
Primary (grades 1–6)	2 162 424	44 328	15 900
Secondary 1 (grades 7–10)	413 380	11 781	1050
Bilingual schools	112 500	3000	750

Source: Ministry of Primary Education, MEP/A/PLN/EC, 2013–2014

¹⁰³ Document d'évaluation du projet d'appui à une éducation de qualité (PAEQ1), Banque mondiale, Washington, 2014

¹⁰⁴ Enquête démographique et de santé (EDS), Niamey, 2012

¹⁰⁵ Document d'évaluation du projet d'appui à une éducation de qualité (PAEQ1), Banque mondiale, Washington, 2014

¹⁰⁶ Données socio-économiques du Niger, Ministère du Plan, 2014

¹⁰⁷ Ibid.

¹⁰⁸ Annuaire statistiques, MEP et MES 2013–2014

¹⁰⁹ Document de stratégie, PSEF, 2014–2–14, Niamey, 2013

¹¹⁰ Rapport éducation non formelle, Niamey, 2013

¹¹¹ Données de la direction de l'éducation non formelle, Niamey, 2015

Figure 3: Status and distribution of national languages as languages of instruction

Language	Speakers in Niger	Other countries covered	Status
Hausa	55.6%	Niger, Nigeria, Chad, Cameroon, Ghana, Sudan, Libya, Burkina Faso	National language (education and literacy)
Songhay-zarma	19.5%	Niger, Benin, Nigeria, Mali, Burkina Faso	National language (education and literacy)
Fulfulde	8.3%	Niger, Nigeria, Cameroon, Chad, Benin, Mali, Burkina Faso, Senegal, Guinea, Mauritania	National language (education and literacy)
Kanuri	4.8%	Niger, Nigeria, Cameroon, Chad, Libya	National language (education and literacy)
Tamajaq	8.4%	Niger, Algeria, Burkina Faso, Mali, Mauritania	National language (education and literacy)
Gulmancema	1.97%	Niger, Burkina, Togo, Benin	National language (education and literacy)
Tubu	0.1%	Niger, Chad, Libya	National language (literacy)
Arabic	1.2%	Niger, Chad, Libya, Algeria	National language (education and literacy)
Buduma	0.05%	Niger, Nigeria, Cameroon, Chad	National language (education and literacy)
Tasawaq	0.08%	Niger, Algeria, Mali	National language (literacy)

Source: Alzouma Issoufi, 2015

schools. The educational policy letter initiated in 2012 by the government to frame activities development of this sector over the 2013–2020 period indicates the need for the “promotion of national languages through the adoption and implementation of an effective strategy for a progressive and efficient generalization of bilingual education.”

Politically, 10 local languages have been recognized as national languages by the government. These are: Hausa, Songhai-Zarma, Fulfulde, Kanuri, Tamasheq, Gulmancema, Tubu, Arabic, Buduma and Tasawaq¹¹² (as seen in Figure 3). However, Fulfulde, Hausa, Kanuri, Tamajaq, and Zarma-Songhay are

the languages that have been equipped with tools (spelling, grammar, lexicons, dictionaries) to use in teaching. Therefore, in addition to French (the country’s official language), six national languages are used as medium of instruction (LOI), namely: Arabic, Fulfulde, Hausa, Kanuri, Tamajaq and Zarma-Songhay.¹¹³ The Arabic used in the Franco-Arab schools is the equipped international literary Arabic.

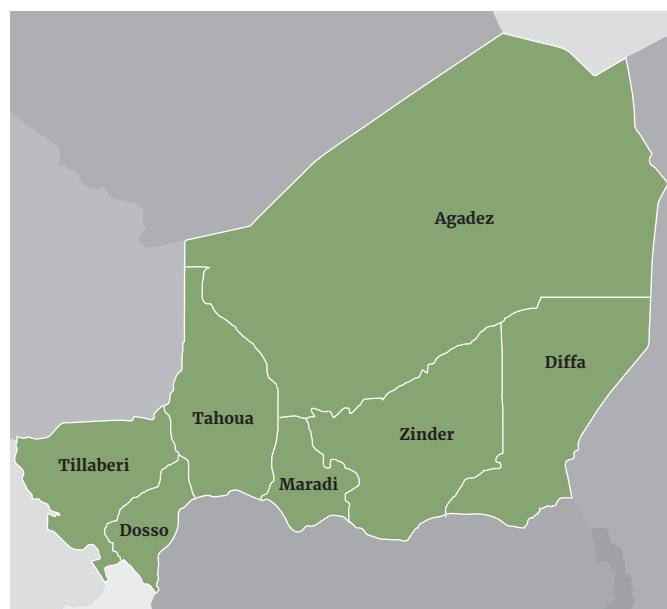
The most striking feature of the Niger linguistic situation is that no language is only spoken in this country. Indeed, many of these languages are widely spoken beyond the national borders. For instance, Hausa is spoken mainly in Niger, in northern Nigeria,

¹¹² Rapport final de l’atelier de validation de la stratégie nationale de généralisation de l’enseignement bilingue, STRAGEN/DGPLN, Niamey, 2013

¹¹³ Ibid.

in Cameroon, in Central African Republic, in Ghana, etc. The Songhay–Zarma is spoken in Niger, Benin, Burkina Faso, and Mali. The Fulfulde (Fulani) is spoken through much of West Africa, in Guinea, Mali, Niger, Senegal, Burkina Faso, Cameroon, Nigeria, etc.

Figure 4: Map of Niger



The table below does indicate the estimated level of progress of concomitant use of French and the national language throughout primary schooling, but this is only a projection based on the principle of the early introduction of the foreign language and the late withdrawal of the national language.

Figure 5: Languages of instruction

Primary school grades	National languages	French
First grade (CI)	95 %	5 %
Second grade (CP)	75 %	25 %
Third grade (CE1)	60 %	40 %
Fourth grade (CE2)	50 %	50 %
Fifth grade (CM1)	30 %	70 %
Sixth grade (CM2)	20 %	80 %

Source: Ministry of Education, MEN/A/PLN, Rapport Atelier STRAGEN, 2013

3. Current Print and Digital Reading Book Provision

The challenges of textbook and reading book provision in basic education in Niger can be summarized as follows: (i) the low level of accessibility both in financial terms (costs) and physically (the presence in schools); (ii) the relevance of content; (iii) the weak mastery of the production process (quality control); (iv) the lack of control of factors affecting distribution (security and effectiveness) and; (v) the relevance of various measures taken for their use, conservation, and good management.

The Curriculum reform based on the Approach through Situations (*Approche Par les Situations*) undertaken by the Ministry of Primary Education as part of the new education policy aims to improve the quality of the educational system by providing relevant curricula and teaching materials based on the country's socio-cultural realities. The reform strategy has set as a major objective for the provision of textbooks, teachers' guides, and other reading books—of good quality and in sufficient quantity—to preschoolers, primary school students, and literacy centers. The current remolding of the basic education curriculum is based on the use of bilingual education (French and national language) in lower primary grades. For the implementation of this curriculum reform, the tools of the experiment for the first grade of primary school (CI) in math and reading have been developed. The experimentation involves all regions of the country with the five national languages already equipped, including the Franco-Arabic schools (in total 500 schools presently).

The three main sources of reading books publishing are private publishers, NGOs, donors, and faith-based organizations (FBOs). However, all entities produce a very limited number of titles annually (3 to 5) and for little profit; many of these are bilingual (a local language and French) to help sales.

Despite the lack of financing and lack of school budgets to purchase textbooks and reading books outside MOE supplies, there is a general consensus

among stakeholders that demand for textbooks and reading books in national languages is quickly increasing in Niger due to the continued increase of new student enrollment in primary schools and new learners in the literacy centers.

Unlike most other French-speaking countries, Niger does not have a national library. The network of public libraries is itself relatively new, the first creations in the chief administrative divisions date from 1995. As they were being gradually established, the public libraries (there are 34 of them to date) have joined together in a network to promote exchanges. As for school libraries, currently there are only 93 libraries in high schools and teacher-training schools, 46 in secondary schools and primary schools, and they are badly equipped.¹¹⁴

An inventory of textbooks and reading books in national languages was initiated by the study with three publishers (some thirty books selected in catalogs as an example) for the purpose of introduction into the digital database.

For now, only one local publisher (Éditions Afrique-lecture) mentioned the production and sale of one storybook for children in ePub format. The retail price of such a book is estimated to be almost 10 times the price of the hardcopy. It was sold at 18,000 francs CFA (US\$30).

3.1 Publishing

The private publishing business appeared only in the mid-1980s in Niger. Between the late 1990s and today, several national publishing companies have emerged; the main ones are: Éditions Gashingo, Éditions Alpha, Éditions Afrique lecture, BUCO-éditions, Éditions Gama-Gari (GG), and Ets Daouda. They publish in French, English, Arabic, in the main national languages, and are organized in a national association of publishers which, however, is not operating very well. Private publishers, NGOS, and FBOs perform all book production in national languages.

In the area of textbooks and reading books production, local publishers are trying to cover the different levels of education (preschool, primary, and secondary schools), despite the limited access to financial resources and the predominance of government actions in the area.

At the creation of INDRAP (*Institut national de documentation, de recherche et d'animation pédagogique*)—the MOE textbooks publishing unit—significant funding and technical support was obtained from the government and many donors to support production fees (namely printing costs) and capacity building (textbooks development process). It also has to be noted that, several years after a small printing unit was provided to INDRAP as part of ensuring local book production capacity, concerns about general management were observed. These concerns caused donor reluctance to directly fund this state-based publishing structure.

Following the writing of the first textbooks by INDRAP, the publishers from the North positioned themselves to win the most important contracts through the International Competitive Bidding (ICB) process because they are most able to provide books of quality with good prices. The copyrights were generally property of the MOE, but sometimes there were problems (such as when reprinting) when they were held by publishers. Such situations show how copyright management can be a concern at the ministry level in the context of international textbooks provision.

Generally, each publishing house has a pool of writers (in French and in local languages) recruited from among civil servants, retired teachers, or freelancers. However, most of them need training in the design of educational materials (textbooks, reading books, and literacy materials). They are paid roughly 10 to 15% of the retail price of books by private publishers as copyright fees outlined in contracts signed between the author (writer and illustrator) and the publisher.

¹¹⁴ Aliou Sow, Rapport de l'étude sur l'existence et l'état des politiques nationales en matière de bibliothèque et de lecture publique en Afrique de l'Ouest, GTLME, ADEA, 2013

Private publishers have few trained staff and financial resources. In terms of equipment, they are minimally equipped with desktops, laptops, scanners, printers, etc., typically acquired at low prices. Most publishers make average print runs ranging between 500 and 3,000 copies per title, but this does not promote a good cost of production. Further, the technical specifications in use often require standards for choosing paper quality (inside and cover), type of binding (square back, sewn, glued), and number of colors (4) that raise the price of a book produced locally in Niger.

Many books are produced in four colors with hard covers, owing first to a concern for attractiveness and durability, but the cost/price of these books is almost twice those with soft covers, one or two colors, and glued not sewn (binding). Even though the study was not able to compare existing prices from real books, both publishers and printers recognized that the cost of books sewn and glued is higher than the cost of those only saddle-stitched.

Publishers pointed out that one of the major financial constraints they face is related to unsold stocks, which contribute to a lack of liquidity. The interviews revealed that the majority of publishers are generally not solicited by the ministries (Primary and Secondary education) which develop their own books through INDRAP and Curriculum Development and Educational Reform Unit (DCRE). This practice concerns both books in French and in national languages (textbooks, teachers' guides, various reading materials, glossaries, dictionaries, others).

Thus, an unbalanced competition has been established between the ministries and private publishers.

As part of the primary education new curriculum, and based on the Approach through Situations (APS) implementation processes, the DCRE is responsible for all textbook and teachers' guide implementation activities. These activities include content review, developing new textbooks in national languages, production, testing, implementation, and teacher training. In 2014, DCRE developed 11 textbooks and teachers' guides for the first grade (CI) in 5 languages of instruction: Hausa, Fulfulde, Kanuri, Songhai, and Zarma. The development process of second grade (CP) textbooks and teachers' guides is underway, and it is expected that 9 other books will be developed in the five national languages (reading and math books and the corresponding teachers' guides).

At the regulatory level, Niger is a signatory to the Florence agreement on the lifting of tax on the importation of educational, scientific, and cultural materials. The country also joined by Decree No. 88-387 of November 24, 1988, to the Universal Convention on copyright and intellectual property law. However, the implementation of the provisions of these agreements is lacking, resulting in a higher taxation of inputs in the production of books, which are all imported.¹¹⁵

To assess average formats and pricing, we examined 30 locally produced reading books in national languages, as seen in Figure 6. The majority of these reading books are bilingual (national language and French) and partially subsidized by international

Figure 6: Publishing formats

Publishers	Titles identified	Common format	Average retail price
Editions Alpha	12	14.5 x 21 cm	US\$2.47
Editions Gashingo	18	19 x 21 cm	US\$4.12

¹¹⁵ Mallam Garba Maman & Malam Abdou Bako, Étude sur l'état de l'édition en langues nationales au Niger, DGENF/ONG Monde des Enfants, Niamey, Octobre 2004

NGOs like EIRENE-Sahel or other development projects. This allowed the publishers to lower their production costs and sell the books at reduced prices.

It should be noted that publishers were reluctant to put the PDF version of their books in the database we were creating. Piracy is still a big issue for publishers in Niger and in the sub-region (they are worried about the possibility for data to be accessed illegally from our database), and it is also the first time that such a request has been made to them.

3.2 Printing

There is no national association of printers in Niger. Among the more than 30 printers based in the country, only eight of them are recognized as offering good printing services: *Imprimerie Albarka*, *Nouvelles Techniques d'Impression (NTI)*, *Nouvelle Imprimerie du Niger*, *Imprimerie Express*, *Imprimerie IMBA*, *Imprimerie Bon Beri (IBB)*, *Imprimerie Publi-Service*, and *Imprimerie du Plateau*. From the perspective of equipment and personnel, work conditions, quality, delivery time, and payment terms, the Niger printing sector has made considerable efforts in recent decades. Equipment in the major printing houses visited, for example, is relatively new and of sufficient capacity for local needs (including digital printing).

Due to its landlocked geography, Niger's printing industry suffers from high road transportation costs and taxation on imported production materials (around 21% for customs duties and 19% VAT). Additionally, banks charge high interest rates for loans (12–14%), and the sector suffers from liquidity constraints due to late payments (up to 6–12 months) from certain customers, including the government. This study has not obtained any specific data related to the issue of payment lag.

Printers complain about constraints such as unfair competition from international printers as well as the high cost of raw materials, equipment maintenance services, and energy supply. Despite these constraints, the national printing industry looks well placed to engage in quality production at a reasonable cost

(an average of US\$3.29 per book) if given access to significant print runs (e.g., minimum of 5,000 copies for reading books, and 10,000 to 20,000 for textbooks). These estimates assume realistic technical specifications and the possibility of lifting some tax.

Currently, most substantial government orders are awarded to foreign printers or to non-professional nationals who then subcontract abroad. This seems to be related to a lack of transparency in government procurement procedures.

3.3 Distribution

In Niamey, there are a number of bookstores, including *Burama*, *la Farandole des livres*, *la Maison du livre*, *Adax*, *Librairie chrétienne*, *Librairie de l'enseignement*. Booksellers are mostly established in the capital city, but there are also some medium-sized bookstores in regional capitals such as Maradi and Zinder. Booksellers mostly sell books in French (over 80%), compared to the main national languages Hausa, Zarma, Fulfulde, and Kanuri (around 10% of the stocks), and have little direct relationships with most national language publishers and the Ministry, since the latter distributes textbooks in schools without the involvement of local booksellers.

The classic book distribution chain does not exist in Niger as it does in Kenya. Books are placed at retailers, but without sufficient promotional effort, textbook publishers are often obliged to open small bookstores in schools, where possible, especially in the capital city of Niamey. These bookstores, mostly of small size, are usually open at the beginning of the school year based on an agreement between the school and the publisher, which generally includes a discount of 10% on all sales to the school. Publishers also make commercial consignments with booksellers, offering discounts ranging from 10 to 20% of the retail price. This rate varies depending on the market size and can reach 35% for some textbook distributors who have retail points in some other major cities. Further, it has been noted that some booksellers apply an average increase of about 40% of the retail price to cover their overhead

and profit. Then, the retail price need not increase with distance from the capital city.

In 2005 and 2009, the MOE requested proposals for two reprint contracts for a total of 2,342,780 textbooks (2005) and 2,118,036 textbooks and guides (2009). The contracted reprint was coupled to the distribution and the books had to be sent to 7,524 schools in 2005 and 9,490 schools in 2009. It was stated in the contract that payments would be made after all books were delivered and the beneficiary school officials acknowledged receipt of all materials. In this case, the responsibility for potential losses is the sole responsibility of the distributor. So, there was a very limited loss of books between the capital city and schools. According to the distributor, the average unit distribution cost was 120 CFA francs (US\$0.21) for the 2005 operation and 160 CFA francs (US\$0.28) in 2009. The team has not obtained the costs related to the distribution of 1,047,500 primary textbooks made in 2012–2013 and acquired by funding from France, costing €2.4 million (US\$2.6 million). This operation was done in cooperation with UNICEF and coupled with vaccine distribution to health centers. Regarding the costs of distribution done by the Ministry, there is no data available and little transparency in this area. However, it is stated in the UNICEF Reference Cost Estimate related to this operation, dated on September, 19th, 2012, that “it has been understood that further distribution from Niamey, that is all-country logistics, will be done by the Government, the cost of which is not included. Furthermore, all customs clearance activities will be carried out by the Government.”

There are few promotional opportunities on books in the country besides the Book Caravan (Caravane du livre) organized annually by the Ministry of Culture and the Niamey Book Fair which takes place every two years. To promote their new publications, some publishers exhibit posters in public places and occasionally broadcast television commercials. However, these promotional opportunities mainly deal with general books and reading materials (children books).

There is a national association formed by 6 local booksellers, but it is limited.

3.4 Procurement

Procurement arrangements for textbooks and reading books for the PAEQ (*projet d'appui à une éducation de qualité*) project are made on the basis of the World Bank's procedures for the purchase of textbooks (e.g., using Standard Bidding Documents for textbooks provision). For government funds, its own procurement guidelines are used. Many problems have been mentioned by publishers, printers, and booksellers in relation to their limited access to government contracts.

Many publishers and printers interviewed claimed that barriers to business include difficult procedures (ICBs), corrupt practices by some officials, bad management of bidding processes, lack of transparency, payment lag, favoritism, and nepotism (especially regarding government-funded operations). In addition, visits to schools revealed problems related to supply planning, long delivery delays, and lack of reliable and accessible statistics.

With regard to national acquisition procedures, Niger code of public procurement contracts recommends pooling public contracts for similar services in order to reduce costs and maximize efficiency through economies of scale. Although textbooks may be specific to country/regional curriculum, reading books in national languages for primary schools may provide opportunity for this. Specifically, there is opportunity for transnational languages like Hausa, Fulfulde, Kanuri, and Zarma (shared between Niger, Nigeria, Cameroon, Mali, and Burkina Faso).

3.5 Financing

Of the total public expenditure on education, 60% went to primary education and 25% to secondary in 2010. With ongoing educational reform, the Ministry entered an annual budget line for the acquisition of textbooks, including those in national languages. In 2014, the budget for these acquisitions

had been reserved exclusively for textbooks in national languages—140 million CFA francs (US\$0.23 million, see Appendix 1). In general, the Ministry buys textbooks for primary schools every two years on funding from the national budget. Books are distributed to students free of charge.

PAEQ will be implemented by the World Bank over the period 2014–2018 and is funded through a common basket of funds provided by Global Partnership for Education (GPE), French Development Agency (AFD), and the Swiss Agency for Development and Cooperation (SDC). Of a total amount of US\$104.2 million in funds in the common basket, US\$8 million is set aside for the provision of textbooks, teachers' guides, and other printed learning materials (namely glossaries and dictionaries) for supporting the experimentation of bilingual school curriculum. This subcomponent is specifically designed "to support a better quality of teaching and learning through the provision of reading materials for primary schools and the first cycle of secondary school." The program will provide textbooks and teachers' guides in core subjects (math, reading, science).¹¹⁶

The retail price of textbooks is high in the market, generally ranging between 1,750 CFA francs (US\$3.07) and 3,500 CFA francs (US\$6.14) with an average retail price generally estimated at 2,000 CFA (US\$3.50), not including distribution.

Several NGOs are printing only in black and white to reduce costs. For example, the Niger Education and Community Strengthening (NECS) project, funded by USAID and the Millennium Challenge Corporation (MCC) in an amount totaling US\$7.6 million for four years, has produced more than 30,000 reading books for the first and second grades of 150 primary schools in four Nigerien local languages (Hausa, Zarma, Fulfulde, and Kanuri) in only 1 color. The total amount spent by the project to produce these reading materials is about US\$3 million over three years.

On its part, the AFD has shown willingness to fund books provision projects submitted by the MOE granted that they are practicable and accompanied by co-funding from the "common basket" of funds provided by Niger's education system and development partners.

3.6 *Demand channels and use*

The availability and accessibility of textbooks and reading books in Niger's schools are in three forms:

1. Used freely by all students and teachers in the classroom, but without students taking them home
2. Kept in a classroom cupboard and brought out for instruction, 1 book for 2 or 3 students
3. Kept by the teacher or the school principal and lessons are copied on the blackboard every day

There is no available data on the use of textbooks and reading books, but there are strong assumptions that teachers do not sufficiently use these tools. Evaluations on the current availability and affordability are not made after the books distribution cycle. Visits to two bilingual primary schools showed many unused textbooks stored in the schools' principal's office, and the ones in use were mostly photocopies. One major finding was that reading mastery is still a great concern in all primary school grades, and this relates to the serious lack of reading books available both in schools and in the home.

Losses of books during the school year were highlighted but often without any precise identification of the causes. A book black market cannot be ruled out, since there are many cases of theft and misappropriation during distribution, especially between the Inspectorates and schools when government is involved. Within schools, effective policy by management committees (CGDES) guarantee security, but there is increased risk of

¹¹⁶ Document d'évaluation du projet d'appui à une éducation de qualité (PAEQ1), Banque mondiale, Washington, 2014

loss during summer holidays, including thefts in the warehouses, bad weather (rainfall and humidity), and predators (mice, termites, cockroaches.). Replacements for missing or defective books are not made on a regular basis, due to the fact that the Ministry does not make distributions on a yearly basis. Schools do not have security stocks to replace the missing books, nor a budget to buy books on the market. In the absence of recent studies on books availability nationwide, the study was not able to get data on the textbook/student ratio. It is estimated to be 1 textbook for 3 students, keeping also in mind that the basic target of the number of titles per student per year is 3 (math, science, and reading). Reading books are absent from classrooms.

3.7 Digital

Although evolving in a difficult technological environment, Niger's educational system is trying some experiments to introduce Information and Communications Technology (ICT) in schools. As examples, three experiments conducted in partnership with the Orange Foundation (a French mobile phone and internet services provider in Niger) and by the MOE were:

1. At the primary education level, the Ministry signed a Memorandum of Understanding with the Orange Foundation which provided 4,500 tablets in 30 primary schools. The contents of four textbooks whose copyrights are held by the Ministry were digitized and fed into tablets for fourth grade primary school (CE2) students during the 2014–2015 school year. The experiment continued during the school year 2015–2016 with the supply of 1,530 tablets to fifth grade (CM1) students who had already participated in the experiment in fourth grade the previous year.¹¹⁷
2. The Ministry is acquiring 4,500 new tablets with its own funds but plans to provide a total of 12,000. These tablets will be distributed in four other schools already targeted for experiment.

This will bring the total number of experimental tablet schools to 34. The prospect planned by the Ministry is to transform the Android support of PDF content in order to mitigate the high risk of hacking of textbooks.

3. At the secondary education level: an evaluation report produced in 2015 presents the results of an experiment of digital tablets in Niger secondary schools. This project ran from March 2013 to June 2014 with funding from the Orange Foundation, Orange Labs, and the AFD. This pilot experiment concerned nearly 150 students and 20 teachers in two secondary schools, one located in Niamey and the other in Soudouré (a peri-urban area). The main objective was to address the weakness of educational resources, primarily textbooks. Each US\$120 tablet was loaded with a number of digital resources. These resources included French and English dictionaries, digitized books, past examination papers of the BEPC (secondary school certificate), and other educational applications.

Another initiative is introducing information technology (IT) classrooms and smart schools (*Classes intelligentes*) in rural areas in order to reduce the achievement gap between urban and rural students. The smart school will enable students to work directly on computers, on an electronic board, and through Galaxy tablet computers. This project is planned as a comprehensive program of courses on Microsoft technologies, allowing Niger rural secondary school students to acquire basic skills in ICT. The start of implementation activities is scheduled for 2016–2017 with funding from the national budget. The targeted schools will be supplied with solar energy.

According to the primary education ministry, there is currently no plan for the digitization of textbooks and other reading materials in national languages for purposes of incorporating digital resources.

¹¹⁷ Rapport d'évaluation bilan et perspectives de l'expérimentation « Tablettes » au Niger, MEP/A, 2015

4. Country Findings and Market Gaps

4.1 Production costs

Based on discussions with both public and private stakeholders, and the analysis of various books produced locally, it appears that the high price of books produced locally is largely dependent on two main factors: the nature of the technical specifications and the high cost of raw materials. According to printers and publishers, around 2/3 of usual production prices for a given book can be saved if the right specifications are used (format, type of paper, colors, binding). Typical specifications in use locally are: format (A4 for textbooks and A5 for reading books), paper (80 gr offset), colors (four colors), binding (sewn and glued).

It is important to note that many teachers agreed that colors have no direct impact on learning outcomes apart from helping young children better distinguish drawn objects, for example. Moreover, visits to 2 different bilingual schools showed that students are using exclusively black and white books in local languages, even just photocopies for some subjects. Thus, by focusing on the most easily manageable aspect, technical specifications, the following points can be underlined:

- ▶ **Format:** choosing among the most popular formats of equipment available locally and in the sub-region (Nigeria, Ghana, Benin, etc.), the A5 format appears suitable for reading books while 19 x 25 cm textbooks are preferable.
- ▶ **Choice of paper:** cheap, recycled paper on the market or a lighter basis weight of about 65–70 grams for the inside against the 80 grams offset is generally used, and for soft cover paper, 300 grams Chromolux for instance, in place of hard cover or coated paper, which is more expensive. Lamination or varnishing options should be envisioned case by case.

For the same primary reading book, the price differential estimated to go from soft cover to hard cover generates an increase of almost half of the initial price. Moreover, the average book life span varies from 2 to 3 years among private publishers, but is generally 3 years for government publications.

Comparison of the different components of reading book production costs to retail price shows that they vary from one publisher to another, as seen in Figure 7. In addition, two local printers were interviewed to compare primary reading book manufacturing costs, and the results are summarized in Figure 8.

Figure 7: Components of reading book costs

Publisher	Authorship	Page design and layout	Manufacturing	Publisher overhead	Bookseller discount
Gama-Gari	15%	10%	45%	30%	direct sales
Gashingo	15%	10%	50%	15%	10%
Alpha	15%	10%	40%	25%	10%
Afrique-lecture	12%	13%	35%	20%	20%

Figure 8: Contribution of various production stages to total production costs

Printer	Pre-press	Manufacturing	Printer overhead	Profits
NTI	30%	30%	25%	15%
Albarka	20%	25%	15%	40%

4.2 Specifications Influencing Production Costs

- ▶ **Colors:** 2 colors inside with frames and 2 colors on the cover, except in the first grade of primary school (CI) in 4 colors of cover when necessary. For reading books, it could be better to consider either black and white publications inside or at most in 2 colors with frames. Manufacturing represents 35–50% of the cost of a textbook produced in 4 colors, according to the data provided by local publishers.
- ▶ **Type of binding:** In most cases, one would opt for the saddle stitch for textbooks or reading books whose length does not generally exceed 98 to 120 pages. But for thick books, they can be perfect-bound, not sewn, which holds just as well and costs less. Those books are generally sewn in Niger.
- ▶ **Print run:** It is not easy to get a good unit price with short print runs, as is the current situation in the country. Only long print runs can produce significant economies of scale and lower prices for textbook production.

Typical specifications frequently in use are as follows: format (A4 for textbooks and A5 for reading books), paper (80 gram offset), colors (4 colors), binding (sewn and glued), print runs (500 – 3000 on average).

Niger has many well-trained writers of textbooks and reading books due to several programs supporting capacity building and enabling writers and illustrators to produce good content in French and in national languages.

Government procurement contracts and the pooling of needs in tenders should be transparent, with the use of recognized professionals in the field, and in accordance with official guidelines or those issued by donors when they are involved in funding.

4.3 Distribution delays

Significant delays have been encountered with textbook distribution by government bodies. For example, hundreds of books in national languages provided by SDC have been stocked in the regional

Inspectorates for more than one year, and cases like this do not seem isolated. Effort needs to be undertaken to avoid this, including involving local professional stakeholders in the distribution process. However, in general, schools have adequate storage facilities including metal canteens, stationary supply and book cupboards, shelves, etc.

In addition to long delivery delays, visits to schools revealed problems related to supply planning, lack of teacher training in book use, unavailability of books to students, lack of reliable and up-to-date data on book availability, etc. For the latter, it is necessary to set up a reliable computerized system of textbooks and reading books monitoring nationwide.

4.4 Effective use of textbooks and reading books in classrooms

Availability itself is not the final goal of textbooks and reading book provision. The effective use by teachers and students in classrooms and outside is the most important objective to target, and this is not apparently effective in Niger primary schools. More efforts are needed to achieve this objective.

Further, the quest for quality in education has to begin from foundational skills, and one of these is reading. This ability is essential to ensuring that learners can master the three “R’s:” Reading, Writing, and Arithmetic—as much as possible in their mother tongue.

4.5 Financing

The use of 10 national languages as languages of instruction (LOIs) has important financial implications that need to be addressed. Government is willing to procure textbooks and reading books on a regular basis to fill in the recurrent gaps. Recent information demonstrated its commitment (see Appendix 1), but many problems have been mentioned by the stakeholders regarding the official procurement system: bad governance and corrupt practices, lack of transparency, payment lag, favoritism, nepotism, etc.

4.6 Policy dialogue

Given that Niger has over 40 years of experience producing textbooks and reading books in national languages, the country now needs to focus on policies in broadening education access, book publishing, and reading promotion in these languages in order to build a good and solid system of books provision and increased literacy. This supposes that a continued process of policy dialogue is maintained with all social actors, technical and financial partners, and professional stakeholders in the book chain. In fact, the majority of parents, especially in urban areas where most of the schools are located, are not ready to have their children taught in the local languages. This is a great obstacle to the implementation of major book projects in national languages.

Expanding the use of local languages in education would increase the demand for textbooks and reading books in national languages. It would also lead to the production of large quantities of books with significant costs savings through economies of scale.

5. Discussion and Opportunities for a Global Book Fund

Five main recommendations can be made regarding the feasibility of the Global Book Fund in Niger:

5.1 Initiating or strengthening the policy dialogue

- ▶ It is necessary to establish a continued advocacy mechanism at the level of parents and the general public in order to support bilingual schools and literacy programs. For this purpose, the design of a *support communication plan* would be of great benefit. This plan could also include a component on the *policy of promoting books and reading in national and local languages*.
- ▶ Support the development of a *coherent policy of increasing the use of national languages* in teaching. This policy would support the extension of literacy to disadvantaged and vulnerable groups

and the establishment of a sustainable literate environment.

- ▶ Niger needs a *national textbook policy* specifying strategies to meet the challenges of an emerging national book industry, addressing key factors such as lifting tax on books and inputs, securing distribution, strengthening use of books in the classroom and outside through better community engagement and teacher training, and increasing value for money through improved books conservation and good management at the school level.

It is important to recall that a key factor in increasing demand and availability raised by most of the stakeholders is teaching in local languages nationwide. Moreover, a “sustainable literate environment” cannot be obtained without the availability and affordability of reading books for the maximum number of citizens, in all official languages in the country, in all potential reading places: classrooms, libraries, families, social organizations, etc.

5.2 Investing in capacity building

- ▶ It is generally recognized that urgent and significant training of public, private, and civil society actors, especially authors/developers, illustrators, publishers (graphic designers), and translators specialized in the national languages of learning are necessary to build capacity.
- ▶ Provide technical assistance (TA) and institutional support to professional organizations in order to expedite the development of publishing in national languages and support public reading in these languages. These organizations include:
 1. National association of Niger writers in national languages (ASAUNIL)
 2. National association of publishers
 3. National association of booksellers
 4. National association of journalists in national languages
- ▶ Choice of reading book titles: the supply of textbooks and reading books for the primary

level is dominated by the ministry, giving them a monopoly on title selection and distribution. Private publishers would like an open process, allowing them to offer other content that could potentially compete as part of a free selection of titles to use in schools (with a wider selection). Development of the private publishing sector will be compromised as long as it has no access to the growing market for textbooks and other reading materials for schools.

5.3 Supporting the production of textbooks and other reading materials

- ▶ The implementation of a publishing assistance fund for textbooks, reading books, and digital resources. This type of fund would mitigate the permanent cash constraints to the publishing sector, promote diversification, and increase productivity. Current cash constraints include lack of direct funding to publishers and printers, poor access to bank credit, and the high interest rates on loans. The idea of having a publishing assistance fund in place is primarily associated with the objective to help local publishers and allow them to produce more books at an affordable price.
- ▶ A publishing assistance fund could also effectively support the production and establishment of digital resources both in French and in national languages. The ministries in charge of primary and secondary education are already committed to introducing ICT in schools through pilot projects mentioned above. The use of solar energy in schools will gradually remove the obstacle of access to energy. In addition, private publishers, with their limited financial and technical resources, are already planning to engage in electronic publishing in order to both provide adapted contents to tablets provided by the ministries and meet the growing demand in electronic educational tools, especially in Niamey. However, this is certainly a long-term goal because it is not yet supported by the required financial resources or technical capabilities.

5.4 Strengthening local and regional partnerships

The difficulties in diversification and expansion of production and markets for more sustained cost control will require strengthening initiatives aimed at *regional joint publications and co-productions* between publishers working in the transnational languages. For example, past experiments have focused on the production of around 100,000 copies in Hausa, 25,000 in Kanuri, and 50,000 in Fulfulde between the partners of Niger and Nigeria. This kind of productive collaboration on books can be strengthened to ensure economies of scale in printing and to significantly reduce production costs.

Further, the promotion of co-publishing at the regional and international level to target larger markets could promote harmonization among publishers. It could also promote the exchange of experiences among writers and publishers using the same language in different countries as well as practical adaptation to technological innovations and new market requirements (digital). Hausa alone, which has more than 34 million speakers, is utilized in at least eight countries (Burkina Faso, Cameroon, Chad, Ghana, Libya, Niger, Nigeria, Sudan).

5.5 Monitoring the availability and accessibility of reading books

- ▶ Assist in the establishment of a computerized and integrated system to track the availability of textbooks and reading books at the central level, school libraries, and non-formal education centers for monitoring and evaluation of the process.

Particular attention should be given to the mechanisms for monitoring and managing textbooks at the school level, taking into account the country specificities to avoid issues encountered elsewhere: theft, poor conservation, lack of tracking systems, illicit sales on the black market, etc. Thus, standardized formats of various monitoring tools could be developed and disseminated countrywide with regular monitoring from inspectors. Monitoring

tools could also track the availability and utilization of textbooks and reading books by teachers and students, the reinforcement of school management committees (CGDES) and/or parents associations, and effectiveness in overall school management process.

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7. Appendix

7.1 Appendix 1: Cost of books procured by MOE (2012–2015)

ITEMS	QTY	COST (Francs CFA)	TOTAL AMOUNT	FUNDING
2012				
Preschool reading books	300,000	342,900,000	300,000,000	AFD
Grammar – textbooks (CE & CM)	228,782	240,967,560	250,000,000	PAEB (donors)
Grammar – teachers' guides (CE & CM)	183,477			
Sub-total 2012		583,867,560	550,000,000	
2013				
Textbooks in Arabic for bilingual schools (Medersa)	30,000	67,875,000	90,000,000	National Budget (NB)
Maths textbooks and guides (from CI to CM2)	1,434,000	1,498,771,223	1,574,296,800	AFD
Reading books and guides (from CI to CM2)	738,000			
Science textbooks and guides (from CI to CM2)	970,500			
Maths textbooks (4è and 3è)	152,786	290,000,000	291,030,000	NB
Sub-total 2013		1,856,646,223	1,955,326,800	
2014				
Grammar – textbook CE	486,486	561,636,843	593,894,000	NB
Grammar – textbook CM	486,486			
Grammar – teacher guide CE	9,111			
Grammar – teacher guide CM	9,111			
Reading textbook in national languages (trial books)	25,000	64,855,000	150,000,000	NB
Maths textbook in national languages (trial books)	25,000	73,185,000		NB
Literacy brochures	56,420	176,039,630	234,625,000	NB
Sub-total 2014		875,716,473	978,519,000	
TOTAL COST (Francs CFA)		3,026,230,256	3,483,845,800	
2015: a provision of 884 million CFA was made in the national budget, but, due to lack of funding, this activity had been cancelled (no textbooks provided in 2015).				

Source: Procurement Unit, Ministry of Primary Education, MEP/A/PLN, 2015

7.2 Appendix 2: Interview List

A– Ministry of Primary Education—Ministère de L’Enseignement primaire, de l’Alphabétisation, de la Promotion des Langues Nationales et de l’Éducation Civique (MEP/A/PLN/EC)	
Yacouba Souley	Direction des Marchés publics et des Délégations de Service public
Mallam Garba Maman	de la Promotion des langues nationales et de l’Éducation civique
Elghamis Ramada	Institut National de Documentation, Recherche et d’Animation Pédagogiques (INDRAP)
Dandi Adamou	Direction de l’Alphabétisation et de l’Éducation non formelle (DGAENF)
Roua Boukar	Direction du Curriculum et de la Réforme de l’Enseignement (DCRE)
Souley Rabi	Service de l’éducation préscolaire
Sabiou Arzika	Service de la promotion de l’informatique
Nourou Abdourahmane	Systèmes alternatifs d’alphabétisation, responsable caractères coraniques harmonisés (AJAMI)
Namata Rokayatou	ÉLAN de Madina 3
B– Ministry of Culture—Ministère de la Culture, des Arts et Loisirs	
Maï Moustapha	Ministère de la Culture
Oumarou Amadou	Ministère de la Culture
Abdoua Ouma	Association des auteurs nigériens en langues nationales (ASAUNIL)
C– Ministry of Secondary Education—Ministère des Enseignements Secondaires	
Mahamadou Habibou	Ministère des Enseignements Secondaires
D– Publishers	
Malam Abdou Bako	Éditions Gashingo
Issoufi Alzouma Oumarou	Éditions Alpha
Chérif Lawan	Éditions Afrique–Lecture
Abdou Mijinguini	Éditions Gama–Gari (GG)
E– Printers	
Nabazaga Tawaye	Imprimerie N.T.I Sarl
Tahirou Mazou	Imprimerie Albarka
F– Distributors	
Binta Tini	Librairie La Farandole des livres
Georges Bebert	Librairie Burama
Hawa Sankarani	L’Association des libraires du Niger
G– Implementers	
Ali Amadou	Niger Education & Community Strengthening (NECS) Project
Abdoulaye Ali	VIE Kande Ni Bayra
H– Donors	
Sharmila Pillai	UNICEF Niger
Adama Ouédraogo	World Bank – Niger
Cynthia Mela	Agence Française de Développement (AFD)

Global Book Fund Country Study

NIGERIA

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1. Methodology

The Nigeria country study was conducted by International Education Partners (IEP) with the support of Kunle Adebajji, an in-country researcher, over the course of October 2015–January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

This research study is based on interviews conducted by IEP's in-country researcher with representatives of the main stakeholder categories in the book chain, both public and private sector, including urban and rural, state and private primary schools, book project implementers/non-governmental organizations (NGOs), publishers, printers, booksellers, donors/multilaterals, and government ministries. The study covered many regions of Nigeria including Abuja, Ibadan, Lagos, Zaria, and Kano. The interviews were supplemented by research, reports, and official statistics. The main references are provided in Section 6 and a list of interviews in Appendix 1.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background and Education System

According to the CIA World Factbook, Nigeria, Africa's most populous country, has a geographical area of 923,768km² with a 2015 estimated population of 181,562,056. Population density is 195/km² and the annual population growth rate is 2.7%. 47% of the population live in towns and cities, with 53% living in rural areas. The annual per capita income for Nigeria is US\$1,440, and it has an HDI world ranking of 152

(low income). Adult literacy in Nigeria¹¹⁸ is 59.6% (male literacy is 69.2% and female literacy is 49.7%, demonstrating a significant gender gap).

Nigeria is split into administrative divisions as seen in Figure 1.

Figure 1. Map of Nigeria



Nigerian education is the shared responsibility of the federal Ministry of Education and state and local government education authorities. The federal MOE is responsible for policy and quality control. The state authorities are responsible for implementing federal policy for all state-controlled public education and state schools at the level of individual states. The education system is divided into kindergarten, primary, secondary, and tertiary education sectors. States are responsible for the provision and management of secondary schools. Local Government Education Authorities (LGEAs) are largely responsible for pre-school and primary education. There has been no Education Management Information System (EMIS) data published by the

¹¹⁸ Defined by the CIA World Factbook as age 15 and over who can read and write in a recognized language.

Universal Basic Education Commission (UBEC) and the federal MOE since 2003, so primary enrollment data by grade levels is not available on a national basis. In 2010, the total national primary school population was estimated at 20.68 million. The gross enrollment ratio at the primary level in 2010 was also estimated at 85.3% according to UIS.¹¹⁹ The net enrollment rate (as a percentage of children in the 6–12 age group) was a much lower at 61% (male children 64%, female children 58%) in 2007.¹²⁰

No data is available on enrollment by language of instruction, spoken languages, or on the number of Hausa, Yoruba, or Igbo speakers enrolled in primary schools. School age children in urban areas were more likely than those in rural areas to attend primary school (74% versus 55%). In addition, notable regional differences exist in the percentage of school age children attending primary school. In the northwest, 42% of children attend primary school, compared with 83% in the southwest and 82% in the southeast. In 2008, the national primary to secondary transition rate was 44%, according to the Nigeria Demographic and Health Survey (DHS) Education Data Profile.¹²¹ Universal Basic Education (UBE) was introduced as a successor to the previous Universal Primary Education (UPE) policy. UBE requires 6 years of Primary School education followed by 3 years of Junior Secondary School education, providing 9 years of compulsory basic schooling for every child. Promotion from one class to another is automatic but theoretically determined through continuous assessment. UBE is monitored by the Universal Basic Education Commission (UBEC). Basic education is compulsory for 9 years, free, and considered the right of every child, including special groups such as nomads and migrants, girl children and women, *Almajiri*, street children and disabled children.

Free universal primary education (FUPE) was introduced in 1976, and at launch, primary school

students in Class 1 reached about 3 million, but a shortage of properly trained teachers hampered the objectives of the scheme. The government, which had spent about US\$1 billion on primary schools and teacher education, achieved success with school enrollment but enrollment far outpaced the availability of trained teachers. The plan later suffered in the 1980s from inadequate financing from the federal government when oil prices fell. Inadequate enthusiasm from the major beneficiaries and the Nigerian government's policy instability also contributed to the lack of a full realization of the project's objectives.¹²² At the same time, the overall quality of education was rated as poor at all levels and varied considerably within and across states with substantial rural/urban, gender, and regional differentials in performance. The Federal Ministry of Education (FME), along with all other major stakeholders, recognized that “the education sector in Nigeria is in a state of crisis” and that “nothing less than major renewal of all systems and institutions is required.”

UBEC was established in order to meet goal 1 of the Education for All (EFA) targets which required the expansion of education and goal 2 of the Millennium Development Goals (MDGs) which specified universal primary education. Within these broad targets, literacy and numeracy are federal priorities. The current UBEC focus is on the achievement of Sustainable Development Goals (SDGs). The major constraint in achieving effective learning outcomes in Nigeria has been the poor literacy performance. UBEC is now looking for partners to ensure that the level of early literacy is improved. Some Junior Secondary School (JSS) students are reported to be unable to write in any language after 6 years of primary education. In response, UBEC plans to support the introduction of *Jolly Phonics* (a US-published reading scheme) in 15 states. UBEC pays for the 4 core primary

¹¹⁹ UNESCO. (2014). Regional and Country Profiles. Retrieved 2016, from <http://stats.uis.unesco.org/unesco/TableViewer/document.aspx?ReportId=121>

¹²⁰ Ibid.

¹²¹ National Population Commission and ICF International. (2014). Nigeria Demographic and Health Survey, Retrieved 2016 from <https://dhsprogram.com/pubs/pdf/FR293/FR293.pdf>

¹²² Fafunwa, B. (1991). History of Education in Nigeria 2nd Edition. Lagos: Nigeria Publishing Services.

subject textbooks (English, math, science, and social studies) from the lists provided by the states. Other subject textbooks regarded as non-core have to be purchased by parents. UBEC does not pay for or procure any primary level reading materials in any language. All UBEC expenditure is funded by the federal government.

The *Almajiri* (itinerant Quranic School Pupils) constitute the largest group of out-of-school children in Nigeria. Numbering over 9 Million (source: 2010 Ministerial Committee on Madrasahs), this segment of the Nigerian population poses challenges to the attainment of EFA and the MDGs. In order to reduce inequality and provide access, the federal government set up a committee on the implementation of an *Almajiri* Education Program and charged it with the responsibility for ensuring integration into the UBE Program. This is without prejudice to their acquiring a sound mastery of Quranic knowledge. UBEC also is currently involved in two other large donor-funded education pilot projects:

- ▶ The World Bank funded *State Education Program Investment Project* (SEPIP) implementing in 3 states—Anambra, Ekiti, and Bauchi—key components of which are: the improvement in school management through School-Based Management Committees (SBMCs), the deployment of teachers, and the assessment of learning achievements.
- ▶ GPE (Global Partnership for Education 2015–2018) focusing on 5 northern states—Sokoto, Katsina, Kaduna, Kano, and Jigawa—to support state education plans for teacher training and the supply of educational materials.

2.2 Country Language Profile

English is Nigeria's official language and is perceived by the government as a unifying factor in a country with major ethnic, linguistic, and religious differences. English is also the dominant LOI in the education system from pre-school through primary into secondary and tertiary levels. There are over 500

mother tongue languages spoken in Nigeria, but three of these (Hausa, Yoruba, and Igbo, each with more than 18 million speakers) are considered major mother tongue languages. All others are classified as minority languages, including Fula, Ibibio, Edo, and Kanuri.

Hausa is widely spoken across Sahelian West Africa. It is estimated that L1 and L2 speakers total over 50 million and that with non-native speakers using it as an oral trade language it could exceed 70 million. Nigeria and Niger have large populations of L1 speakers, but there are also L1 speakers in Ghana, Benin, Togo, Cameroon, Cote d'Ivoire, and Sudan. The widespread readability of Hausa throughout West Africa is inhibited by the number of different spoken dialects, great variations in the effective teaching of reading and writing in Hausa in different countries, and the use of Hausa in both Latin and Arabic scripts.

Igbo is the principal native language of the Igbo people, an ethnic group of southeastern Nigeria. There are approximately 24 million Igbo speakers who live mostly in Nigeria and are primarily of Igbo descent. Igbo is written in the Latin script. There are more than 20 Igbo dialects, which has inhibited its readability in the past. There is apparently a degree of dialect levelling taking place. A standard Igbo literary language was developed in 1972, based on the Owerri and Umuahia dialects. There are also related Igbo languages that are sometimes considered to be dialects of Igbo. Further, Igbo is a recognized minority language in Equatorial Guinea. The Yoruba are an ethnic group of southwestern and north-central Nigeria as well as southern and central Benin in West Africa. The Yoruba constitute over 40 million people in total, the majority of whom are resident in Nigeria and make up 21% of its population, according to the CIA World Factbook, making them one of the largest ethnic groups in Africa.¹²³ The majority of the Yoruba speak the Yorubax language which is tonal and is in the Niger-Congo language family. Fula (also known as Fulani, Fulfude, and Peul in Francophone countries) is also widely spoken in Sahelian countries, with an estimated 25 million speakers. It is an official language

¹²³ CIA World Factbook. (2016). Nigeria. Retrieved from <https://www.cia.gov/library/publications/the-world-factbook/geos/ni.html>

in Nigeria and Senegal, an official regional language in Guinea, and a national language in Mali and Niger where it is spoken by more than 8% of the population. It is considered to be widely understood as a spoken language in all Sahelian countries, but doubts have been raised about its widespread readability because of dialect and vocabulary differences and variations from country to country in the effective teaching of reading and writing in the language.

2.3 *Language of Instruction (LOI) Policy*

Nigeria's National Education Policy (NEP) stipulates that the language of instruction (LOI) in lower primary should be in the language of the immediate environment of the school. However, this policy is not actively enforced by the Ministry of Education (MOE) and is widely ignored by many states and individual schools who prefer to use English as the LOI from primary and even in pre-schools.

Learning a Nigerian mother tongue language is specified as compulsory in primary and secondary schools, but even in those schools where elective languages were offered, only the three main local languages of Hausa, Igbo, and Yoruba were available as electives. Hausa is the most widely used local language as an LOI in Nigeria, but the lack of any reliable enrollment data from UBEC and the MOE means that it is difficult to be certain of the extent of Hausa or any other local language learning in Nigeria's primary schools.

3. Current Print and Digital Reading Book Provision

Although UBEC aims to provide every primary school student with exclusive access to the state prescribed textbooks for each of the four core subjects, the ratio of students to core textbooks in 2008 was higher than 2.3:1 in primary schools in nine surveyed states, and the ratio of students to core textbooks increased as the student moved through the grades. Monitoring reports found that only 20–50% of students in Enugu had the specified textbook, depending on the subject, and no more than one in seven had a textbook for any

subject in Kaduna. About one in 10 Enugu teachers and two in 10 Kaduna teachers did not have the textbook for a given subject. About 45% percent of Enugu teachers and 75% of Kaduna teachers did not have the teachers' guide for a given subject. Although almost all teachers in both states had a writing implement, paper, and chalk; only half of Kaduna teachers and 15% of Enugu teachers had a blackboard (or one in reasonable condition). Only 1 in 8 Enugu government primary schools and 1 in 30 Kaduna government primary schools had a school library.

Because UBEC does not fund the provision of primary reading books to schools in any language, the availability of reading books in schools depends largely on state and LGEA policies towards funding reading book provision. The state and local allocations vary significantly from state to state, with most northern states less likely to provide funding for this purpose than states in the southeast and southwest.

School operational budgets and school purchases are not considered to be a significant factor in the availability of reading books in primary schools except for private primary schools. However, differences in the effectiveness of state/LGEA-run distribution to schools are factors in availability, particularly between urban and rural areas. Poor school teaching and learning material (TLM) management is also a major contributing factor in high levels of TLM loss and damage.

While there is insufficient published data to provide a comprehensive national overview of reading book availability in Nigerian state-run primary schools, it is likely that primary schools in most states have few primary reading books. Reading books they do have are likely to be in English rather than in Hausa, Yoruba, or Igbo, although Hausa is likely to be the second most available language. The UNICEF-funded Reading and Numeracy Activity (RANA) project has found already that Hausa language competence among teachers is worse than expected and is a constraint on the rapid development of Hausa language literacy. It is also probably true that most primary teachers need more training and guidance in the effective use of

reading books in class to support literacy and improve student performance in all subjects.

There is no evidence or published data for any significant level of digital reading materials in government primary schools in Nigeria.

4. Country Findings and Market Gaps

4.1 *Authorship and Publishing Capacity*

The beginning of the Nigerian publishing industry dates from the late 1940s when Nigeria was still a British colony. In-country sales representation was established by British educational publishers, initially selling school textbooks written for the UK domestic market. By the end of the 1950s, the representative offices were being replaced by the establishment of local branches or subsidiaries of UK publishing houses staffed by Nigerians under UK management staff. These local companies started by producing adaptations of British school textbooks for distribution in Nigeria. Soon after, textbooks were being published that were specifically written for the Nigerian or the English-speaking West African curricula and markets. In the 1970s, Nigerian indigenization policies required British publishers to divest themselves of their majority shareholdings in what were by that time well-established local companies. The companies that they left behind had well-trained local staff capable of running all aspects of a large publishing house from financial management through publishing, editorial, design, production, sales and marketing, and distribution.

Today, these companies and others are almost all exclusively Nigerian-owned, and the biggest among them are public liability companies quoted on the Lagos Stock Exchange. In 2014, the indigenization policies for publishing companies were revoked by the Nigerian government, and Pearson has already re-invested in Nigeria by setting up its own publishing company once again.

In 2016, the publishing of school textbooks is still the key focus of most Nigerian publishing companies. In addition to textbooks, many of these companies also

publish tertiary level college textbooks, reference books, books for children, fiction, and general interest books. The school textbook market is dominated by six key players, the biggest of which having annual sales turnovers in excess of US\$10 million at the rate of exchange prevailing in December 2015. Most publishing is in the English language, while much of what is published in local languages is for primary school children in the private school market and is mostly in Hausa which is widely spoken in Northern Nigeria or to a lesser extent in Yoruba or Igbo. There is relatively little local language publishing outside these three dominant local languages. The Nigerian publishing industry is widely regarded for its professionalism and is certainly more than capable of handling the development and publication of quality reading books in English or the main local languages.

Authorship capacity in English is excellent at all levels of the education sector from pre-schools through to tertiary level textbooks. There is proven authorship capacity in Hausa, Yoruba, and Igbo, particularly at the primary level where demand is strongest and most concentrated. Authorship capacity in other local languages is less certain to be readily available.

4.2 *Printing*

In the past 15 years, there has been a significant upgrading and improvement in Nigerian book manufacturing capacity via investment in pre-press technology and printing, binding, and finishing plant. Ibadan, Lagos, and to a lesser extent Enugu in the southeast are the main book manufacturing centers, but Abuja and Kano also have some capacity. Nigeria now has the capacity to support local textbook and supplementary materials requirements, and book manufacturing quality has also improved. However, the main publishers report that they can still achieve better prices by an average of around 15% by printing in international print centers in India, China, and Malaysia, and that printing internationally is still more reliable in terms of meeting delivery schedules. Nigerian publishers estimate that around 70% of their educational print requirement for textbooks, reading

books, and supplementary materials are placed with international print centers. With a primary school population estimated at more than 20 million children, there can be very large print runs which the local printing industry is not as well equipped to handle. Chinese and Indian printers also offer lower prices and a higher production quality than is widely obtainable from local printers.

4.3 Procurement

It is difficult to present a coherent picture of primary level TLM procurement in Nigeria. Each state and LGEA has responsibility for procurement in its own areas of responsibility. Many states/LGEAs have little knowledge of transparent procurement systems or of TLM evaluation criteria. The methodology of establishing the basic textbook lists for the 4 core subject textbooks funded by UBEC also varies from state to state. The state level selection and procurement of reading books for supply to government primary schools also varies from state to state. There is clearly a need to standardize TLM procurement procedures across all states.

4.4 Distribution

The UBEC was established in 2004 and is a parastatal of the Federal Ministry of Education. UBEC is responsible for regulating basic education. UBEC coordinates the purchasing of primary school core-subject textbooks (English, math, science, and social studies) on behalf of those state governments eligible for support. The state governments indicate preferred choices of textbooks, and UBEC places orders for the supply of these books directly with the publishers on the basis of a sole source price negotiation. The publishers deliver to the state governments for onward distribution by state governments to districts and then to all government basic schools in the state. The effectiveness of state to district to school distribution varies from state to state.

Large commercial booksellers are few and concentrated in the main urban centers—particularly in Ibadan and Lagos. There are also many small

booksellers serving even remote corners of the country and selling school textbooks and reading books, mostly to private customers. For the larger commercial booksellers, it is the tertiary book market that is the principal focus, the sales of school textbooks to a large extent being seasonal at the beginning of the school year in September. Larger publishers have sales depots in key cities across the country and often promote, sell, and distribute direct to many private school customers themselves, leaving commercial booksellers out of the supply chain. Any Global Book Fund (GBF) intervention in local language reading books would probably have to rely on state/district distribution systems operating at the same time as the annual supply of free core textbooks financed by UBEC.

The current Boko Haram conflicts in northeastern Nigeria have effectively disrupted the distribution of school supplies of TLMs to the states and schools in this region.

4.5 Teacher Training Issues

A variety of reports have identified core teacher training requirements related to TLM provision as (a) the provision of good storage facilities, (b) school library provision, (c) the optimum use of books in class, (d) care and repair of books, and (e) improved management of TLMs.

The UNICEF RANA project operating in 30 schools in each of two northern states is focusing on teacher training to improve literacy in Hausa but is already encountering problems of inadequate Hausa language competency among teachers. The USAID-funded Reading and Access Research Activity (RARA) project has also invested in in-service teacher training in approaches to Hausa language teaching and literacy but once again only in 2 states and in a limited number of schools. The British Council is largely focused on improving English language competence among primary school teachers as part of the National Teacher Training Initiative (NTTI). The Nokia Life+ web app on their mobile phone provides primary school teachers in Nigeria with access to

high-quality English teaching techniques, resources, activities, and other materials. These tools are designed to enhance their teaching methods, support their continuous professional development, and maximize learning for students.¹²⁴

Primary textbooks in the four key subject areas of English, math, science, and social studies are paid for by UBEC and supplied free of charge to students in government primary and JSS schools. UBEC is funded by the Nigerian government via the MOE. States do not purchase the same books for all grade levels year after year. A state may purchase English books one year and then science and maths books the year after, etc.

4.6 Finance

Physical textbook specifications for government primary schools are minimal (60 gsm text paper with basic binding), but the books are expected to be used for between 2 and 3 years. Only those states willing to put up 50% of the purchase price are supported by the UBEC primary school book procurement program. At the time of writing, UBEC has not provided detailed information on the budget allocation required to support free core textbook supply to government primary schools. A simple calculation suggests that the provision of 4 textbooks to each of 20 million students at an average assumed unit cost of US\$2.00 spread over a three-year period with 50% purchase price contributions from states would require annual expenditures of around US\$44 million. Of this US\$44 million, US\$22 million would be contributed by UBEC, with an additional US\$22 million contributed by states. This amounts to approximately US\$2.20 per primary student per year. It should be noted that not all states take advantage of UBEC textbook financing every year. Some states contribute in some years but not in others. It is unclear from the data available why some states do not regularly access UBEC textbook funding.

All other specified non-core primary textbooks have to be purchased by parents. UBEC does not finance any reading book provision to government primary

schools. Individual districts responsible for primary education have different policies/strategies, and some may provide reading book supplies or provide school operational budgets sufficient to purchase some reading books. Although in principle LGEAs are responsible for delivering basic education, the World Bank commented in 2008 that they have little ability to control their budgets. Officially, they receive federal transfers for basic education, but few local governments have additional resources which can be allocated for the education sector. Due to the high and rising share of teacher salaries in education expenditures (over 90%), some local governments receive no transfers once teacher salaries have been subtracted from their federal share. This provides a perverse incentive for local governments: if enrollments go up, local discretionary income goes down, as education expenditures are deducted automatically.

In 2008, a World Bank report noted that, on the demand side, the high private out-of-pocket and opportunity costs of education are a major cause of low enrollment and of dropping out of school. Household income and school enrollment are strongly linked. Children who have never attended school come mainly from the poorest households, especially in the northern regions. In Kaduna, for instance, among the 7–11 age group, 48% of girls from the poorest 20% of households had never enrolled in school compared to 14% of girls from the richest 20%. On the supply side, the availability and quality of education institutions can play a significant role in determining the rates and patterns of enrollment, especially in basic education where the quality of primary is weak as is indicated by inadequate inputs (lack of textbooks, materials, and supplies), processes (poor quality of student–teacher interaction), and outcomes (low literacy levels and student achievement).

There is no agreement on standards as the national minimum standards that exist in law or in regulations are not enforced, or the resources required to meet established standards are not provided. To

¹²⁴ Oluwatosin, E. (2014). Nokia Life Center for Education Innovations. Retrieved 2016 from <http://educationinnovations.org/program/nokia-life-english-teacher>

improve learning achievement, standards have to be set, followed, and enforced. This is particularly necessary for teaching and learning materials.

The 2008 World Bank report also concluded that financial accountability was weak for various reasons: (a) insufficient voice and participation on the part of stakeholders; (b) inadequate information (about outputs, outcomes, and the sources and uses of education expenditures, especially at the state and local government levels); (c) weak management; (d) confusing roles and responsibilities; and (e) minimal incentives for efficiency at all levels of government.

Low accountability and limited transparency have a negative effect on the efficient and effective delivery of educational services. Nigeria is a data-poor country, and the lack of information on state and local expenditures for education makes accurate estimates of total spending impossible. The budget share at state and local government levels vary considerably, making it difficult to achieve an accurate national picture. Thus, in Enugu, the state/local government share in primary education expenditure in 2008 was 62% compared to 36% in Lagos.

Nearly all pupils' households spent money on books and stationery (DHS Education Data survey 2010).¹²⁵ Among pupils in urban areas, the mean expenditure on schooling (US\$70) was three times higher than the mean expenditure among pupils in rural areas (US\$23). The mean annual expenditure for pupils attending private schools far exceeded that for pupils attending government schools.

As might be expected, the more economically advantaged the household, the greater the mean total household expenditure per pupil on education. Mean total expenditure on a pupil from the highest quintile (US\$100) was more than ten times as high as the mean total expenditure on a pupil from the lowest quintile (US\$9.80).

4.7 School Management and Usage

According to UNESCO's 2012 GEM Report,¹²⁶ despite impressive enrollment gains, Nigerian primary school students in government schools are learning very little. The quality of primary schools and the competencies of their teachers are extremely low. Numerous studies have shown that there has been no improvement in learning outcomes for the past 15 years. Only 8% of Grade 2 pupils in one state managed to attain the required curriculum standard in English language, while in two other states 70% of Grade 3 pupils could not read a single word of a simple narrative text in the local Hausa language.

The Education Sector Support Program in Nigeria (ESSPIN)'s school improvement program aims to improve learning outcomes for all children, and it aims to achieve this through work on the five 'pillars' of school functioning. These pillars are: effective head teachers, competent classroom teachers, inclusive practices, school development planning, and effective school-based management committees.¹²⁷ Weak school management is widely perceived as a major cause of poor school performance. Many donor and NGO-funded projects include components aimed to upgrade school and head teacher management standards. Schools interviewed for this study confirmed that they were uncertain about how to use reading books in class and requested increased guidance on the use of reading books and the establishment of school and classroom libraries. Poor school storage and management of TLMs is a cause of high levels of TLM loss and damage.

4.8 Digital Opportunities

According to the Nigerian Digest of Education Statistics, 2010, fewer than 25% of Nigerian state and 39% of private primary schools had access to electricity. In the public schools, the range spanned

¹²⁵ National Population Commission, Nigeria; and RTI International. (2011). Nigeria DHS EdData Survey 2010. USAID. Retrieved from: <https://www.eddataglobal.org/documents/index.cfm?fuseaction=pubDetail&id=329>

¹²⁶ UNESCO. (2012). Global Education Monitoring Report.

¹²⁷ Antoninis, M. (2010). School Census Survey Follow-up Report. Education Sector Support Programme in Nigeria (ESSPIN).

from a high of almost 46% in Lagos State to a low of only 10% in Katsina State.¹²⁸ Only Kano State provided no data on access to electricity. The same data source recorded only 2,946 computers in state primary schools and only 1,450 computers in private primary schools in Nigeria in 2010. While UBEC has expressed a strong interest in integrating new technology into primary schools, the basic requirements of access to electricity, Internet connectivity, or the costs of disk delivery and sufficient hardware is unlikely to be afforded except on a pilot basis for some years to come. Individual better-funded private schools and perhaps some elite government-funded schools in urban areas may be in a position to introduce the use of digital reading materials. School interviews did not, however, note significant enthusiasm for this line of development.

E-publishing is limited. The African Story Book Project which is based in South Africa, sponsored by Comic Relief, and managed by the South African Institute for Distance Education¹²⁹ has illustrated children's reading books in English and other languages that are free to download. Cambridge Education is running a World Reader pilot project using Kindles in 20 schools in Sokoto and Lagos states as part of the ESSPIN project. There are also 38 out of 78 Sesame Square (Nigerian version of Sesame Street) episodes now available in Hausa and which could be made available for downloading.

The widespread development of a digital reading framework in Nigerian government primary schools within the near future is unlikely for resource and infrastructure reasons. Schools have low levels of access to computers and electricity and have inadequate school operational budgets to pay for digital reading materials and Internet access. Teachers are also untrained in digital operations, and there is widespread sub-standard school storage and management.

5. Discussion and Opportunities for a Global Book Fund

Although Nigeria has a policy to use catchment area local languages as the LOI in the first three grades of primary, this is not enforced by the Federal Ministry of Education (FME) and is widely ignored by states, LGEAs, and schools. Although there is donor/NGO support for the development of literacy in local languages (largely Hausa but also to a lesser extent in Igbo and Yoruba), relatively few states and schools are involved in these projects. The small scale of these projects means that it is likely to take time before the dominant role of English as the national LOI for primary schools can be challenged. The UBEC has recognized that one of the causes of the widespread poor performance reported throughout the Nigerian education sector is the sub-standard achievement of literacy in primary schools, thus the achievement of early literacy is now a UBEC priority.

A large part of the poor performance and low-level literacy achievement is the persistent long-term under-funding of the non-salary costs of the education system, in general, and the provision of appropriate TLMs, in particular.

There is a developing awareness in some states (but probably not in all) that the availability of good quality reading books in schools, combined with their effective management and use in the classroom, could be an important contributing factor in the achievement of early literacy. It is likely, however, that an increase in demand would focus primarily on English language readers with lower levels of initial interest in Hausa, Yoruba, and Igbo. A number of donor/NGO-funded projects have already developed readers, workbooks, lesson plans, and teachers' guides in support of Hausa language literacy.

With more than 20 million primary students enrolled in government primary schools and a rapidly growing private primary school sector, print runs for both English language and Hausa language reading books

¹²⁸ Federal Ministry of Education. (2010). Digest of Education Statistics.

¹²⁹ African Storybook. (2015). Retrieved from <http://www.africanstorybook.org>

resulting from a GBF intervention would easily be large enough to achieve the best possible prices. The Hausa language market extends considerably outside Nigeria's borders into Niger and other Sahelian countries, and print runs could be expanded to provide Hausa language reading books for these external markets.

Nigeria possesses a highly developed and well-financed publishing industry which has access to proven authorship talent at the primary level in English, Hausa, Yoruba, and Igbo. The publishing industry has well-established links with international printing centres in China, India, and Malaysia and could easily achieve best manufacturing prices. It would be sensible for donor-funded/GBF efforts to develop a higher reading book profile in primary schools and to collaborate actively with the established Nigerian publishing industry.

TLM distribution to schools works well in some states but less well in others, and more work is needed to develop a comprehensive national distribution strategy that would guarantee efficient on-time deliveries to all schools in all states. There is also a need to develop minimum procurement standards which can be applied equally in all states and LGEAs.

Perhaps the best way of ensuring that identified teacher training and school management issues in support of TLM provision are progressed is to make a specified list of conditions for a GBF intervention, which would include a regular budget for monitoring. Similarly, agreement on GBF sustainability could be an intervention condition.

The lack of appropriate and up-to-date national EMIS data is a major constraint on all aspects of educational planning and would have an adverse impact on the planning and implementation of any national GBF intervention in the state primary school sector where there are already significant regional, gender, and urban/rural differentials.

There is little prospect in the near to mid-term of the development of digital reading requirements for government primary schools.

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7. Appendix

7.1 Appendix 1: Interview List

COMPANY	TYPE	CONTACT PERSON	POSITION
Evans Brothers Ltd, Ibadan	Publishers	Dauda Lukman	Acting MD
HEBN, Ibadan	Publishers	Olawepo Sogo	MD and CEO
University Press Plc, Ibadan	Publishers	Olajide Jegede	HR Mgr
Aqua Green Ltd, Lagos	Publishers	Tunde Tijani	MD/CEO
Learn Africa Ltd	Publishers	Gbola Ayedun, Segun Oladipo, Bello S. Olajumoke Akanmu	Publishing Director & Publishing Head
Liframed Publications Ltd, Lagos	Publishers	Bello S. Olajumoke	Snr Cust Rel Officer
West African Book Publishers	Publishers	Hyacinth Egbulem	Editorial Coordinator
A. Joji Publishers, Kano	Publishers	Adamu M. Yusuf	MD/CEO
Fidan Publishing Co. Ltd, Kano	Publishers	Malam Aminu Tafida	Chairman/CEO
NNPC, Zaria	Publishers	Mahmud B. Bambale	Ag GM
Daybis Press Ltd., Ibadan	Printers	Oladayo Popoola	MD/CEO
Jexcel Commercial and Security Printers	Printers	M.A. Williams-Egbah	Gen. Mgr
Academy Press Plc.	Printers	John A. Oluyemi	Manager, Estimating
Clear Impressions Ltd., Kano	Printers	Iro Ibrahim Yahya	MD/CEO
Daily Trust Press	Printers	Abdulahi M. Ladan	Ag GM (Kano Regional Office)
The Booksellers, Ibadan	Booksellers	Kolade Mosuro	MD/CEO
Zamani Books & Stationary Stores, Kano	Booksellers	Benard M. Ogbodobri	Chairman/MD
Havilah Merchants Ltd., Lagos	Bookseller/Distributors	Dare Oluwatuyi	GM (Marketing)

COMPANY	TYPE	CONTACT PERSON	POSITION
UMC Demonstration School, Ibadan	Schools		Head teacher
Kawo/Ungwar Gaya Primary School, Kano	Schools		Head teacher
Racecourse Model School, Kano	Schools		Head teacher
UNICEF, Abuja	Donors	Heinrich Rukundo, Charles Avelino & N. Lawal	Heinrich Rukundo, Charles Avelino: Educ Specialists
DFID Nigeria	Donors	Esohe Eigbike	Education Adviser
USAID Nigeria	Donors	Timothy Curtin	Dep Team Leader (Ed)
Reading Awareness Society for Development	Implementers	Bukola Ladoja	Founder
RTI International	Implementers	R. Drake Warrick	Chief of Party
British Council	Implementers	Louisa Waddington	Director of Programs

7.2 Appendix 2: Notes on Donor/NGO Activities

DFID

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- ▶ Primary school literacy is an important area. Donors have not done enough. Support systems: 15% of UBEC budget is for instructional materials. UBEC purchases core-subject textbooks for states: English, maths, social studies, science, but no supplementary readers.
- ▶ DFID provides support under ESSPIN (Education Support Programme in Nigeria) for planning and budgeting in ministries of education in Kano, Kaduna, Jigawa, Zamfara, and Enugu states. ESSPIN also focuses on school improvement via head teacher training and community forums. Structured lesson plans are provided to upgrade teacher competence for primary classes 1 to 5. There has been no significant work on the learner side. ESSPIN was designed to provide support

for governance. (16,000 schools involved and 5.5 million students).

- ▶ There is also a small ESSPIN pilot project in 20 schools in Kaduna and Lagos states working on Kindles with World Reader which Cambridge Education is about to implement. This will provide resources in Hausa, Yoruba, and Igbo and readers with text-to-speech. There is a lot of enthusiasm for putting technology into schools.
- ▶ A Teacher Development Program (TDP) using mobile phones to deliver content in Hausa and English focused on pedagogy and classroom management has been piloted in Katsina, Zamfara, and Jigawa states and will next year be implemented in Kano, Kaduna, and Niger states.
- ▶ USAID has been planning a major local language program for some 3 or 4 years which has not been implemented yet. A bridging local language project, Reading and Access Research Activity (RARA), has been managed for USAID by RTI. The project has gathered data and is utilizing ESSPIN lesson plans in order to create an approach for teachers to teach in Hausa and pupils to learn in Hausa, so far only

for P2. There has been in-service teaching training and the project, only in Sokoto and Bauchi states, has developed instructional and reading materials in Hausa. The materials are open source. RARA may be extended to P1 and P3.

- ▶ NERDC (Nigerian Educational Research and Development Council) with support from USAID has developed a reading curriculum for primary schools.
- ▶ Girls Education Project (GEP): Phase 3 is intended to work towards integrating Quranic education and Hausa learning and is implementing now in Katsina and Zamfara states. FH1360 is being contracted by GEP 3 to research a program for early learning intervention in local languages, developing a more coherent picture of where the gaps are.
- ▶ There has been no national EMIS data published since 2003. At a state level EMIS data for 6 states is available on the ESSPIN website.

USAID Nigeria

Tim Curtin, Deputy Team Leader—Education

- ▶ RARA: Despite significant gains in the number of children participating in formal schooling in Nigeria, education quality remains low, particularly in the north. For example, recent early grade reading assessments conducted in Bauchi and Sokoto states revealed that the majority of pupils in Primary 2 could not read a single word of a short story in Hausa. Moreover, millions of children in Nigeria still do not attend formal school. To address these challenges, the Nigeria Reading and Access Research Activity (RARA), funded by the U.S. Agency for International Development (USAID), is conducting research and evaluating strategies for improving early grade reading and access to education in Northern Nigeria. RARA is assisting the Nigerian government with the development and testing of an instructional model to improve the Hausa reading skills of Primary 2 children in Bauchi and Sokoto states. Research results will inform the development of effective and affordable scale-up strategies that address reading. The RARA reading

approach is designed to improve early reading skills in Hausa by providing appropriate instructional and learning materials, teacher training, and ongoing, school-based coaching support to teachers. RARA is evaluating this approach through a randomized controlled trial design. One group of 60 schools is participating in RARA activities (treatment group), while a second group of 60 schools is not (control group). Teachers' instructional practices and pupils' reading outcomes will be measured at the beginning and end of the 2014–2015 school year—both before and after RARA implementation. The results for the control and treatment groups will be compared to identify changes that may be attributable to the RARA approach. To involve stakeholders and to build their knowledge of the research design and implementation process, RARA convened a Reading Advisory Committee and Technical Working Group composed of officials and professionals from the State Universal Basic Education Board (SUBEB), the Ministry of Education, colleges of education, school-based management committees, Local Government Education Authorities, traditional leaders, and civil society organizations. These groups provide guidance, raise awareness and support, and share findings. The Technical Working Group further played a key role in the development and implementation of the approach and materials. RARA's research results will deepen understanding of how to improve reading instruction and the Hausa reading skills of children in the early grades. Results will also inform decisions by government, donor partners, civil society, and the private sector regarding the feasibility and effectiveness of activities that can be taken to scale in Northern Nigeria to improve early grade reading in Hausa. RARA started in February/March 2014. The research has been principally in Hausa, and the project may possibly be extended. The project has been run by RTI. Materials developed for RARA are freely available for use under Creative Commons by license. Data and other downloads available from <https://www.eddataglobal.org> and <https://dec.usaid.gov>.

- ▶ Education Crisis Response—Grade 3: non-formal learning, 296 centers each with an average of 50 students aged between 6 and 17 years old—Adamawa, Bauchi, Gombe and Yobe states—14,000 students enrolled—coordinator is Creative Associates. Updated materials being uploaded.
- ▶ The children’s TV series Sesame Square was recently bumped from the national TV network NTA just as it was being dubbed into local languages. These dubbed versions are now expected to be shown on commercial stations. See Dr. Margee Ensign, American University of Nigeria, Adamawa.
- ▶ Nigerian Education Data Survey (NEDS 2015): 36,000 families surveyed across all 36 states. USAID & DFID funded, contractor RTI.
- ▶ Northern Education Initiative: USAID funded, contractor Creative Associates, in Sokoto and Bauchi states, strengthening planning and EMIS systems.
- ▶ GPE: \$100 million grant. USAID is the coordinating agent and the World Bank is the supervising agent. The focus is on 5 northern states: Jigawa, Katsina, Kano, Kaduna, and Sokoto. Support is for the implementation of education plans. Very much a country-led initiative.

UNICEF Nigeria

Heinrich Mutsinzi Rukundo, Education Specialist

Charles Avelino, UNICEF Education Specialist

Nurudeen Lawal, Project Director, Reading & Numeracy Activity (RANA) Project (UNICEF/FHI360)

- ▶ RANA (Reading & Numeracy Activity Project) is implementing in Katsina and Zamfara states and is a 3-year project. The focus will be on primary not JSS. The project will be access-related (Girls’ Education Project). The project will address teacher training and governance. RANA will focus on children with an emphasis on Hausa literacy. The project is now in initial stages; the contract was signed in September. The plan is to integrate gender themes and numeracy into TLM. A major feature of the project will be how the community

can support reading in schools. There will be ‘reading champions’—who will be members of the governing council of a school. Champions will develop literacy skills guides. The project will consider using USAID’s RARA materials. The project will be introduced to 30 schools in each of the 2 states, rising to 100 by April 2016. The first RANA reading package will be ready by the third term of the 2016 school year and will include: teachers’ and trainers’ guides, read-aloud materials and pupils’ workbooks, but no big books. The materials for P1 and P2 will be introduced in this school year and those for P3 in the 2016–17 school year. See FHI360 blog to follow progress. Trainers from colleges of education in each state. Will provide certification of successful completion of training. Mobile phones will be used for monitoring and data collection.

- ▶ RARA statistics indicate 70% of teachers can read Hausa. Nurudeen thinks the figure is probably closer to 30%.
- ▶ Sesame Square—38 of 78 programs are now available in Hausa, together with artwork for teacher training and a phone app for the use of teachers and parents.
- ▶ UNICEF purchased for states in conflict some Hausa language textbooks and teachers’ guides, all glossy and printed in 4 colors, from Aqua Green Limited of 40 Opebi Road, Ikeja, Lagos.
- ▶ Issues with states include: too few competent teachers, absence of Hausa reading periods, teachers not being posted to project schools.

British Council

Louisa Waddingham, Director of Programmes

Yetunde Oluwatosin, ELT Project Manager

Caroline Grant, Head of English for Education Systems in West and Southern Africa

- ▶ National Teacher Training Initiative: Worked with the program to improve the quality of the teaching of English and the teaching of other subjects to students with some but not an adequate understanding of English. 4,000 teachers have completed the program since 2012.

- ▶ Learn English audio project: Worked with ESSPIN to develop some audio material mapped on to ESSPIN lesson plans and the national curriculum. A solar-powered MP3 player with an SSD card for expansion, a USB input, and recording facility was developed and used in Kwara and Jigawa states. The Open University is evaluating the program and similar programs in South Africa and Ethiopia.
- ▶ Policy work: Have trained researchers in language policy with the focus being on English as the medium of instruction. John Simpson and Caroline Grant: scoping report on language policy. Results expected November 2015 and will evaluate the impact on learning outcomes of having to teach in English.
- ▶ The Language & Development Conference was held in November 2015 in New Delhi. The last conference was in Cape Town in 2013.
- ▶ The British Council would be interested in supporting GBF in the areas of dissemination, publishing, and teacher support.
- ▶ The BC is supporting the Ghana Reading Project funded to the value of US\$72 million. The Council is working with USAID. A key feature is promoting the local publishing industry, mainly focused on upgrading local languages capacity for kindergarten to P3. The Council's input is into the transition from local language as LOI in P3 to English as LOI in P4.

RTI International

R. Drake Warrick, Chief of Party, rwarrick@rti.org

- ▶ Reading and Access Research Activity: Focused on early grade reading and access. Analyzed early grade reading materials in Hausa available in Niger and in Nigeria. From the analysis, RARA developed its own materials: a pupils' reading book, a read-aloud book, and a teacher's guide, all for P2. The project provided training for school support officers. The project was intended to show improvement through early grade reading and the assessments showed that this had been achieved. The project operated in 30 treatment and 30 control schools in Bauchi and Sokoto states. The materials were piloted twice and the development of the final materials took 6 months. The project took into account some of the work ESSPIN had done. Cambridge Education adapted some of the ESSPIN teacher training material for RARA. Teachers liked the materials and reported that pupils had benefited. Print runs: 5,000 copies of the pupils' reading book and 200 copies each of the read-aloud book and the teachers' guide. The pupils' reading books were supplied in a ratio of 1 book/pupil. The books are freely available to use under Creative Commons licensing.
- ▶ Drake's recommendation is that for further use across Northern Nigeria the USAID logo should be removed from the books.

Global Book Fund Country Study

PAKISTAN–SINDH PROVINCE

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1. Methodology

The Pakistan country study was conducted by Anita Shah Lakyary, consultant for International Education Partners (IEP), over the course of October 2015–January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

This research study was conducted through interviewing representatives of all the main stakeholders in the book value chain, both public and private, including urban and rural government and private primary schools, project implementers, publishers, printers, booksellers, donors, non-governmental organizations (NGOs), the Ministry of Education (MOE), the Ministry of Culture (MOC), etc. The study was undertaken in five districts of Sindh province covering both urban and rural areas including Karachi, Hyderabad, Shaheed Benazirabad, Khairpur, and Sukkur. In addition, virtual interviews were conducted. A complete list of interviews is provided in Appendix 1 and references in section 7 of this document. The interviews were supplemented by desk research. The country background and context research for this study was conducted in the UK by IEP.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background and Education System

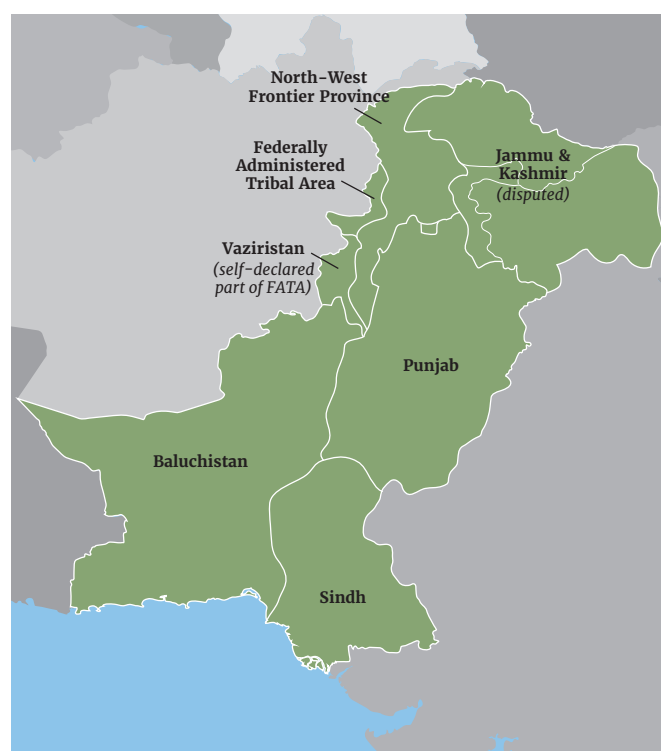
Pakistan's population is 199,085,847, living in a total area of 796,095 km² (seen in Figure 1). National population density is 280/km². 63.4% of the

population live in rural areas with 36.6% classified as living in urban areas. The annual average population growth rate is currently 1.92%.¹³⁰

Adult literacy in Pakistan¹³¹ is 57.9%, with male literacy at 69.5% and female literacy at 45.8%, indicating a significant literacy gender gap. According to the UNESCO Institute of Statistics, the annual national per capita income is US\$1,260, categorizing Pakistan as a low income country.¹³²

In Pakistan the federal MOE is responsible for policy, and the Sindh Education and Literacy Department is responsible for the implementation of policy in Sindh. There are differences between the education systems in Pakistan's provinces. In Sindh, an 11-year system operates with primary spanning kindergarten to P5, followed by 3 years of middle school, and then 2 years of secondary school. Sindh has almost 49,000 primary schools, of which 91% are government schools and

Figure 1: Map of Pakistan



¹³⁰ CIA. (2015). World Factbook.

¹³¹ Defined by the CIA World Factbook as *age 15 and over who can read and write a recognized language*.

¹³² World Human Development index of 146.

9% are private.¹³³ Only 13% of government primary schools are classified as urban.

The government primary school population has been estimated at 3.3 million,¹³⁴ with grade level enrollments ranging from 800,000 in P1 to 400,000 in P5. The GER is 90%, and the net enrollment rate (NER) is 57%. Student attendance rates are estimated at 37% for government schools and 63% for private schools. Many government schools are “shelterless,” with pupils studying in the open. For these schools, libraries and storage are difficult. Lack of middle school and secondary school spaces means that drop-out rates at the end of primary are high.

Many primary schools in rural Sindh are single room, single teacher schools, where all the students ranging from grade 1 to 5, along with kachi (kindergarten) students, are taught. Even if the primary school is a two room school, it often has only one teacher. There is a small proportion of schools where five or six rooms cater to all primary students. Some primary schools have enrollments as low as only 5–10 students.

Ghost teachers are another reason why many schools are closed. Ghost teachers pay a small percentage of their salary as a bribe to the education administration. In exchange, they are paid by the government, but never actually teach.

Absenteeism from class in government primary schools is also reported to be a problem. Teachers might be in school but are often reluctant to leave the teachers’ room to go into class and teach. As a result, student performance is impaired, parents lose trust in the school, and students drop out.

The number of private schools continues to grow as parents who can afford private education become increasingly disenchanted with poor performance in government schools. For marketing purposes, publishers classify private schools into up-market, middle-market, and down-market schools based on fees charged and the level of funding available for

teaching and learning materials (TLM) and other resources. The Government of Pakistan has recently tried to control private school fees and mandated that schools reimburse parents for overcharging. In return, the private schools have taken legal action against the government and, in Punjab, government action to fix fees has been put on hold by the courts.

2.2 Country Language Profile

Although Urdu is a minority language in Pakistan (Table 1), it is the official language. Fewer than 8% of the population speaks English, but it is also an official language spoken by the Pakistani elite and most government ministries.

Table 1: Languages of Pakistan¹³⁵

Language	Percent of population
Punjab	48%
Sindh	12%
Saraiki	10%
Pashtu	8%
Urdu	8%
Balochi	3%
Hinduku	2%
Brahui	1%
Other	8%

The Sindhi language is widely spoken in both Pakistan and India, but written Sindhi uses different scripts in each country—the Persian/Arabic-based *nask* and/or *nastalikh* scripts in Pakistan and the Hindi-based *Gurmukhi* or *Devanagari* script in India, so children’s readers are not mutually comprehensible for early grade reading books between the two countries.

Sindhi is an Indo-Aryan language of the historical Sindh region spoken by the Sindhi people. It is the official language of the Pakistani province of Sindh. In India, Sindhi is one of the scheduled languages officially recognized by the federal government.

¹³³ MOE MIS data.

¹³⁴ Education and Literacy Department. (2015). Sindh Education Management Information System’s Sindh Education Profile. Karachi: Government of Sindh.

¹³⁵ CIA. (2015). World Factbook.

Most Sindhi speakers are located in Sindh province in Pakistan. In India, Sindhi is widely spoken in the Kutch region of the state of Gujarat and in Ulhasnagar region of the state of Maharashtra. The remaining speakers in India are composed of the Hindu Sindhis who migrated out of Pakistan during the partition period after independence in 1947. There are an estimated 40 million Sindhis living in Pakistan, with 39.5 million in Sindh and over 500,000 living in other Pakistani provinces. About 16% of the population of Sindhis in Pakistan are Hindus. Most of them live in Umarkot and Mithi or urban areas such as Karachi, Hyderabad, Sukkur, Mirpur Khas, Dadu, Larkana, and Jacobabad.¹³⁶

Sindhi is also spoken in India in the states of Rajasthan, Gujarat, and Maharashtra. The total Sindhi-speaking population in India and Pakistan together is over 45 million. There are 40 million Sindhi speakers in Pakistan and 5 million in India, plus another 2 million in the wider Sindhi diaspora.

Sindhi literature has flourished during the modern period (since 1843), although the language and literary style of contemporary Sindhi writings in Pakistan and India were noticeably diverging by the late 20th century; authors in Pakistan were borrowing extensively from Persian and Arabic vocabulary, while authors in India were strongly influenced by Hindi.

2.3 *Language of instruction (LOI) Policy*

There is no federal LOI policy, as each province is responsible for its own LOI policy. In Sindh, 75–80% of government primary schools use Sindhi as the LOI with Urdu taught as a compulsory curriculum subject throughout primary and secondary education. English is also often a curriculum subject, even in government primary schools, if teachers are available. Where Urdu or English are used as LOIs, Sindhi is usually taught as a compulsory subject.

Private schools can choose their own LOIs, and most teach in either Urdu or English.

3. Current Print and Digital Reading Book Provision

The Sindh Education and Literacy Board (SELB) has recently developed a new policy for early childhood education which is awaiting the Sindh cabinet's approval. The policy is reported not to include any provision for reading book supply, and the MOE has no policy for the development and use of reading books. The MOE have stated that they are barely able to provide textbooks to state-owned schools, so providing reading books, including primary grade reading books (PGRBs), is not possible bearing in mind current financial constraints. As a result, in government primary schools, reading books are rarely available because reading books are not financed and provided by the Provincial Textbook Board; only 1% of government primary schools have school libraries and even fewer have classroom libraries. School operational budgets are inadequate for government schools to invest in their own reading book purchases, and in rural areas where most government schools are located, there are few bookshops. The great majority of teachers in Sindh government schools are not aware of the importance of reading books in achieving early literacy and upgraded student subject performance standards and have never been trained to use them in the classroom.

In Sindh government primary schools, reading books are available only where donors or NGOs have intervened. For instance, USAID is working through the Pakistan Reading Project and the Sindh Reading Program. In addition, the Aga Khan Foundation is working through their Learning Resource Center program funded by CIDA and the Aga Khan Foundation, Canada. Similarly, the Indus Resource Center (IRC) is working via Chemonics with USAID funding. These programs have provided selected schools with reading books and trained their teachers in their effective use. Books provided under these programs are mostly in English and Urdu and only rarely in Sindhi. However, in most government

¹³⁶ Ibid.

schools, the majority of students come from Sindhi families and would find it much easier to read in Sindhi rather than in Urdu and English. Reading books in government schools are reported to be targets for theft, and are then sold to local markets. The impact of donor and NGO funding for reading books in government primary schools is slight because relatively few schools are involved.

Up-market private schools often have well-stocked school and classroom libraries. Middle-market private schools have school libraries and a few have classroom libraries. A few down-market schools have school libraries. However, most private schools are very ambitious and want to improve. Down-market schools are also the largest segment of the private school sector. Currently, publishers report that most of the reading books sold to private schools are in Urdu and English. The mainstream, middle-market, private primary schools have reading books, and they often have set periods for reading of 45-minute sessions twice a week. Their major focus is on English and Urdu. They do not have many Sindhi books in their classrooms or libraries. They commonly have one class for Sindhi a week where they do not necessarily encourage reading. The private schools promoting Sindhi as a language have more reading books in Sindhi and fewer in Urdu and English. There is no coordination between MOC and MOE or any other government department or institution on the issues of library development and the encouragement of children's books in local languages.

There is no significant use of digital reading books in either government or private primary schools.

4. Country Findings and Market Gaps

4.1 *Authorship and Publishing Capacity*

Local authorship of primary reading books is well-developed in Urdu and English but is less available in Sindhi. Sindhi traditional stories and folk tales are popular. Publishers report print runs of 100,000+ for

Urdu and English reading books which are sold mostly to the private school market and to parents who can afford them. In contrast, Sindhi reading books have typical print runs of only 1,000–2,000 copies, although popular titles of folklore and traditional stories can reach print runs of 10,000–20,000. Sindhi reading book prices range from PKR100–400 (US\$0.94–3.77),¹³⁷ although PKR15–30 (US\$0.14–0.28) is considered to be more realistic for the Sindhi language market. Typical production specifications are text paper 68kg2 wood-free, cover card 110kg2 varnished, 4 color printing. These specifications are unlikely to achieve long classroom life. The reason why Sindhi books aren't being sold is reported to be the lack of investment in publishing high-quality books in the Sindhi language. However, during the last couple of years, the help of the Sindh Reading Program (SRP) and Pakistan Reading Project (PRP) and the way USAID has encouraged the publishing of supplementary reading materials in Sindhi has resulted in the publication of high-quality books for children by Sindhica Academy in Sindhi and illustrated with beautiful, original paintings. Investing in Sindhi reading books is likely to be very rewarding, as the market for Sindhi books is huge; only it has remained unaddressed.

Extended print runs for Sindhi language reading books resulting from purchases by the SELB for government schools would reduce prices and increase sales potential in the commercial school market. Although Sindhi authors, illustrators, and publishers could be utilized, they would need orientation before they are commissioned to produce a new generation of Sindhi primary level reading books.

The local publishing industry is capable of producing good quality reading books for primary levels in Urdu and English, and it could handle children's books in Sindhi, as well, if a viable market existed. Mass market publishing by the private sector is focused on textbooks for private schools and adult fiction and non-fiction books, newspapers, and magazines. The publishing of children's reading books is a lower priority for most publishers. Oxford University Press,

¹³⁷ PKR to US\$ exchange rates are based on December 31, 2015 rates from Oanda.com.

one of the major publishers in Pakistan, has a current list of primary school readers of a little over 500 titles, of which 300 are in English, 200 in Urdu, but only 15 in Sindhi. Roshni publishers has a backlist of 786 children's books, which is 14.63 % of all their publication. Of these, 115 titles are in Sindhi. The main English language and Urdu language publishers are Oxford University Press, Paramount, Danesh, and Gaba. Cambridge University Press and Pearson sell secondary school textbooks in English through local agents. The main Sindhi language publishers are Sindica and Mehran Publishers, both of which publish readers in Sindhi for primary levels priced at PKR80–100 (US\$0.75–0.94). Iqra and Babs Publishers publish Sindhi language textbooks. Most of these publishers are based in Hyderabad. Gaba Publishers based in Karachi publish Sindhi readers for pre-primary and *khush khati* for Grades 1–5. Sindica and Roshni are the two largest publishers of Sindhi language children's books.

The demand for PGRBs and reading books in Sindhi through a Global Book Fund (GBF) intervention would increase Sindhi language reading bookprint runs, thus decreasing prices.

4.2 Printing

All the textbooks and reading books published in Sindh and Pakistan, more broadly, are locally printed. Only a small fraction of elite schools use imported English books for O and A levels. The Indian printing industry, in comparison to that in Pakistani/Sindhi, is larger and more advanced in terms of capacity, equipment, quality, and price. This is due to the expansive reading market and reprints of popular books in India. Pakistan is not on par with the Indian printing industry in terms of binding and other aspects of printing, but it is relatively low cost and is developing in terms of quality.

4.3 Procurement

Textbooks for government primary schools are published by a state monopoly run by the Sindh Provincial Textbook Board without the involvement of private sector competition. Budgets are tight and quality is low as a result. There is no state provision

of reading books to government schools, and thus there are no procurement procedures.

Supply of textbooks and reading books to the private school sector is competitive based on school selection and purchasing from private sector publishing and bookselling sectors using their own available purchasing budgets.

4.4 Distribution

The MOE is responsible for the annual distribution of textbooks to all government schools at primary, middle, and secondary school levels, which it accomplishes mostly successfully every year. The MOE is thus competent to achieve successful distribution of primary readers to all government schools in Sindh, but the major issues with government supply are reported to be a lack of transparency, political interference, and delays. If these issues are addressed, the MOE can distribute reading books to government schools. No private sector stakeholder is considered to have the network or resources to fully penetrate into the grassroots level in rural areas and to reach the most difficult of schools. For private schools, publishers either supply direct (estimated at 25%) or via booksellers (estimated at 75%).

4.5 Teacher Training Issues

There are many untrained teachers in government primary schools, sometimes recruited through a faulty recruitment system where bribes and contacts are reported to have undue influence. Many of these untrained teachers have difficulty teaching using textbooks and often have no idea how to use reading books in class. Because teachers in government primary schools have never had access to reading book collections and have never previously used them in the classroom, the effective use of readers in government primary school classrooms will be possible only if teachers are trained to use them effectively. A number of donors and NGOs have already developed teacher training programs in the effective use of reading books in the classroom. This training should also include the sensitization of

parents and communities to the importance of easy access to reading books as a critical factor in the achievement of early literacy.

Teachers at government primary schools who have received adequate training through the Strengthening Teachers Education in Pakistan (STEP) project conducted by the Aga Khan Foundation are more motivated and better trained to use readers effectively in class. Similarly, the teachers who have been trained by USAID's Pakistan Reading Program and Sindh Reading Program are also aware of the importance of readers in the early achievement of literacy. Teachers in private schools are also more aware of the importance and use of readers in class.

Primary grade readers should be provided in Urdu and Sindhi. English language readers are not a priority in government primary schools in Sindh because there is no transition to English as an LOI.

4.6 *Financing*

Provincial Textbook Board textbooks are provided free to all government schools every year, who then issue the textbooks to students. They are paid for by the provincial government. In 2015, PKR1.2 billion (US\$11.3 million) was allocated to the MOE for the printing and distribution of free textbooks for government schools. Government textbooks are rated as low quality in content and in production standards. Durability is poor, and book life is rarely more than one year, often less. The Textbook Board provides no reading books in any language to government primary schools. Commercial publishers sell textbooks and reading books to the growing private school market.

4.7 *School Management and Usage*

School management in both private and state schools is adequately motivated to deal with the management of TLMs where they have received training. At the moment, textbooks supplied by the Provincial Textbook Boards are issued to students as soon as they are received by the schools and thereafter become the responsibility of students and

parents rather than the school. Because no reading books are provided to government primary schools, no management systems have been developed for textbooks or for primary reading books. If a GBF intervention provides reading books to schools, then suitable management systems will need to be designed, including addressing storage and conservation issues.

4.8 *Digital Opportunities*

The Sindh MOE has no firm plans for investment in information and communications technology (ICT) in primary schools. Under the Sindh Basic Education Program's Memorandum of Understanding with Intel, ICT will be introduced into approximately 400 schools. There will also be ICT labs in the 100 schools being built under this activity. ICT plans are also agreed to be part of the establishment of Microsoft Academies in 40 high schools, with at least one school in each district of Sindh. The Academies will have 10 to 15 computers, relevant furniture, internet connection, air conditioning, generators, notice board, etc. Only 26% of government primary schools currently have access to electricity, and in rural areas it is probably less than 15%. No government primary school is reported by the MOE to have Internet access. The MOE reports that there are only 8,500 computers in almost 49,000 primary schools, most of which have been provided by donors or NGOs. This hardware is provided for the use of teachers rather than students. Up-market private primary schools will usually have computer rooms for students, but no information is available on typical computer/student ratios in private schools.

Under these circumstances, there is no short to mid-term possibility of a province-wide digital reading framework. In the private school system, there is at least the possibility that some elite schools will have the capacity to introduce digital reading. Oxford University Press, as an example, publishes some digital support software for pre-school and primary grades for science, English, Urdu, math, ICT, and social studies, but it publishes no reading books in digital formats for sale to schools and parents.

5. Discussion and Opportunities for a Global Book Fund

A Global Book Fund intervention would need to incorporate existing market stakeholders such as SELB, development partners, authors, illustrators, designers, publishers, and distributors.

Customized training and capacity building in primary reading book authorship, illustrations, design, and publishing skills in the Sindhi language are recommended because of the current diminished market demand for Sindhi language primary reading books.

The need for a Global Book Fund intervention is high, since there is little or no provision of primary grade reading books to government primary schools except for a limited number of schools where books and library skills are provided by donors and NGOs (e.g., the Aga Khan Foundation, The Asia Foundation, Chemonics, and USAID). There are public libraries in the urban centers run by the Ministry of Culture, but these are predominantly used by higher secondary and tertiary level students and are only sparsely utilized by primary school students. A GBF intervention could fund the provision of primary school reading books in Urdu and Sindhi, particularly, but on condition that the MOE in association with donors and NGOs take responsibility for the development of primary school and classroom libraries, reading corners, book banks, mobile libraries, and community libraries. Further, there should also be a requirement for the introduction and encouragement of reading by training primary school teachers; there is also a need to motivate parents and communities in partnership with the MOE on the need for early literacy and the role of reading books in achieving this. These conditions represent a massive caveat that their sector plan to date indicates is not feasible given lack of resources. Thus, a more practical menu of conditionalities needs to be agreed between SELB and development partners

There are gaps in the current development of local languages. The PGRBs in Sindhi are needed

by students and teachers, as the books provided by current donors are mostly in international and regional languages. These books are often underutilized because they are not well-understood by students, parents, and teachers at the grassroots level. A GBF intervention could collaborate with the MOC and MOE to sensitize the Sindhi Language Authority and the Sindhi Adabi Board to support the creation of PGRBs and reading books in Sindhi.

The Sindh Textbook Board already delivers textbooks to all primary schools every year; it could also take on the distribution of reading books to schools if a GBF reading book intervention were contemplated.

Although printing is less well-developed in Pakistan than in India, there would be political complications in printing Sindhi reading books for Pakistan in India. But Pakistan is also a low cost printing center, though less competitive in quality and services, so printing could take place in-country.

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7. Appendix

7.1 Appendix 1: Interview List

Organization Type	Contact	Role
Ministry of Education	Fazlullah Pechooho	Secretary, Education and Literacy Dep. Sindh
	Abdul Majeed Bhurt	Sindh Teachers' Education Dev. Authority
	Syed Zakir Shah	Chairman Sindh Textbook Board
	Akber Memon	District Education Officer Hyderabad District
	Zahid Jatoi	Sindh Education Management System (Semis) Reform Support Unit MOE
Ministry of Culture	Niaz Ali Abbasi	Secretary of Culture
	Sachal Sarmast	Assistant Director – Library Khairpur Mir's Ministry of Culture
	Aisha Baloch	Shamsul Ulema Daudpoto Library Hyderabad
Publisher	Khalid Aziz	President Pakistan Publishers and Booksellers Association
	Ameena Sayiid	CEO, Oxford University Press
	Raheela Faheem Baqai	Oxford University Press
	Kashif Ahmed	Oxford University Press
	Aabdul Rehman Sheikh	Star Educational Publishers – Sukkur
Booksellers	Ali Nawaz Ghangro	CEO Roshni Publishers
	Aabdul Samad Sheikh	New Khairpur Book Store

Organization Type	Contact	Role
Printers	Noor Ahmed Memon	Sindica Academy Printers and Publishers
Donors/NGOs	Ghulam Issa Khan	Agha Khan Foundation DFID Pakistan
Schools		Librarian at Government Primary School Gharibabad District Sukkur (Urban School) Head Teacher at Government Primary School Naya Madarsah Nawabshah, District Shaheed Benazirabad (Urban School) Head Teacher Government Primary School Bahawal Zaunr District Hyderabad (Rural School) Head Teacher Government Primary School Wanki Wasi District Hyderabad (Rural School) Head Teacher Government Primary School Mori Mangar District Hyderabad (Rural School) Head Mistress Educators Primary School Qasimabad District Hyderabad (Mid market private school) Librarian Gul Ursani Primary School Qasimabad District Hyderabad (Mid market private school)

Global Book Fund Country Study

PHILIPPINES

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1. Methodology

The Philippines country study was conducted in Manila by Alfonso F. de Guzman, consultant for the Results for Development Institute (R4D), over the course of October 2015 – January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

Among those consulted were 8 senior officials of the Philippine government, 3 country representatives of multilateral and bilateral donor agencies, 7 publishers and 4 printers of children’s books, and 5 others, including leaders of non-governmental organizations (NGOs),¹³⁸ a project implementation contractor, the president of an industry association, and the head of a graduate school of management. A complete list of interviewees is available in Appendix 1 of this document. The respondents were asked to fill out structured questionnaires; most were later interviewed. Publishers of children’s books were also asked to upload to an online inventory the publication details of individual book titles in their current catalog. Monetary values are expressed in US dollars (US\$), each equivalent to 46.50 Philippine pesos.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Education and Literacy

The Philippines, a Southeast Asian archipelago of 95 million people, is a lower middle income country with a per capita income of US\$2,210. The average life expectancy is 69 years, and the functional literacy rate of 10–64 year-old Filipinos is 86.4% (in 2008). School education is managed by the national government’s Department of Education (DepEd) organized into 17 administrative regions¹³⁹ in a system enrolling 24.0 million students (Figure 1) in 62,700 elementary and secondary schools (Figure 2).

Figure 1: Enrollment for school year 2014/2015 (millions)

Students in SY 2014/15	Public	Private	Total
Kindergarten (age 6)	1.8	0.4	2.2
Elementary Grades 1–6	13.3	1.2	14.5
Secondary Grades 7–10	6.0	1.3	7.3
Total	21.9	2.9	24.0

Source: Philippines Department of Education (DepEd) EMIS

¹³⁸ Acronyms: **DepEd**, Department of Education; **GER**, gross enrollment ratio; **K–6**, Kindergarten–Grade 6 (elementary education); **LGU**, local government unit; **LRMDS**, Learning Resources and Management Development System (of DepEd); **NAT**, National Achievement Test; **NER**, net enrollment ratio; **NGO**, non-governmental organization; **SY**, school year; **UN**, United Nations; **USAID**, United States Agency for International Development.

¹³⁹ Region I (Ilocos), northwest Luzon; CAR (Cordillera Administrative Region), upland northern Luzon; Region II (Cagayan Valley), northeast Luzon; Region III (Central Luzon); NCR (National Capital Region), Metro Manila; Region IV-A (Southern Luzon); Region IV-B (Mindoro, Romblon, Palawan islands); Region V (Bicol), southeast Luzon; Region VI (Western Visayas); Region VII (Central Visayas); Region VIII (Eastern Visayas); Region IX (Zamboanga); Region X (Northern Mindanao); Region XI (Davao); Region XII (Cotabato); Region XIII (Northeastern Mindanao); ARMM (Autonomous Region in Muslim Mindanao), Basilan–Lanao–Maguindanao–Sulu.

Figure 2: Number of schools for school year 2014/2015

Schools in SY 2014/15	Public	Private	Total
Elementary Grades K-6	38,648	10,629	49,277
Secondary Grades 7-10	7,976	5,447	13,423
Total	46,624	16,076	62,700

Source: Philippines Department of Education (DepEd) EMIS

In the school year (SY) June 2014–March 2015, the elementary school Gross Enrollment Ratio (GER) was 109%, meaning that some children in school were either over- or under-aged. For that same year, the Net Enrollment Ratio (NER) was 93%. In secondary schools GER was 84% and NER 63%.¹⁴⁰

While enrollment is high, reading and language achievement is low. Average scores in the National Achievement Test (NAT) for Grade 3 of elementary school (when children are about 10 years old) show declines in reading comprehension and in grammar both in English and in Filipino, the national language, as seen in Figure 3.

Figure 3: Reading comprehension and grammar in English and Filipino

English	SY 2009/10	SY 2011/12
Reading comprehension	61.7	54.4
Grammar	61.9	57.2
Filipino		
Reading comprehension	61.3	58.6
Grammar	63.9	57.0

Source: The World Bank

In January 2013, after years of scholarly research, official consultation, and political debate, the Philippine government made two major changes in school education. First, the structure of basic education changed from a 10-year system (six years of elementary plus four years of high school) to a 13-year system (Kindergarten, elementary Grades 1–6, secondary Grades 7–10, and Senior High School or Grades 11–12). Second, the language of instruction (LOI) changed from bilingual (English and Filipino) to literacy instruction in the mother tongue in early grades.

The three extra grades (Kindergarten and Grades 11–12) were added to align the country's basic education system with the 12-grade systems of the world. Introducing the mother tongue in initial literacy was a concession to mounting evidence that children learn to read earlier and more effectively in their own language. It was also a recognition of the country's linguistic diversity and a necessary move to keep some restive regions within the body politic. Also in 2013, DepEd declared a moratorium on the purchase of reading books for public schools. These government actions are having serious impacts on educational publishing, both of textbooks and of reading books.

¹⁴⁰ GER: the ratio of the number of children in school to the total number of school-age children; NER: the ratio of the number of children of the right age at each grade level to the total number of children enrolled at each grade level.

2.2 Language of Instruction (LOI) Policy

The Philippines has eight major languages spoken by close to 90% of the population. The country, having been an American colony from 1898 to 1946, uses English as the language of higher education, commerce, government, and the media. Tagalog, spoken natively by 35% of the population, was declared the basis for developing the national language in 1937; in 1987, Filipino was adopted as the national language.¹⁴¹ Required to be taught in school and promoted in motion pictures, print and broadcast media, Filipino is now spoken by 45% more Filipinos as their second language. For many years, a bilingual education policy required school instruction in English for mathematics and science and in Filipino for social studies. Following years of sometimes divisive political debate, in 2013 the government adopted a new curriculum for Kindergarten and Grade 1 instruction in 19 mother tongues,¹⁴² transitioning to Filipino and English during Grades 2 and 3 and continuing with bilingual instruction in Grades 4–6 of elementary education and in the following years of secondary education.

3. Current Print and Digital Reading Book Provision

The supply of reading books is generally low in school and likely lower at home. With 78% of the country's 49,277 elementary schools in 2014, DepEd is the major consumer of reading books. The main producers number about a dozen book publishers, many with active backlists in the hundreds of titles.

However, as noted earlier, purchases of reading books have been frozen because DepEd is reviewing national policies and procurement procedures in the provision of reading books to public schools. Without government orders, book publishers turn to the smaller market of 10,629 private elementary schools,

public libraries, and the general public. Orders from private schools are low, as school administrators and parents prioritize the purchase of textbooks over reading books. Consequently, the publisher's initial printing of a new children's book is a conservative 1,000 copies. At this scale, unit costs are high, so reading books for children are priced high, typically US\$2.00 for a short, small book printed in color.¹⁴³

The new DepEd curriculum prescribing initial literacy instruction in the mother tongue poses a big challenge to publishers of both paper and digital learning materials, and they will need assistance to be able to respond effectively. This challenge creates opportunities for publishers to: (i) expand their capacity to generate materials; (ii) increase their print runs to break the cost limitations of the first 1,000 copies; and (iii) extend their sales, stock, and service outreach beyond the primate city of Manila.

4. Country Findings and Market Gaps

4.1 Publishing

Book publishers' wide array of reading materials can be seen in the variety advertised in their catalogues. These include short books for children of various ages, mostly in Filipino and English, fiction and nonfiction, picture, puzzle, and chapter books, local editions of popular international children's classics, and new as well as traditional Filipino folktales and stories for children. Designed to attract and retain young people's short attention span, the books are 32 pages in extent, set in legible and readable type, well-illustrated, printed in color on wood-free or part-mechanical paper, and wire-stitched on the spine. Although some publishers have many titles to sell, the annual sales turnover is modest, from US\$1.1 million to US\$6.4 million. In contrast, one textbook publisher's turnover is US\$67.0 million. The snapshot

¹⁴¹ Tagalog, the language on which the national language, Filipino, is based and the language of metropolitan Manila, is spoken by about 35% of all households (2000 data). The other major languages are Cebuano, spoken by 24% of households; Ilocano, 9%; Hiligaynon (Ilonggo), 7%; Bicolano, 5%; Waray, 3%; Pampangan, 2%; Pangasinan, 2%; other languages, 13%.

¹⁴² In addition to the eight major languages listed in the previous note, 11 other languages are designated for instruction in the mother tongue, as follows: Aklanon, Bahasa Sug, Chabacano, Ibanag, Ivatan, Kiniray-a, Magindanaoan, Meranao, Sambal, Surigaonon, and Yakan.

¹⁴³ The influence of printing quantities on publisher pricing is shown in 4.5 (Financing), below.

Figure 4: Profiles of publishing houses offering Filipino titles

Publisher	Titles in Catalogue	Notable Features
Lampara Books (Established 2001)	345	Filipino language books include traditional fables, folktales, fiction for young readers (207 titles). Illustrated stories for children in English, international classics, popular fairy tales (138).
Adarna House (1980)	241	Mostly original fiction, mostly in Filipino language. Big books and activity books for ages 0–3 (80 titles); story books for young readers (125); readers, references, poetry for older children (36). Many titles also in electronic format.
Vibal Publishing (1953)	175	Beginning reading (22 titles); mother tongue (12); biography of successful business people (6); themes of love of country, family, others, service, self (87). Many titles also in electronic format.
Anvil Publishing (1990)	153	Trade book division of national bookselling company. Books for young readers, mostly fiction in Filipino and English (69 titles); books for teens (84 titles).
OMF Literature (1957)	119	Many titles bilingual English–Filipino. Preschool (21 titles), young readers (13), health-themed (47), faith-themed (38).
Tahanan Books (1992)	98	Many titles in parallel volumes, English and Filipino. Picture books (9 titles); reference, anthology, biography, science (36); myths and folktales (12), story books (48).

Note: The publishers' offerings are preponderantly in Filipino and English (up to very recently the languages of instruction in schools). The offerings also reveal a near absence of titles in the other Philippine languages, a troubling sign of coming crisis in the provision of reading materials, as selected mother tongues have already been mandated as languages of instruction in initial literacy.

of six publishing houses shown in Figure 4 illustrates the varied catalogue offerings in children's books. (In an inventory undertaken in the country as part of this study, a number of publishers uploaded their catalogs onto an electronic database.)

The origins of each publisher are also varied. Some are established textbook publishing houses which have built up their reading titles from many years' experience with and profits from the textbook trade. One is owned by a literary family that invests in children's fiction, printing in low quantities, their backlist of low-volume sales now accumulating to sustainable levels. Another, a relatively recent entrant in the industry, is growing quickly by frequent publication of short and fast-selling teen romances—business that supports the search for serious authors of children's fiction, sometimes scouting them from among literary contest winners. Still another is a faith-based enterprise, with the parent church

subsidizing publications for children to keep selling prices within reach of families, at US\$1.50 equivalent.

To survive, publishers of children's books need the government. The government (principally DepEd and the National Book Development Board) is the publishing industry's biggest customer and also provides incentives in the form of literary contests and awards as well as tax exemptions on paper importation. Until 2012, DepEd's Library Hub Project bought up to 1,250 copies each of about 300 titles per year. Using provincial, municipal, or city budgets, local government units (LGUs) also purchase reading books for public libraries and some school libraries. When the government orders in bulk, publishers are able to break the cost limitations of the first printing of 1,000 copies, offer better list prices and greater discounts to book jobbers and bookstores, and minimize stocking unsold or slow-moving inventories.

After many years of educational publishing in English and Filipino, publishers are now gearing up to comply with the new policy on language of instruction for teaching in the mother tongue in the early grades. No government orders for textbooks or supplementary reading books have yet been placed, as DepEd is trying out the curriculum, supported during this process by self-generated learning modules. The new curriculum is creating an enormous demand for the supply of learning materials to the country's public and private elementary schools. Publishers of textbooks and reading books await DepEd's call for books, promised for late 2015 or early 2016.

4.2 Printing

Ordered by publishers in quantities from 1,000 to 5,000 copies, reading books are printed and bound in small and medium-sized commercial printing plants in Manila where the publishers are located. Commercial printing is also available in the larger provincial cities in central and southern Philippines. The larger plants are equipped with sheet-fed offset presses to print on 25"x38" paper for book formats of 5.5"x8.5" or 8.5"x11" or 30"x42" paper for the book format 7"x10". High-volume, roll-fed "web" presses print newspapers, magazines, telephone directories, and textbooks in hundred-thousand- or million-copy runs.

Adequately equipped and staffed, Philippine printers readily meet the local demand for printing. To international markets, however, they exported only US\$14.1 million worth of business, or 0.12% of the world's US\$12.2 billion total exports of printed matter in 2013.¹⁴⁴ According to the Philippine Printing Technical Foundation, local printers rarely win in international competitive bidding because almost all of their paper is imported, and the government levies tax and duty on the importation.

This tropical country is not endowed with forests of softwoods, the pulp of which is used for papermaking. Hence, printing papers for books are imported,

except for a quantity of newsprint made locally from hardwood pulp and used for consumable children's workbooks and some textbooks. All printing equipment, materials, and software are imported. Printers report paying import taxes and duties of up to 17.5% of value, as follows: value-added tax, 12%; duty, 3%, miscellaneous fees, 2.5%. Government waivers of these impositions are available, but the documentation, bonds, and processing requirements, including a volume threshold (24 metric tons or one 20-foot container), can be met by only large printers of textbooks, not of reading books. In contrast, the finished books of international printing competitors (some are dedicated, industrial printers operating in duty-free export processing zones) enter the country tax- and duty-free, under the UN Protocol on the Free Flow of Information.

A textbook printer estimates that changing from a typical paper specification (60-lb matte book paper) to a slightly better grade of paper (70-lb matte book paper) will raise the cost by about 5% but will also increase the physical life of a typical book from five years to eight years. Printers' other cost differentials by color for 5,000 copies of a 32-page children's reading book are as follows:

2. From 1-color to 2-color printing—From 8% to 20% additional
3. From 2-color to 4-color printing—From 15% to 40% additional

For reading books, current market demand is for all pages of the book to be printed in full color. To meet this demand at low print runs, local printers incur costs, reported in percentage ranges as follows: pre-press preparation, 2%–4%; materials and manufacturing, 78%–83%; and overhead (including profit), 13%–20%.

¹⁴⁴ All ASEAN countries combined for US\$366.5 million in printing exports or 3.01% of the world's total, according to the government's Bureau of Export Trade Promotion, cited in Philippine Printing Technical Foundation 2014.

4.3 Procurement

The Philippine government has made several policy shifts in procurement, largely of textbooks for public schools. Up to the mid-1970s, the procurement of textbooks for public schools followed the American practice of state evaluation and adoption of books developed and sold by publishers in the private sector. From the mid-70s to the mid-80s, with financing from the World Bank, government policy shifted to origination of textbook content only by the government, international competitive bidding for printing, and national competitive bidding for distribution of the textbooks, workbooks, and teachers' guides. For a brief period from the mid-80s to the early 90s, the procurement of textbooks was decentralized to DepEd's regional offices which purchased textbooks from publishers in the private sector. Sometime in the early 90s, the procurement of textbooks and book reprinting services was recentralized but conducted competitively.

The country's procurement law prescribes national competitive bidding for most contracting by the government. When multilateral funds are involved, the multilateral agency's procurement guidelines supersede national law and prescribe international competitive bidding for high-volume printing, usually of textbooks. Both national and international procurement methods are characterized by complex documentation, submission of bid, performance and guarantee bonds, elaborate evaluation and contracting procedures, and cycles which take many months to complete. Government documents for national and international tenders prescribe specifications, disclose criteria for evaluating bid offers, and specify procedures for contracting, delivery, inspection, and payment.

Book publishers fill government orders for textbooks specified for least cost (one- or two-color printing on part-mechanical paper) for delivery to public

schools. These books are estimated to last three years under conditions of normal use in the classroom. The same publishers also supply reading books to the government (the Library Hub Project) as well as to private schools and the general public (mainly families of children attending private schools) at higher quality standards (full-color printing on wood-free paper). These books are designed for a physical book life of about five years.

Overall, in book provision to public schools, there is room for more expeditious ways of selecting and delivering reading books to children, closer to the way that industrial sponsors buy books in bulk at great discounts.

4.4 Distribution

Book distribution is a challenge in this archipelago of frequent typhoons, perilous inter-island sea crossings, bad roads, and remote village schools. As in history, Manila continues to be the country's primate city, from where commerce, power, goods and services radiate out to the provinces. Publishers of children's books are based in this metropolitan capital and deliver directly to schools and to NGO buyers, charitable foundations, and industry sponsors. Publishers offer discounts of 25% off list price on sales to government agencies, schools, or booksellers and as much as 40% on sales to wholesalers or jobbers who will assume the risk of transporting the books to sell them in provincial marketplaces. The one privately owned chain of bookstores is Manila-based and operates stores only in major provincial cities. Shops in cities and towns sell mostly stationery and school supplies, popular magazines, sometimes textbooks, and some reading books.

In the public sector, DepEd book purchases are made through public bidding. The bid usually requires the supplier to deliver to specified destinations, usually DepEd division offices,¹⁴⁵ or to specific schools.

¹⁴⁵ A DepEd division, headed by a Superintendent of Schools, is the administrative level between the regional office headed by a Regional Director of Education and district offices headed by District Supervisors.

Contracted publishers' deliveries to government destinations are carried out by the publishers' own vehicles or by freight forwarders to schools or to DepEd division offices located in cities or larger towns in the provinces. The onward distribution to schools depends on the availability of transportation funds allocated from central DepEd or from LGUs or raised through community initiative.

In the years 2002–2007, DepEd partnered with many civil society organizations, including election poll watchers and the Boy Scouts, whose members volunteered to witness textbook deliveries to schools. This multiyear effort succeeded in reducing textbook losses in transit. It also provided positive feedback that books in the right quantities arrived at their intended destination within an acceptable time period. DepEd attempted to institutionalize the practice in the regions, but the effort could not be sustained, as official attention was drawn to new and more pressing educational issues.¹⁴⁶

The book retailing business has not flourished in the Philippines. This is due to a number of factors including Manila's dominance in commerce, private publishers' practice of dispatching orders directly to buyers, and the government's practice of including delivery services in book purchase contracts. Without local bookstores, it would be difficult to sustain a reliable and continuous supply of textbooks and reading books in locations close enough for browsing by teachers, school children, and the general public.

It must be noted that DepEd policy is to provide fee-free textbooks to children in public elementary and secondary schools. Textbooks are to be issued to the student for use during the school year, and returned at school closing. Library books, including books from the Library Hub, are covered by the same policy. Allowing children to take books home varies

by local education regulation. Although textbooks are provided at no cost to public school children, the lack of local booksellers or consignee-retailers at local stores makes it nearly impossible for schools to purchase additional copies using funds generated by the school community or provided by the LGU or for parents to replace school-issued books lost by their children. Without bookstores, parents, teachers, and students have no information on what textbooks or other books are forthcoming, currently available, out of stock, or no longer in print. They also have no sense of choice or opportunity to sample, as their contact with books is limited to those chosen for and delivered to them from a central source.

4.5 Financing

In government, the DepEd budget in 2015 for textbooks and other instructional materials was US\$74.4 million equivalent. A bilateral project (USAID's flagship Basa Pilipinas) has contributed an additional US\$4.0 million in teachers' guides, read-aloud books, leveled readers, and reading books in the two regions where the project operates.¹⁴⁷ For 2016, DepEd will request a 20% increase to US\$89.9 million for textbooks and other instructional materials. Aside from the small foreign contribution from Basa Pilipinas, the government's book budget is financed entirely out of Philippine government funds.¹⁴⁸ Using locally generated funds, LGUs also allocate for books, but records and amounts are not readily available for national-level aggregation. Nonetheless, what is clear is that since 2013, no government funds have been used to purchase reading books.

Without government orders, publishers of children's books in the private sector can only order low quantities from their printer, making unit manufacturing costs high (up to 30% of list or retail price). A simplified breakdown of the publishers' cost structure is shown

¹⁴⁶ DepEd's Operation Book Count is described and analyzed in R. Majeed, "Promoting Accountability, Monitoring Services: Textbook Procurement and Delivery, Philippines, 2002–2005" (Princeton University, July 2013).

¹⁴⁷ To date, Basa Pilipinas has contributed about US\$8.3 million and provided about 5.5 million books and teaching-learning materials in project sites from 2013 to 2015. The project's final year of implementation is 2016.

¹⁴⁸ Since the close of a World Bank education project in 2012 which financed the production and distribution of 16.5 million textbooks, DepEd's annual budgets for books have been without external financing.

Figure 5: Publisher's cost structure at low and moderate volumes

Item	At 1,000 copies		At 5,000 copies	
Unit manufacturing cost (paper, printing, binding)	US\$ 0.51	30%	US\$ 0.33	20%
Discount to booksellers	0.68	40%	0.68	40%
Royalty to authors	0.09	5%	0.09	5%
Publisher's gross revenue	0.42	25%	0.60	35%
List or retail selling price	US\$ 1.70	100%	US\$ 1.70	100%

Note: At 1,000 copies, the publisher prices the book at about 3 times the cost of printing to establish a selling price acceptable to the market. The pricing accommodates discounts and royalties and (from the remaining margin of about 25%) all other costs: editorial, design, typesetting, illustration, office overhead, and taxes. At 5,000 copies, the publisher's printer can offer discounts (here estimated at a conservative 35%), enabling the publisher to price the book at about 5 times the cost of printing to arrive at the same acceptable selling price. This pricing allows all costs to be recovered and increases the publisher's gross revenue to 35%.

in Figure 5. With discounts to booksellers at 40% off list price, plant costs at 15% (design, typesetting, illustration), and overheads at 10% (which includes profit), publishers operate at high costs, narrow profit margins, and frequent cash shortages.

Publishers' cash shortages are also the result of low sales volume (unsold inventories tie up cash) and long lead times to collect on sales. Although printers extend 60 days credit to publishers, this is not enough time to accumulate cash for paying the printer if sales are slow and collection times are long. The cost of borrowing is reported as 8%. Government contracts require substantial documentation and inspection, and often have long collection times. One printer reports that it took 180 days to collect on a government printing contract.

In summary, for publishers of children's books, high costs are a consequence of low print runs to be sold to a small market comprised largely of families whose children attend private schools and the absence of a network of booksellers outside of Metro Manila and the larger provincial capitals.

4.6 Demand and Utilization

The effective utilization of instructional materials, including reading books, may be inferred from the importance DepEd places on teacher in-service training. Annual training sessions conducted over

the long school break (April–May) orient teachers on the content and intent of the new curriculum and on the effective use of textbooks, teachers' guides, and the learning modules for instruction in the mother tongue. All public school teachers and their administrators are called to mandatory training in turns by grade level. Grade 1 teachers were retrained four years ago, and 2016 will be the turn of Grade 5 teachers for training. In addition to this nationwide teacher training, some projects supported by bilateral agencies and some private-sector book publishers also conduct workshops on various instructional topics. Among these topics are classroom management, use of learning resources, and student testing and assessment.

Significant demand for reading books may be inferred from the numbers of national and local libraries and of public elementary school library book requirements discussed below.

Public libraries

The National Library of the Philippines supervises the operation of 1,396 public provincial, city, and municipal libraries which usually include a children's section. The closest library to children should be the library in their own school, but only 6,274 (13%) of public elementary schools have libraries. Ever-increasing enrollments in public schools have necessitated appointing classroom teachers as a

priority over librarians. Library duty is assigned to one or more classroom teachers, resulting in closure of the library when the assigned teacher is in class, limiting children's access to reading materials.

Similarly, in the use of the public education budget, DepEd puts priority on supplying textbooks, the basic learning material, over reading books. The annual allocation for instructional materials is based on the estimated procurement of learning modules for mother tongue instruction, textbooks, and accompanying teachers' guides for the elementary and high school subjects prescribed by the national curriculum. The provision of reading books is a lower priority, and the amount to be made available for their purchase is estimated on the basis of projected economies (savings) in textbook purchases. In the years prior to the freeze, those estimated savings used for purchasing reading books ranged widely, from US\$0.6 million to US\$3.2 million, as the estimated priority allocation for textbooks varied from year to year.

The Library Hub Project

Early on, DepEd determined that the cost of establishing and supplying a library at each of nearly 39,000 public elementary schools (and nearly 8,000 public secondary schools) would be prohibitive. In 2005, DepEd launched the Library Hub Project, forging partnerships with LGUs, which provided physical facilities for the local Library Hub, and with NGOs and commercial companies in the private sector, which provided some support, including book purchases. DepEd provided personnel, training, and the budget for buying books and materials for the hub. DepEd centrally procured children's reading books from local publishers and sellers of international children's books. These were packaged in sets of 319 to 640 book titles in multiple copies and placed in carry-out hard plastic bins for the Library Hub. Schools within a hub's catchment area could borrow a binful of reading books for use in school for about one month. The school would take out another bin upon returning the previously borrowed bin.

Project targets were to establish a Library Hub at each of DepEd's 221 school divisions,¹⁴⁹ each hub notionally stocking about 40 reading books per public school student. Hubs also varied in size: designated small (S) if it served up to 50 schools; medium (M) for up to 200 schools; large (L) for up to 900 schools; and extra-large (XL) for more than 900 schools. Local authorities from areas where the hub is XL have requested additional hubs from DepEd to improve the hub:school ratio and provide schools better access to reading books.

DepEd provided training to Library Hub staff on basic librarianship, monitoring (including keeping track of frequency of book bin borrowing of schools), and reading promotion. Consequently, many hubs became the venue of reading-related activities for schools and school communities, including storytelling and read-aloud sessions, reading contests, teachers' and librarians' reading workshops, and hub celebrations with community participation.

From a pilot of 4 hubs, the project has expanded to 206 hubs, with brisk traffic in book bins. In the fifth year of the project, DepEd evaluated the performance of the Library Hubs. The evaluation identified operational problems, among them the lack of trained librarians as well as difficult transportation to and need for internet connectivity in remote hubs. The evaluation also revealed high demand and high use of hub reading materials, evidenced by the local officials' dividing early book deliveries so that all Library Hubs in their area had books at about the same time, the reported unauthorized sharing of books among schools, and community ownership of hub operations, as local public officials participated in reading activities in schools and private contributions purchased more books for the hubs. The impact of the Library Hub Project was seen in: (i) improvement of children's mean scores in NAT and in the Internal Reading Inventory and (ii) a decline in the number of nonreaders.¹⁵⁰ In 10 years of implementation, about 4 million copies of 2,700 various titles of reading books were provided to the hubs.

¹⁴⁹ In each of the country's administrative regions, school divisions, usually comprising a chartered city or a province of the region, are organized into districts, each district with 50–900 or more public elementary and secondary schools.

¹⁵⁰ Department of Education. (2009). Monitoring and Evaluation Report in Search of the Most Functional among the Batch 1 Library Hubs. Pasig City, Philippines.

Figure 6: Library Hub data by region

Administrative Region	Library Hubs	Schools per Hub	Students per Hub
IX—Zamboanga (Southwestern Mindanao)	2	1,052	328,085
ARMM—Muslim Mindanao	2	1,078	317,971
XI—Davao (Southeastern Mindanao)	5	326	159,162
XII—Cotabato (South Central Mindanao)	5	343	149,551
I—Ilocos (Northwestern Luzon)	5	479	145,168
NCR—National Capital (Metro Manila)	11	47	124,896
VIII—Eastern Visayas	8	454	98,121
VII—Central Visayas	13	226	90,817
III—Central Luzon	17	176	90,067
IV-A—Southern Luzon	22	124	84,878
VI—Western Visayas	17	200	70,441
V—Bicol (Southeastern Luzon)	17	185	64,706
XIII—Northeastern Mindanao	9	182	51,667
X—Northern Mindanao	21	100	36,276
CAR—Cordillera (North Central Luzon)	9	170	27,245
IV-B—Mindoro, Romblon, Palawan Islands	21	88	25,632
II—Cagayan Valley (Northeastern Luzon)	22	100	23,161

Note: Only public schools and enrollments are included in this tabulation.

Sources: DepEd Library Hub Project 2015 bulletin, and DepEd Office of Planning SY 2014–2015 data

As of late 2015, the project was close to 95% of its target of establishing a Library Hub in each DepEd school division. Figure 6 shows the number of Library Hubs established in each region and, for each hub, the average number of elementary schools and the average number of school children served.

The regions farthest from Manila are least served. Ilocos in the extreme north of the country and Mindanao in the far south have the fewest hubs and significantly higher school and student:hub ratios than other regions. In these areas, education access is also difficult, living standards low, and peace and order not secure in some places. Among the regions with the highest numbers of Library Hubs established

is Northern Mindanao (Region X), where the average number of elementary schools per hub is 100 and where the average number of school children reached by the hub is a little over 36,000. This level of provision would be adequate, calculating theoretically that each school would have 7 classrooms (1 each for K–6) and each classroom would have a little over 50 children.

For DepEd to achieve the same level of provision in 13 other less well served regions, the Library Hub Project would have to double its target and establish 235 additional Library Hubs. This would require an investment of about US\$20.0 million in reading books and US\$26.0 million in infrastructure, totaling US\$46.0 million.¹⁵¹

¹⁵¹ Each new Library Hub could be supplied with 50 copies each of 450 titles of a mix of elementary-level reading books (US\$2.00), secondary-level reading books (US\$4.00), and reference books (US\$8.00). At current prices, the 22,500-copy mix of reading books would cost around US\$85,000 per hub. The cost of construction, equipment, and furniture of a typical Library Hub (under the project concept, to be contributed by the LGU or a private-sector donor) is about US\$110,000. Staff, training, and other recurrent costs to operate the Library Hub are provided by DepEd.

Meanwhile, as purchases of books remain frozen, the earliest reading books supplied to the hubs are now 10 years old, double the industry standard of a five-year physical life of reading books for children. Although the Library Hub holdings are mostly storybooks which, unlike textbooks, do not require updating, replacing worn-out copies and acquiring new titles are badly needed, but the prospect and timing of this is uncertain. Indeed, the future of Library Hub Project itself is uncertain. DepEd is exploring reviving school libraries in lieu of the hubs, the project staff has no institutional home (DepEd is currently undergoing reorganization), and funds for reading books are not specified in the DepEd budget.

4.7 Digital Relevance

Although the main reading material is still the paper book, private sector publishers also sell digitized versions of their paper textbooks and reading books. One publisher has pioneered partnering with manufacturers of electronic reading devices and marketing these to private schools with the publisher's textbook content uploaded in each device.

In the private sector, publishers see the gaps in promoting greater use of digitally delivered learning materials as (i) the affordability of devices and (ii) the training of teachers needed to accompany the device to the classroom. Publishers are able to sell digital technology only to selected private schools. Schools that can pay for the additional investment in equipment are generally in Manila or other large urban areas where parents can afford the corresponding fees. Further, publisher-provided teacher training can only proceed at the rate that schools adopt the technology.

In government, with multilateral and bilateral assistance, DepEd has established the portal Learning Resources and Management Development Systems (LRMDS), physically accessible in 31 locations. These sites allow teachers to upload materials they have developed to DepEd for quality review and disseminate them to schools in the regions with connectivity. The latter serve as satellite centers to expand coverage

to remote schools with no connectivity. At LRMDS, training is provided on the rights, duties, and responsibilities of uploaders and users with regard to the ownership and fair use of digitized intellectual property. By late 2013, about 2,800 uploads of K-12 learning materials, including those for instruction in mother tongues, had been made available to about 117,500 registered users (World Bank, 2014a). The USAID-assisted Basa Pilipinas reading project is currently uploading at LRMDS more than 180 titles developed and produced by the project, consisting of teachers' guides, leveled readers, and training videos on early grade reading, thereby providing non-project regions access to these materials.

The magnitude of the challenge in digital origination and delivery of learning materials in the public sector can be seen in DepEd's downsizing of the number of LRMDS from the original target of 150 to 32 in 2011 (one was later destroyed by typhoon). The reduction was based on operational lessons learned during piloting, which included lack of connectivity or electric power and delays in the construction of facilities and in the procurement of equipment and software. The revised target number gives priority to areas in 13 regions having no Regional Education Learning Center and in 13 divisions with low-performing schools.

5. Discussion and Opportunities for a Global Book Fund

5.1 Opportunities

Over the next five years (2016–2020) the Philippines will confront the following challenges: (i) originating reading book titles at the lower elementary grades (K–3) in the 19 mother tongues of the new literacy curriculum; (ii) increasing the demand for reading books, thereby reducing unit costs and selling prices; and (iii) expanding bookselling in order to sustain the resupply of textbooks and other instructional materials, including supplementary reading books, over the longer term. Each is briefly discussed below.

Developing content for mother tongue books

In 2013, when the new elementary education curriculum was introduced requiring instruction in the 19 mother tongues, there were little or no instructional materials available in those languages. To provide the needed materials, DepEd generated content from its LRMDs in various locations and instructed school authorities in the localities where the mother tongue would be the language of instruction to gather materials from their respective communities. DepEd printed a selection of those materials for use in schools while the new curriculum underwent trial and revision.

DepEd plans to issue calls to publishers for textbooks and teachers' guides compliant with the new curriculum to be supplied to schools for the school year opening in June 2017. One would assume that a profitable textbook trade would provide publishers the resources with which to invest in authors and illustrators of reading books in mother tongues for publication. This, in turn, would yield significant numbers of new materials in the designated languages of instruction and complement those generated by the government (in DepEd's LRMDs), donor-funded projects (USAID's Basa Pilipinas, the World Bank's LEAPS project), and NGOs (Save the Children).

However, the reality is that currently, textbook publishers do not have stock of basic materials for developing publications in the mother tongues. For their part, children's book publishers do not have the capacity to undertake gathering materials in so many linguistic communities and on a scale required by the curriculum.¹⁵² DepEd authorities believe that learning materials should reflect familiar elements in the child's home, community, and general environment. This makes the demand for materials more acute, as original and locally generated material will be preferred over translation or adaptation of similar

but foreign material. This serious gap in content generation cannot be filled by either DepEd or book publishers using their own limited financial and technical resources.

Original materials so far generated include reading materials developed by NGO-facilitated teams of local villagers and lesson units contributed by teachers shared locally by uploading them at DepEd LRMDs locations. According to one small-scale NGO operation, gathering original material from the linguistic community takes about two months, and transforming the basic material through iterative consultations with a work group from the community into a manuscript for publication takes another six months. No estimate has yet been made of the extent and cost of field research needed to gather material in the 19 mother tongues. This type of basic research is currently not within the cost structure of children's book publishers. Adding this on will impose a heavy financial and operational burden that publishers may not be able to bear.

A Global Book Fund could provide the financial and technical resources to support this basic research (at universities or language research institutions) and further content development (at publishing houses) to fill this origination gap.

Breaking the first thousand-copy barrier

Estimating the quantities of reading books needed in mother tongues remains problematic. With support from a multilateral donor, DepEd is in the initial stages of drawing a map of the country by language of instruction (i.e., for each of the 19 mother tongues). When completed, the map will be the basis for estimating volume orders for both textbooks as well as reading books in the mother tongues.

While the government's moratorium on reading books is in force, publishers can sell their children's

¹⁵² While some international NGOs generate literacy materials in mother tongues, their operations are small, cover only some of the mother tongues of the new curriculum, and rely on book publishers for publications services, including specification-setting, book design and illustration, page make-up and proofing, production editing and proofreading, and press follow-up. The implementation contractor of the USAID-supported reading project purchases reading books in English and Filipino from children's book publishers and supports the publishers' translation of some titles to the two mother tongues (Ilocano and Cebuano) of their project schools and communities. Although useful, curriculum developers and teachers in the field are requesting original materials in their children's own languages and from their own cultural communities.

books only to private schools, libraries, and the general public. The orders from this market are small, keeping publishers in the low-print-run, high-unit-cost trap. It is not known when the moratorium will be lifted. (A possible offer could be made to the government that in return for lifting the moratorium, the stock of reading books at Library Hubs and the number of Library Hubs themselves would be doubled from their current levels.)

Resuming the supply of reading books to the Library Hubs and raising their holdings will result in order quantities sufficient to break the publishers out of their first-thousand-copy trap. In the years that DepEd purchased reading books for the hubs, a typical order was for 1,250 copies of each title to resupply 25 hubs per year.

*A Global Book Fund could finance these incremental purchases to increase Library Hub holdings. It could also broker public-private partnerships for the construction of more Library Hub facilities.*¹⁵³

Supporting local booksellers

Restoring the DepEd budget for reading books will also restore purchases by LGUs for their Library Hubs as well as for provincial, city, and municipal libraries.¹⁵⁴ This local demand will create bookselling opportunities for local stores currently carrying only popular magazines and school and office supplies. Further, whether future DepEd policy adopts the school library or the Library Hub concept for implementation, the need to continually resupply reading books for local public libraries, school libraries, and Library Hubs could expand bookselling beyond major urban areas to smaller provincial cities and towns.

As large volume orders make more reading books available over the long term, the government (especially the regulatory National Book Development Board) in dialogue with industry (especially the Philippine Educational Publishers Association,

Philippine Printing Technical Foundation, and the Booksellers Association of the Philippines) will need to formulate a national strategy to sustain the supply and resupply needs of schools, libraries, and families throughout the Philippines through local bookselling.

A Global Book Fund could foster this national public-private partnership.

5.2 Risks

With regard to the possible operation of a Global Book Fund, the attitude of international development partners and program implementers in government as well as of publishers, printers, and other stakeholders in the private sector was very positive. Members of high government leadership, however, were ambivalent. DepEd undersecretaries and other officials identified the serious gaps where assistance was needed in the provision of reading materials. These gaps included content origination and distribution. One official even suggested that a high-level group representing government and the private sector could be the institutional model for the in-country operation of a prospective fund. However, the Secretary of Education did not seem convinced that an external fund would add value to DepEd's present program. In his view, the government's policy and budgetary provisions have been sufficient. He was, however, open to proposals on how a Global Book Fund could help and recognized that additional resources could increase the number of titles and copies available in schools and libraries.

As it is the government driving the demand for textbooks in the mother tongue, it is also the government that replenishes the holdings of the Library Hubs. Ultimately, to make reading books more available to Filipino children, it is crucial for a Global Book Fund to make a convincing business case in a future dialogue with the government.

¹⁵³ The financing could phase itself out as the government assumes a progressively greater share of financing over an agreed period.

¹⁵⁴ Although funded from local government budgets (and not from central DepEd), LGU purchases of reading books are also currently frozen, because the co-chair of the Local School Board with authority to purchase reading books is the Division Superintendent or the District Supervisor, who are national DepEd officials bound by the DepEd moratorium.

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7. Appendix 1: Interview List

Organization Type	Contact	Position	Organization
Government Officials	Armin A. Lustro	Secretary	Department of Education (DepEd)
	Dina S. Ocampo	Undersecretary, Programs & Projects	DepEd
	Mario A. Deriquito	Undersecretary, Partnerships & External Linkages	DepEd
	Marieta C. Atienza	In-Charge, EMIS Division	DepEd
	Edel B. Carag	In-Charge, Instructional Materials Council Secretariat	DepEd
	Beverly Gonda-Berame	Project Officer, Library Hub Project	DepEd
	Graciela M. Cayton	Executive Director	National Book Development Board
	Sharisse Lim	Liaison Librarian	National Library of the Philippines
Donors	Samer Al-Samaral	Senior Economist	World Bank – Philippines
	Brian S. Levey	Director of Education	USAID Philippines
	Lynette C. Perez	Education Specialist	Asian Development Bank
Children's Book Publishers	Ani Rosa S. Almario	Vice President	Adarna House
	Sam D. Baltazar	General Manager for Publishing	Rex Book Store
	Karina A. Bolasco	Assistant General Manager	Anvil Publishing
	Kristine Mandigma	Chief Operating Officer	Vibal Group
	Segundo Matias, Jr	President	Lampara Publishing House
	Frances Ong	Managing Editor	Tahanan Books
	Yna S. Reyes	Publications Director	OMF Literature
Printers	John S. Bellen	Vice President, Printing & Digital Imaging	Vibal Group
	Benito J. Brizuela	Chairman	Book Media Press
	Timothy I. Buhain	Chief Operating Officer	Rex Printing
	Joey A. San Juan	Vice President, Sales & Marketing	The House Printers
Implementers	Abigail C. Castillo	Book Development Program Officer	Save the Children (Philippines)
	Marcial A. Salvatierra	Chief of Party, USAID Basa Pilipinas Reading Development Project	Basa Pilipinas, Education Development Center
Other Stakeholders	Dominador D. Buhain	President Emeritus	Philippine Educational Publishers Association
	Juan Miguel M. Luz	Head, Stephen Zuellig Graduate School of Development Management	Asian Institute of Management
	Tarie Sabido	Chair	Philippine Board on Books for Young People

Global Book Fund Country Study

RWANDA

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1. Methodology

The Rwanda country study was conducted by Marcienne Umubyeyi, consultant for International Education Partners (IEP), over the course of October 2015 – January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

The country background and context research for this study was conducted in the UK by IEP. IEP has considerable previous in-country experience of curriculum and teaching and learning materials (TLM) issues in Rwanda through its work funded successively by UK Department of International Development (DFID), UNICEF, US Agency for International Development (USAID), the World Bank, and Belgian Technical Cooperation (BTC) from 2000–2004 and from 2007 up to the present on the successful TLM reform program. IEP has collected a wide range of relevant documentation and reports on all aspects of local language policies and TLM provision for primary schools in Rwanda via desk research, its previous and current work in the country, and through donor recommendations and suggestions. A number of in-country book chain stakeholders were consulted; a complete list of in-country interviews is available in Appendix 1 of this document.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background and Education System

Rwanda has been an independent country since 1962. After the civil war in the 1990s, the Government of National Unity, led by the Rwandan Patriotic Front (RFP), was formed. In November 2009, Rwanda became a member of the Commonwealth.¹⁵⁵

Rwanda is a small, landlocked country with a geographic area of 23,338km² divided into regions and districts as shown in Figure 1.¹⁵⁶ Each district is further divided for administrative purposes into sectors and each sector into cells. There is a District Education Officer (DEO) in each district, and most sectors now have a Sector Education Officer (SEO).

The current population is estimated at 12.66 million with an average annual growth rate of 2.58%.¹⁵⁷ Rwanda has a young population, with 42% below the age of

Figure 1: Administrative Map of Rwanda



¹⁵⁵ CIA. (2015). World Factbook.

¹⁵⁶ Ibid.

¹⁵⁷ Ibid.

14 and a further 19% below the age of 25. The rural/urban population split is 28% urban and 72% rural.¹⁵⁸ According to the World Bank, Rwanda's annual national gross per capita income was approximately US\$700 in 2014.¹⁵⁹ This categorizes the country as a low income country with a 2014 world human development index ranking of 163.¹⁶⁰ The current literacy rate (as defined by the CIA World Factbook *as age 15 and over who can read and write a recognized language*) is 70.5%, broken down into 73.2% male literacy and 68% female literacy.¹⁶¹

The education system currently comprises 3 years of pre-school, 6 years of primary, and 6 years of secondary divided into 3 years of lower secondary up to "O" level and 3 years of senior secondary leading to "A" level examinations. Grade level enrollment data shown in Figure 2 was sourced from a specially designed online TLM Management Information System. This system was designed and installed in 2009 specifically to provide the Rwanda Education Board (REB) with the easily accessible and up-to-date planning and management information needed to deliver all required TLMs to all schools.

REB has developed a new competence-based curriculum which is planned to launch in 2016. During 2015, a major call for bid submissions from local, regional, and international publishing houses was issued for all subjects and grade levels for all pre-school, primary, and secondary grades from local and regional publishing houses. The call for bid submissions covered textbooks and teachers' guides, reading books in Kinyarwanda, English, Kiswahili, and French, and a range of other supplementary materials comprising bilingual dictionaries, word books, atlases, flash cards, picture books, big books, grammar books, anthologies, and literature set books for secondary examinations.

Rwanda previously conducted successful TLM bids in 2009 and 2012 as part of its TLM reform program and now has cadres of experienced bid managers and subject

Figure 2: School Enrollments by grade level (2015)

Grade	TOTAL	BOYS	GIRLS
N1	64,873	30,882	33,991
N2	30,477	19,596	10,881
N3	62,034	35,908	26,126
P1	628,784	321,155	307,629
P2	510,266	257,846	252,420
P3	575,818	208,779	367,039
P4	355,479	172,377	183,102
P5	306,697	147,818	158,879
P6	174,057	81,063	92,994
S1	183,871	90,025	93,846
S2	168,649	49,427	119,222
S3	79,270	37,509	41,761
S4	56,522	26,987	29,535
S5	52,717	25,427	27,290
S6	47,965	23,467	24,498
Total	3,297,479	1,528,266	1,769,213

Source: MOE TLM MIS

and grade level evaluators familiar with the rigorous evaluation criteria and evaluation system. Submitting publishers have previously expressed their satisfaction with the transparency, fairness, and efficiency of the Rwanda bidding and evaluation procedures. The current bid evaluation exercise was scheduled to be completed in December 2015 for introduction of approved titles into schools in April 2016.

2.2 Country Language Profile

Rwandans are drawn from one homogenous cultural and linguistic group, the Banyarwanda. The great majority of Rwandans speak Kinyarwanda as their mother tongue, which is closely related to and mutually comprehensible with Kinyarundi, the mother tongue language of neighboring Burundi. It

¹⁵⁸ Ibid.

¹⁵⁹ World Bank. (2016). Data—Rwanda. Retrieved from <http://data.worldbank.org/country/rwanda>

¹⁶⁰ UNDP. (2015). Human Development Report 2015. Retrieved from http://hdr.undp.org/sites/default/files/2015_human_development_report.pdf

¹⁶¹ CIA. (2015). World Factbook.

has links also with some of the minority languages in the southwest of Uganda. Thus, unlike many other sub-Saharan African (SSA) countries, Rwanda is predominantly monolingual. English and French are official languages alongside Kinyarwanda, and Kiswahili has become more common after 1994 as a quite widely used commercial language.¹⁶²

2.3 Language of Instruction (LOI) Policy

Kinyarwanda is the Language of Instruction (LOI) for pre-schools and P1–3. From P4 to S6, English is the LOI. Kinyarwanda is taught as a curriculum subject up to grade P6, and English is taught as a curriculum subject starting in P1. Kiswahili is a mandatory subject in secondary education, and French is a curriculum elective option at secondary.¹⁶³ The early exit LOI policy, which requires that English replaces Kinyarwanda as the LOI in P4, means that there is a strong policy requirement for the rapid development of English language skills in P1–P3 as preparation for the use of English as the LOI from P4. This runs in parallel, and perhaps in conflict with, the requirement to develop early literacy skills in Kinyarwanda. The situation is complicated by recent research undertaken by the British Council which suggests that up to 70% of primary school teachers have inadequate English skills to deliver an upper primary curriculum in English. Other research undertaken by Professor John Clegg on behalf of the British Council raises substantial doubts about the readability, for both teachers and students, of the primary level English language textbooks for P4–P6 developed for the previous curriculum.¹⁶⁴

Clegg's research recommended that English language textbooks for P4–6 should be bilingual to compensate for sub-standard English language skills, but this was rejected by the REB. However, the issue of readability was taken seriously enough by the REB that the evaluation methodology for the 2015 TLM bid included, for the first time anywhere in SSA, a

readability evaluation criterion for which specific readability assessment questions and training had to be developed for the TLM evaluators.

3. Current Print and Digital Reading Book Provision

3.1 Print Materials

The Teaching and Learning Materials Management Information System (TLM MIS) was designed specifically to support the procurement and delivery system for TLMs. It contains data on every school, with grade level roll numbers updated annually by districts. Most schools on the database now have accurate GPS coordinates, which means that the Ministry of Education (MOE) can now map school distribution nationally. It contains the complete list of approved titles organized by grade levels with prices. It maintains a complete list of all TLMs successfully supplied annually to every school so that school inspections can check easily on school loss and damage rates. It provides school target supply ratios so that the MOE can check on the levels of TLM stock in every school against its targets, and it enables underperforming schools to be identified and corrective action to be taken.

Based on MOE targets and school stocks it will forecast stock and budget requirements 5–10 years ahead to ensure that the Government of Rwanda (GOR) is providing sufficient funds to achieve and maintain its TLM supply targets. The table below specifies the TLM units ordered by and successfully delivered to all Rwandan schools from 2010 to 2013 for both textbook and supplementary materials orders. There were no TLM budgets or orders in 2014 and 2015 in preparation for the launch of the new curriculum with a new generation of TLMs designed to support new curriculum requirements.

¹⁶² Ibid.

¹⁶³ New competency-based Rwanda curriculum, 2015.

¹⁶⁴ Clegg, J. (2013). Providing Language Support in CLIL.

Figure 3: Textbook and supplementary materials orders/deliveries for 2010–2013 (Unit: millions of books)

Year	Textbooks Ordered (Delivered)	Supplementary Materials Ordered (Delivered)	Total Books Ordered (Delivered)
2010	2.90 (2.97)	0.57 (0.57)	3.47 (3.54)
2011	1.12 (1.12)	0.22 (0.22)	1.34 (1.34)
2012	1.58 (1.58)	0.64 (0.64)	2.23 (2.23)
2013	1.20 (1.19)	0.41 (0.41)	1.61 (1.59)
Total	6.81 (6.85)	1.84 (1.84)	8.65 (8.70)

Source: MOE TLM MIS

Figure 3 indicates that 6,806,577 textbooks and teachers' guides were ordered by schools in the 4-year period and that 6,854,351 units were successfully delivered to schools. The fact that more were delivered than ordered is attributed to cheaper substitutions of more expensive textbooks that were not available at the time they were required, thus allowing schools to order more copies of the cheaper books. A total of 1,843,351 supplementary materials units were ordered and 1,842,704 units were successfully delivered to schools over the same period (99.9%). A high proportion of supplementary materials were primary grade reading books. In 2009, only 9 lower primary reading books in Kinyarwanda were approved and only 13 for upper primary. In 2015, there were 125 approved Kinyarwanda primary reading books for P1–6, and publishers are now seeking actively to find Kinyarwanda children's book authors and to publish more Kinyarwanda reading books in response to MOE demands stimulated by the 2012 USAID-funded call for bids.

In Rwanda, since 2009, the TLM reforms have allocated high priority to the provision of reading books which are supported by annual government funding from pre-schools to senior secondary grades. These efforts

in schools are supplemented by a national campaign called 'Rwanda Reads.' Organized by the Ministry of Education, it is aimed at encouraging parents to support children's reading. In this campaign, Rwanda's evidence base lies in the importance of access to reading books at home, which has been underlined by a number of research studies¹⁶⁵ noting:

“There was a positive relationship between students' reading achievement at the fourth grade and parents having engaged their children in early literacy activities before starting school (e.g., reading books, telling stories, singing songs, playing with alphabet toys, and playing word games). The presence of children's books in the home also continued to show a strong positive relationship with reading achievement. The average reading achievement difference between students from homes with many children's books (more than 100) and those from homes with few children's books (10 or fewer) was very large (91 score points, almost 1 standard deviation) for most students, textbooks were the foundation of reading instruction, supplemented by other materials.”

Access to stimulating collections of attractive and relevant reading books—even though the collections

¹⁶⁵ Mullis, V. S. (2006). *IEA's Progress in International Literacy Study in 40 Countries*. Boston, MA : PIRLS.

may be small—is considered by research and the MOE to be an important determining factor in the achievement of early literacy. Early literacy is in turn a key determinant of student achievement in succeeding grades. In Rwanda, as in many SSA countries, very few homes have any children’s reading books, and relatively few parents have the skills, resources, or time to engage actively with their children in pre-school reading support at home. This is a particular issue in rural and remote areas. Lee found that in all 14 Southern and Eastern Africa Consortium for Monitoring Educational Quality (SACMEQ) countries studied, student socio-economic status was strongly and positively associated with their literacy achievement.¹⁶⁶ In other words, poorer students had lower levels of literacy and correspondingly lower levels of overall achievement. Given this, the availability of reading books to primary school students is critical. This is particularly applicable in rural and remote areas where these materials are unlikely to be available from any other source.

Rwanda Reads is a four-year MOE initiative that aims to develop a culture of reading in Rwanda. However, the role of reading remains limited in classrooms as a result of limited pedagogic training of teachers, and many/most Rwandans have not adopted the habit of reading for pleasure or for lifelong learning.

In early 2011, the Quality Education Working Group of the REB identified the transformation of reading habits in Rwanda as a priority in the medium term. Rather than create a separate funding source to achieve this objective, the initiative aimed to pull together all partners sharing a common commitment to literacy to ensure coordination and strengthen synergies among their various activities and resources related to the development of literacy and the reading culture.

The initiative was aimed to ensure the active promotion of reading across a variety of related areas. At primary schools, children in the early grades (P1-4) would benefit from revised teacher training, more

and better reading materials, the establishment of reading standards to guide curriculum reform, and much more. Literacy instruction for adults, children of pre-primary age (ECCD), and out-of-school youth has been launched to ensure synergy between the activities of the MOE and those of other *Rwanda Reads* partners. Activities have been targeted at building the capacity of local authors, publishers, booksellers, and librarians. A nationwide public awareness-raising campaign, including story writing competitions and other activities, has been launched to instill all Rwandans with an appreciation of the importance of reading and to inspire them to adopt the reading habit. Public-private partnerships have been developed to support expanded access to mobile and community libraries in order to improve access to reading materials in rural areas. The opening of the Kigali Public Library in 2012 exemplifies the cross-sectoral collaboration for reading that the *Rwanda Reads* initiative mobilizes.¹⁶⁷

The management of this initiative is principally overseen by the chair (Dr. Joyce Musabe—REB) and co-chair (USAID education advisor). Strategic planning occurs within the Steering Committee, a small group of approximately six key partners. The *Rwanda Reads Taskforce* is composed of nearly two dozen partners including REB, DFID, UNICEF, USAID, specific non-governmental organizations (NGOs) (Education Development Center, Save the Children, Imbutu Foundation, VSO, British Council, Wellspring Foundation, etc.), Rwanda Education NGO Coordination Platform (RENCOP), three religious education associations, the Publishers and Booksellers Association (RPBA), Rwanda Association of Local Government Authorities (RALGA), and more. These meetings provide a forum for coordination among parties and the planning of various *Rwanda Reads* activities.

The *Rwanda Children’s Book Initiative* (RCBI) was a partnership between the Government of Rwanda, UKAid, and Save the Children, which began implementation in May 2013 to support publishers in

¹⁶⁶ Lee, V. E., Zuze, T. L., and Rose, K. N. (2005). School Effectiveness in 14 Sub-Saharan Countries: Links with 6th Graders’ Reading Achievement. *Studies in Educational Evaluation* 201:31.

¹⁶⁷ Rwanda Reads. (2012). About Rwanda Reads. Retrieved from <http://mineduc.gov.rw/rwandareads/spip.php?article1>

producing high-quality, age-appropriate, Kinyarwanda children's books and to distribute these books to schools while at the same time improving teachers' skills, knowledge, and confidence in the use of books in support of literacy acquisition and improved learning outcomes. The project design identified the following problems that needed to be addressed:

- ▶ **Availability:** A lack of age-appropriate, local language children's books in schools.
- ▶ **Poor supply chain:** Local publishers in Rwanda lacked the skills, knowledge, and experience to produce high-quality children's books in the Kinyarwanda language, although this did not apply to many of the regional and international publishers who are active in Rwanda.
- ▶ **Unstable demand:** Although all efforts to improve reading skills acknowledge the importance of good quality, age-appropriate, local language material, most projects take a decision to produce or procure these materials on a one-off basis rather than on a regular basis.
- ▶ **Poor management and use:** Even if material is available and meets basic quality standards, it is often not accessible within schools. Evidence also

indicates that even when appropriate, quality reading materials are available within schools, teachers don't have the skills to use them effectively.

As a result of the project, Rwandan publishers and authors received training in children's book development, and teachers in selected districts received training in the use of reading books in the classroom. 47 fiction and non-fiction Kinyarwanda language books intended for P1–3 were published by local Rwandan publishers. In terms of classroom use, schools reported that children were reading up to three books per term as a result of teacher training and sensitization, compared to no reading at all prior to the project.

3.2 Digital Education Technology

Rwanda, unlike most SSA countries, has undertaken a detailed and comprehensive audit of information and communications technology for education (ICT4E) hardware and software in the school system and has calculated the total cost of ownership (TCO) for ICT4E and is thus aware of the cost implications. Some of the data from this audit can be seen in Figure 4.

Figure 4: School infrastructure statistics, 2013¹⁶⁸

Item	Rwanda Data
% of primary schools with access to electricity	37%
% of primary schools with effective "Internet access"	13% have access but 80% of these are only access to head teacher/school admin via internet dongle (USB internet access)
Computer/student ratio	220,000 One laptop per child (OLPC) devices. P1–P6 2015 enrollment is 2,204,145. Approx. primary ratio of 1:10.
Sufficiency of operational funds for schools to support ICT4E	District offices are provided additional funds from the central government to support ICT (information and communications technology) in schools, unlikely that schools have sufficient operational funds
MOE plan for future investments in hardware for ICT4E	ICT Master Plan to purchase 750,000 Intel classmate devices for P1–P6 students
% of rural to urban primary schools	72% to 28%

¹⁶⁸ Read, N. (2014). Calculating the TCO of ICT4E in Rwanda. International Education Partners, Windsor for DFID's Capacity Development Fund.

The emerging National Textbook Policy requires that all approved textbooks must be provided to REB/MOE in a PDF-format e-version. This requirement was initially proposed to be incorporated into the new curriculum bid documentation in preparation in 2015. However, it was not included in the bid documents sent out to publishers in May 2015. The new national ICT (information and communications technology) Master Plan states that one of the key objectives of the Master Plan is to achieve a switch from printed books to e-book distribution and adaptive learning.¹⁶⁹ The new curriculum rollout is perceived to be an excellent chance to revamp the delivery mechanism for books and other education contents to a new cloud-based adaptive system (in line with the completion of the 4G mobile network rollout). The Master Plan specifies that the key policy objective is to achieve the change from the provision of printed learning materials to digital learning materials and that printed book acquisition policy should be amended to enforce the change to e-books.¹⁶⁹

The cost-benefits section of the ICT Master Plan suggests significant cost savings in printing, distribution, and replacement costs when compared to traditional books. This section does not mention however that publishers charge for access to e-textbooks as well as the charges for data usage to download and view materials, nor does it consider that the provision of sufficient hardware will be a major cost item and will significantly increase annual school electricity, climate control, storage, and maintenance costs. Additionally, though e-textbooks may not deteriorate physically (although accidental deletion, file corruption, viruses, etc., can be counted as physical deterioration), the hardware to deliver the e-textbooks will need to be maintained and replaced on a regular basis, potentially at considerable cost.

The ICT Master Plan refers to a “cloud-based adaptive system in line with the completion of the 4G mobile

network rollout,” which clearly indicates that the delivery of e-textbooks to schools is intended to be via online data transfer. There are a number of issues associated with this mechanism as follows:

- ▶ Most Rwandan schools do not yet have an internet connection (in 2013 only 13% of schools reported a working internet connection).
- ▶ Many schools reporting a working internet connection may not have an “effective” internet connection for mass downloading, i.e. a connection with a bandwidth that enables downloading of large text and illustrations files.
- ▶ 63% of schools still have unreliable or unpredictable power provision and so would be limited in their ability to download.
- ▶ A reasonably calculated total download requirement would be about 2.48gb¹⁷⁰ for an all-age school. Primary or secondary-only schools would have a lower download requirement. For any school, this requires a great deal of potential download time and cost. If more than one textbook per subject and grade are approved, then this figure could double or triple.
- ▶ Whether ISP download costs are paid for by government, district, or individual schools, there will be a substantial download cost. If this cost is required to be paid by schools or districts, the lack of operational budgets could inhibit large-scale downloading.

The effective use of e-textbooks and/or e-reading books in schools depends upon a number of factors as follows:

- ▶ A good computer to student ratio to enable all students to have easy and regular access to the e-textbooks. The 2013 study of ICT4E in Rwanda concluded that there were big differences between computer to student ratios at primary and secondary levels and between different types

¹⁶⁹ MOE. (2015). National ICT Master Plan.

¹⁷⁰ There are 150 specified textbook (TB) titles and 163 teachers’ guide (TG) titles for the new curriculum. It is difficult to generalize about the size of TB/TG digital files because this depends upon the extent and nature of illustrative content and the complexity of design and layout. A review of TB/TG digital file sizes suggests that 10mb is a reasonable average for primary TBs and 6mb for TGs. (150 x 10mb for textbooks = 1,500mb) + (163 x 6mb for teachers’ guides = 978mb.)

of secondary schools. For example, the heavy investment in One Laptop Per Child (OLPC) has created an average primary computer to student ratio of 1:10, whereas the ratio for desktops and laptops in secondary schools was 1:33. However, when non-operational computers were removed, the secondary ratio declined to 1:45.

- ▶ The use of e-readers at home will depend upon school policies that allow students to take computers home with them, which in turn will depend upon much higher computer to student ratios than exist at present.
- ▶ Reliable electricity supply. The 2013 study reported that two-thirds of Rwandan schools had no reliable power source. It is the intention of the MOE that many schools should be provided with non-EWSA power supply sources, and the provision of solar panels is being supported by some development partners.
- ▶ Well-trained teachers confident in using new technology. It should be noted that many teachers currently do not even issue the current printed textbooks to students.
- ▶ It has been suggested that schools with low computer to student ratios could use their downloaded e-books to make photocopies for their students. However, photocopying is not cheaper than commercial textbook printing. There would be no savings in distribution costs because photocopying paper would still have to be distributed to all schools. Durability would also suffer, thus requiring repeated photocopying. Finally, the reproduction quality would be greatly reduced.
- ▶ The use of e-textbooks on small screen devices, particularly at primary level, is widely considered to be problematic and could have an impact on eye health.

It should be noted that achieving and maintaining high computer to student ratios, which are essential for the effective use of e-books and e-reading books, depends to a large extent on good school storage and effective and regular maintenance. The 2013 study of

ICT4E in Rwanda noted that there were continuing problems with poor and insecure storage facilities for expensive hardware and software. ICT provision requires secure and weatherproof storage with protection against dust and moisture in particular. The report also noted that hardware maintenance was difficult, with only 4.4% of schools possessing current maintenance service contracts. In primary schools, only 1.7% of schools had maintenance contracts, but this is probably because the OLPC Department in REB was providing some maintenance support services to primary schools at low/no cost. In rural areas, there are few reliable, professionally competent maintenance services, and many rural schools are concerned that hardware transportation over mountain paths and rough tracks for servicing and repair could do more harm than good to delicate electronic hardware. REB is in the process of developing digital materials for use on OLPC devices.

In summary, Rwanda has a policy of replacing hard copy TLMs with e-materials, but the costs of this transition will be very high if all the necessary building blocks for success are to be put in place. It is likely that e-book use on a national scale—as opposed to urban use only—will not be widely available in the short term. In the meantime, there is concern that the planned major investments in hardware could divert funds away from other educational budget needs. Many of the detailed technical and strategic issues involved in developing digitized TLMs on a national scale have not been covered adequately in either national policies or the ICT Master Plan.

4. Country Findings and Market Gaps

4.1 *Authorship and Publishing Capacity*

In 2009, Rwandan publishing was undeveloped. Only two Rwandan publishers submitted bids for the establishment of the approved book list. The 13 additional publishers who participated were from France (1), the UK (4), Kenya (5), and Uganda (3).

¹⁷¹ Read, N. (2014). Calculating the TCO of ICT4E in Rwanda. International Education Partners, Windsor for DFID's Capacity Development Fund.

In the 2015 bid, currently in the process of evaluation, 31 bids were submitted including 12 Rwandan publishers. The remaining 19 consisted of 2 UK publishers, 1 publisher from the Republic of South Africa (RSA), 5 from India, 3 from Uganda, and 8 from Kenya. Rwandan publishing has also grown due to a couple of different factors. One factor is market opportunities from regular bid calls for approved-status textbook courses, reading books, and other supplementary materials as well as regular school-based funding. Another source of growth has been educational publishing training and capacity building provided by a number of different donors and NGOs. These trainings focus particularly on primary reader development; donors have included USAID, DFID, UNICEF, and Save the Children.

4.2 Printing

Rwandan printing is still small-scale, and although there has been some inward plant and staff capacity training investment, it is still not considered by local or regional publishers to be competitive in price, quality, and reliability with international printing centers. The standard MOE production specifications for a primary level reading book are:

- ▶ **Text paper** – 80 gsm wood-free offset uncoated with a brightness of 83% and opacity of 90%
- ▶ **Cover card** – 260–280 gsm one-sided white art card, 340 microns with UV varnish or laminate finish of minimum 12 microns secured by 2/3 rustless wire saddle stitches according to format for up to 96 pages in extent
- ▶ **Font** – 12 point type size using only fonts with simplified letter formats

The Vice President of the RPBA commented that Rwandan printers did not lack investment funds or capacity but that they mostly lacked demand. For example, the largest Rwandan printer, Printex, has all the means to invest in the most sophisticated equipment, but publishers preferred to print internationally, so there was no incentive to invest in upgrading. Despite regular reports to the contrary, there is at present no sign of any significant

investment from Indian printers. The only Indian-owned printer, Imprisco, has had little impact to date.

4.3 Procurement

Since 2009, Rwanda has operated a system of school-based selection and ordering of the TLM that schools wish to use in the classroom from an approved list of textbooks, teachers' guides, reading books, atlases, dictionaries, grammar books, teachers' reference books, A/V materials, and teaching aids. The MOE considered this list to be the minimum TLM required for schools to deliver curriculum objectives. In 2009, the MOE launched a call for bids from publishers for all primary and secondary grades using the international procurement systems adopted by the Rwanda Public Procurement Agency (RPPA) supplemented by a rigorous evaluation methodology, criteria, and marking scheme—including price—to select the best titles at acceptable prices for their approved list of evaluated titles. Price accounted for about 25% of the total evaluation marks. Different evaluation systems, criteria, and marks were designed for different TLM categories. The final approved list with prices was published in newspapers, made available on the MOE website, and sent to schools as a booklet, so that virtually all schools knew the options from which to select. There were 3–4 competing textbook series approved per subject and grade for P1–S3 and two approved textbook series for grades S4–6. Intensive publisher marketing to schools has proved generally beneficial by providing them with information, inspection copies, and even pedagogic workshops. Schools were provided with an annual per capita TLM budget and two order forms for textbooks/teachers' guides and for supplementary materials. Schools are required to spend 80% of their annual budget on textbooks and 20% on supplementary materials, including reading books, as the basis for the development of reading book collections in every school and the creation of effective school and classroom libraries.

Schools do not receive their TLM budgets in cash, but the two order forms specify the amount that schools

can spend. Schools pass their orders to their district education office which loads the individual school orders onto a specially designed district TLM MIS that checks to ensure that school orders are within budgetary limits. Completed school orders by districts are then transferred online to the MOE central TLM MIS database which consolidates all school orders and provides publishers with a single print order for each approved title and a distribution schedule that specifies by district, sector, and cell which schools have ordered the title. Because the wholesale and retail book trade in Rwanda is quite weak and doesn't provide national coverage, publishers are responsible for delivery of their orders direct to schools. Annual successful school order rates are around 98%, and successful delivery rates are consistently over 95%. Publishers are not paid for their supplies until a signed and stamped delivery slip corresponding to the school order form for every school is submitted in support of their invoices. Thus, publishers are accountable for correct and undamaged delivery of all ordered TLM stocks direct to schools. Schools are strongly supportive of the system, as it provides delivery of their orders direct to school premises at no cost to the schools. The previous system required school collection from district offices and was often late and inaccurate.

It should be noted that there are mountainous areas of Rwanda along the shores of Lake Kivu and in the northern volcano area where 80% of schools may be off-road and where all deliveries have to be achieved by head portage over rough terrain and frequently in heavy rain. Yet the publisher delivery system has achieved very high rates of successful delivery with no cost to schools, largely because payment depends upon proven successful delivery.

A second call for bids was announced in 2012, mostly to support the USAID project, to increase the number of decodable and levelled readers in Kinyarwanda and English to support literacy and numeracy in early grades. A third call was announced in 2015 for new TLMs to support the new competency-based pre-school, primary, and secondary school curricula. REB intends to revert from decentralized

school-based ordering against per capita budgets to the central allocation of TLMs to schools for this procurement because it believes that it is faster than school ordering. It is not yet known whether this will be a permanent policy change or just a temporary measure to support the launch of the new curriculum. Publishers will still be required to undertake school deliveries because this has been proven to be a successful and reliable system.

The MOE decision in 2009 to introduce open competition for TLM selection via internationally approved procurement and evaluation procedures and to make successful publishers responsible for the distribution of their titles direct to schools was based on growing concerns about the transparency, efficiency, and management of previous single title procurements where decisions were frequently delayed for two years or more. The MOE was also concerned about the repeated failures of state-managed TLM distribution. The introduction of new MOE policies in 2009 had a significant impact on local, regional, and international publishing by providing the possibility of open access to the state school TLM markets at both primary and secondary levels. Publishers in the UK, Kenya, Uganda, and to a lesser extent Rwanda became seriously interested in the Rwandan TLM market for the first time and were encouraged to participate by the adoption of international procurement and evaluation standards which promised fair and uncorrupted decision making. One of the notable MOE innovations was the introduction of regular meetings between the MOE and bidding publishers and local distributors to present new procedures and to discuss problems arising. These meetings meant that the switch to publisher distribution to schools was accepted without significant protest by local booksellers. The decision to revert from school-based ordering to central allocation will remove from the publishers the work and costs of marketing to schools, which will not necessarily benefit schools who received useful information on TLMs from publishers' marketing campaigns. Central allocation may not be as accurate in meeting school needs as school-based ordering.

4.4 *Distribution*

There is no wholesale bookseller, and there are only a handful of retail booksellers who operate on a relatively small-scale in Kigali and one other urban center. Rwandan bookselling has limited capacity to service rural areas and no capacity to offer national book distribution services to schools. In district centers there are stationers who hold limited stocks of key textbooks for sale to private schools, but as a general rule these stationery shops do not stock reading books and do not have the skills or the finances to deliver to schools. The failure of the bookseller network to expand into rural areas is a result of the lack of a reliable rural market caused by low purchasing power, less than desirable literacy levels, and the lack of a well-defined reading habit. Booksellers in Kigali do, however, report that reading book sales are increasing as the result of reading book supplies provided to schools.

Previous state-organized TLM distribution via district offices to schools did not have storage facilities, established management systems, trained staff, or reliable operational budgets, and the results of this system were unsatisfactory. An independent survey of textbook availability in schools, funded by DFID and conducted in 2007, demonstrated conclusively the sub-standard results of state-organized TLM distribution. The 2009 decision to switch to publisher distribution direct to schools as a condition of the award of approved status was not opposed by the booksellers and has been remarkably successful as well as fully and transparently accountable. Publishers have complained about the absence of head teachers and deputy head teachers from many off-road schools to sign for deliveries, as it has required publishers to make expensive second or even third delivery visits. They have proposed, instead, that they deliver to district or sector offices and leave funds for schools to hire porters.

4.5 *Teacher Training and Storage Issues*

Learning materials may be successfully delivered to schools, but their value is limited unless teachers

know how to use them to their full potential in the classroom. This is a very widespread need in many countries and has been much discussed in Rwanda. Also, both pre-service and in-service training for teachers in the effective management and use of textbooks, readers, and other materials is not yet fully established and is an obvious next move towards the full use of TLMs in school. Books and many other learning materials can be vulnerable. They may be destroyed by rain, damp, vermin, insects, fungus, or misuse, or they can be lost or stolen for resale to private schools. Secure and weatherproof storage needs to be improved in many schools throughout the country, especially in rural and remote areas. Suggestions have been made at the Quality Implementation Working Group within REB for a list of the minimum requirements for a school to store and protect its TLMs and that a budget to provide for this will have to be provided for every school. All schools and DEOs have been given a handbook for the management, use, and conservation of TLMs and refresher training in these matters is going to be a recurrent event for all schools and DEOs. Classroom-based storage in the form of lockable cupboards with shelving suitable for book storage will be included in every school building and classroom extension design. Having TLMs close at hand in primary classrooms rather than in a central school store generally increases the likelihood of more frequent and effective use.

4.6 *Financing*

Annual TLM budgets for textbooks and supplementary materials from 2010 to 2013 are provided in Figure 5 (NB: 1US\$ = RwF740 as of December 2015). No TLM budgets were allocated in 2014 and 2015 because all textbooks and teachers' guides were scheduled to be replaced by new curriculum materials. The budget allocated for new curriculum materials in 2016 is currently specified at RwF5.4 billion (US\$7.3 million), which is inadequate to provide sufficient TLMs in all subjects and grades to support the launch of the new curriculum. The large TLM budget underspend in 2010 is attributable to schools adjusting to a new system

Figure 5: School budget data for textbooks and supplementary materials, US\$ 2010–2013¹⁷²

Year	School TB Budget	School TB Budget Spent	School SM Budget	School SM Budget Spent	School Budget	School Budget Spent	School Budget Remaining
2010	8,020,735	6,970,841	1,983,319	1,574,538	10,004,054	8,545,379	1,458,675
2011	3,323,522	3,278,547	831,401	823,564	4,154,923	4,102,111	52,812
2012	5,886,197	5,824,496	1,889,128	1,907,352	7,775,324	7,731,848	43,476
2013	4,111,121	4,025,480	1,068,321	1,062,498	5,179,442	5,087,978	91,464

Source: MOE LTM MIS

of decentralized ordering. By 2011, almost all schools had become familiar with the ordering system, and budget underspends thereafter were greatly reduced.

Figure 6 demonstrates the pupil/textbook ratios and the pupil/reader ratios achieved by schools for different primary subjects and grades resulting from the budget funds made available as above from 2010–

2013. In every primary subject, the ratios are better in upper primary than in lower primary and this represents conscious ordering decisions by schools. For lower primary, schools ordered on average just one reading book for every 18 students, which also represents conscious school decisions on TLM priorities. However, in pre-schools one reader was ordered for every 2.5 enrolled students.

Figure 6: Enrollment and TLMs by type, 2013¹⁷²

Subject	Grade Level	Enrollment	Ordered Qty	Delivered Qty	Ordered Ratio	Delivered Ratio
Dictionary	P1–P3	1,563,255	24,493	24,483	63.82	63.85
	P4–P6	811,195	64,784	64,695	12.52	12.54
English	P1–P3	1,563,255	441,410	441,326	3.54	3.54
	P4–P6	811,195	411,902	418,098	1.97	1.94
Kinyarwanda	P1–P3	1,563,255	553,463	552,197	2.82	2.83
	P4–P6	811,195	428,014	426,862	1.9	1.9
Maths	P1–P3	1,563,255	434,829	434,608	3.6	3.6
	P4–P6	811,195	348,137	361,615	2.33	2.24
Social Studies	P1–P3	1,563,255	323,288	329,323	4.84	4.75
	P4–P6	811,195	334,556	337,437	2.42	2.4
SRM	N1–N3	115,903	45,199	45,246	2.56	2.56
	P1–P3	1,563,255	86,970	86,937	17.97	17.98
STE	P4–P6	811,195	558,902	558,548	1.45	1.45

Source: MOE LTM MIS

¹⁷² MOE. (June 2013). Joint Review of the Education Sector Summary Report.

Figure 7: Average price for textbooks and readers by grade level, 2010–2013, US\$¹⁷²

Grade Level	2010	2011 ¹⁷³	2012	2013
P1–3 Textbook	2.39	2.73	2.68	2.68
P4–6 Textbook	2.63	3.03	3.09	3.09
S1–3 Textbook	3.20	3.76	3.95	3.95
S4–6 Textbook	9.99	11.75 ¹⁷⁴	6.94	6.94
P1–3 Reader	1.47	1.68	1.55	1.55
P4–6 Reader	1.72	2.09	2.10	2.10
S1–3 Reader	3.73	4.31	4.31	4.31

Source: MOE LTM MIS

Figure 7 provides grade level average unit prices in US\$ for the textbooks and readers provided to schools from 2010 to 2013.

Although Rwanda has allocated TLM funds to schools on a regular basis, it is clear that these are currently insufficient to provide all of the textbooks, teachers' guides, reading books, supplementary materials, and teachers' aids specified by the MOE as necessary to support curriculum objectives. The introduction of the new curriculum in 2016 requires the replacement of all subject textbooks and teachers' guides for every primary and secondary grade, but insufficient funding has been allocated to achieve this.

However, the announcement of regular invitations to bid in 2009, 2012, and 2015 and the provision of substantial TLM purchase budgets in 2010, 2011, 2012, and 2016 have created a reliable and predictable TLM market in Rwanda which has supported the growth of Rwandan publishing from the 2 Rwandan bidders in 2009 to the 12 Rwandan bidders in 2015. This growth has been supported by the requirement for Kinyarwanda to be the LOI in pre-schools and P1–3 and the provision of authorship and publishing training to Rwandan publishers by development partners. It is interesting that the 2016 bid has attracted Indian bidders and bidders from the RSA (which now include UK bidders who previously submitted bids directly but in 2016 opted to bid via their RSA subsidiaries). This seems

to represent a strategic decision by a number of UK publishers who wish to develop their African markets via the RSA. The increase in the total number of bidders from 12 in 2009 to 31 in 2015 is a clear indication of the impact of regular and predictable TLM funding on market creation and publishing development.

4.7 School Management and Usage

Among the most important factors contributing to the poor performance of TLM provision up to 2009 were poor planning and management within the MOE, districts, and schools as well as a lack of good information and poor communication between schools, DEOs, and the MOE. The decision to design and establish a sophisticated TLM Management Database as the core of the reformed TLM provision system was a critical component of the reform process. In practice, the plan had a multi-million dollar annual TLM budget and hundreds of approved titles for schools to choose from. As a result, nearly 3,000 schools created management profiles in which management computerization was essential. In addition, it is GOR's policy to encourage appropriate computerization in both the public and the private sectors.

The TLM management database now provides information and tools that schools use to plan and manage system costs effectively and efficiently. In addition, the decentralization process is now

¹⁷³ The significant price increases in 2011 were the result of the new 15% withholding tax on textbook imports.

¹⁷⁴ The high textbook prices for senior secondary up to 2011 were the result of using imported textbooks. When the 2012 bid selected new textbooks developed specifically for the Rwanda curriculum and the Rwanda market, the average textbook prices fell dramatically

strengthening the links between schools, DEOs, and MOE. Database upgrades now provide the inspectorate with reliable information to underpin school inspections, and their feedback provides the basis for assessing loss and damage rates, school management practices, levels of conservation, and increasingly should be a key factor in bringing the loss and damage rates in schools under control. The list of reports that can be generated by the database for national, district, sector, or even individual schools provides an unrivalled planning and management resource, but these tools have to be used to be effective.

The database ensures that the MOE now knows the TLM inventory for every school in Rwanda at all times. This allows districts and the inspectorate to check on book care, book life, and classroom usage. It will also improve planning capacity. Testing of advanced copies has ensured that all TLMs have met specified production standards to achieve durability for the first time—or publishers have been financially penalized. Random field testing ensures that deliveries to schools match the production standards of the advanced copies. Where publishers have delivered after specified deadlines or have failed to meet production standards, letters have been written drawing publishers attention to contractual penalties. Prices are fixed for 5 years, which enables forward financial planning to be accurate.

4.8 Digital Opportunities

Rwanda has laid out ambitious plans in its Textbook Policy and ICT Master Plan to switch from print-based TLMs to digital TLMs which include commitments to major purchases of OLPC devices for primary schools. However, fulfillment of the policy statement is not provided for in sufficient detail relative to the investment and efforts required not only in procuring the required hardware but also to roll out national power supplies and internet connectivity to schools, to provide the necessary levels of teacher training, school operational budgets, and negotiation of access to the hard copy TLMs in a variety of digital formats. A school digital market for TLMs is certainly

possible in Rwanda in the mid-term but will depend on progress in the areas listed above. Concern has been expressed by some donors that ambitious expenditure on hardware procurement could lead to underspending on other budget items, particularly hard copy TLM provision.

5. Discussion and Opportunities for a Global Book Fund

Rwanda has the advantage of being predominantly a monolingual country. Kinyarwanda is the LOI for pre-schools and P1–3, and the MOE recognizes that literacy is a high priority. The MOE also acknowledges that the provision of reading books for all primary and secondary grades is a major contributing factor to achieving early literacy. Despite the growing number of Kinyarwanda reading book titles in recent years, it is still an underserved local language. This situation provides an opportunity to fulfill the need for mother tongue and local language reading books while generating substantial orders to publishers and printers. Countries with many local languages spoken by relatively few people may have a more difficult time bearing the costs for many small print runs. On the basis, for example, of five copies per reading book title per class, print runs for P1–3 could be up to 20,000 copies with the possibility of additional sales into Burundi, which would significantly reduce unit prices. If 50 titles were supplied to each school, the total print order for Rwanda would be around 1,000,000 copies.

Rwanda, in common with most SSA countries, has an early exit LOI strategy with transition into English as the LOI in P4. Readability of textbooks and readers in English is an issue in Rwanda, and for the 2015/16 bid evaluation Rwanda has added a readability evaluation criterion. Thus, support for upgraded English language learning in Rwanda in P1–3 should be a priority to ensure that learning gains in the early grades are maintained when the LOI transition occurs. It is possible that a GBF intervention would need to support primary grade reading books in English in parallel with Kinyarwanda for this purpose.

Although the Government of Rwanda has made regular TLM budget allocations supported by donor contributions to the general budget, the funding has not been sufficient to enable the development of significant, widespread stocks of reading books nor the creation on a national scale of school and classroom libraries. Schools have concentrated their annual TLM budgets on ordering textbooks, with priority given to higher grade levels, and only thereafter to reading books in lower primary grades. This causes a gap in this crucial time for fostering early literacy. A GBF concerned with sustainability would need to seek assurances on continued funding of reading books at agreed levels sufficient to support and sustain regular reading by all students.

5.1 Conclusions

The distribution of TLMs in Rwanda via publishers has been accountable, efficient, and successful with greater than 95% of orders delivered to schools at no cost to schools since 2010. The costs of distribution to schools are included in the bid prices submitted by bidding publishers.

School storage for both TLMs and hardware remains a problem in many Rwandan schools, and although this is now recognized by the MOE, it is likely to remain a problem for both hard copy and digital reader provision for some time to come.

Local language training is not an issue in Rwanda because the teaching of reading and writing in Kinyarwanda is long-established. As a result, there is nascent local authorship and publishing capacity in the local language which has been supported by recent donor investment.

The development of pre-service and in-service training modules for teachers and schools in TLM management, conservation, and use has not yet been completely achieved, although TLM management guidelines and handbooks have been supplied to all schools. In 2016, schools will be supplied with a simple guide to basic techniques for using TLMs effectively in classrooms.

The possibility of the emergence of a digital primary reading book market is strongly supported by government policies and investment plans in ICT4E, but there are many planning and implementation details that still need to be resolved.

Large print-run printing will likely continue to be procured from specialist international printing centers in Abu Dhabi, Mauritius, India, and Malaysia. Local printers will likely be contracted for short print-run work, largely from local publishers.

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7. Appendix

7.1 Appendix 1: Interview List

Name of institution	Type of institution	Name of Person met	Title
DFID Rwanda	Donor	Paul Atherton	Education Advisor
UNICEF Rwanda	Donor	Erin Tanner	Education Advisor
Save the Children	NGO/Implementer	Sofia Cozzolino	Rwandan Children's Book Initiative, Program Manager
Rwanda Education Board	MOE Department	Joyce Musabe Augustin Gatera	Deputy Director Head of Humanities
GS Runda Isonga	Rural/Pre Primary and Primary School	Emmanuel Munyaneza and Niyonzima Philippe	Head Teacher/ Dean of Studies
EP Gisozi II	Urban Primary School	Mukangemanyi Mamille	Head Teacher
Kibondo Editions	Local Publisher	Munyurangabo Jean de Dieu	Managing Director
Multicom	Local Printer	Kagabo Julien	Managing director/ Vice President of the Printers Association
Drakkar Ltd	Bookseller, Publisher	Lydie Hakizimana	Managing Director/ Vice President of the Publishers and Booksellers Union

7.2 Appendix 2: Quotations on the TLM Reforms in Rwanda

Publishing

- ▶ The market is still dominated by regional publishing, but Rwandan publishers have worked with UK and regional African publishers and gained skills and experience from them and are now using this experience to set up new publishing enterprises, especially in Kinyarwanda. Save the Children has supported local publishers by training authors and illustrators of children's books. This has been very helpful. Some of these books will be approved by REB and copies bought for schools. Arthur Barigye Mugunga – President, Rwanda Publishers Association

Choice of Books

- ▶ They used to give us books the schools didn't want and didn't need. Now the big change is that the schools order what they need. *Jean Pierre – Head Teacher, Bugasera*
- ▶ It's a democracy in education, because the teachers have to decide on the books that they want according to their budget. *Israel Rwigema – DEO*
- ▶ Now publishers come and market books, and teachers have ownership. From the beginning, the teachers have involvement because they choose the books; it was quite different from when the books were chosen by the Ministry. Now the teachers can choose after seeing the content. *Israel Rwigema – DEO*
- ▶ The great advantage is that before we received textbooks we didn't need, now we sit and discuss. The books are not chosen at random; we decide, and then we order the books we can use and match the number of copies to the number of children. Each book ordered is considered according to the content and methodology, and it's very helpful. *Head Teacher, Rwamagana*

Distribution

- ▶ Before the reforms, distribution used to be a problem for the rural areas. Transport was so expensive. Now it's fine, even far away, and it's free! *Jean Pierre Sinibagiwe – Head Teacher, Bugasera*
- ▶ We used to fetch the books from the MOE and bring them back to the district; it was tiresome and time-consuming. Getting books to the schools depended on the Head Teachers, and it was difficult. The way books are distributed and even used has changed and improved, not only in transport but the way we have access to the books. *Israel Rwigema – DEO*

Reading

- ▶ The children like the books in Kinyarwanda very much. *Fortune Kubwimana – Regional Inspector*
- ▶ Of course we have seen an increase in reading skills. Before, parents couldn't afford to buy books. Now we have reading books, novels, wall charts for biology and geography, and this has contributed to the students' reading culture and their understanding. *Head Teacher, Rwamangana – Evariste Banzubaze*

Results

- ▶ The big change is pupils' performance. Before, the books didn't correspond to the curriculum. Now we have books we have chosen ourselves, based on the curriculum. The teachers have no problems. *J-Pierre – Head Teacher, Bugasera*
- ▶ From P4, the children have already learned to read and write and count, and they can express themselves in English, speak and respond. It is the books which influence that. Because they read, they have been motivated; they write poems, stories, do drawings. *J-Pierre Sinibagiwe – Head Teacher, Bugasera*

Teachers

- ▶ I encourage the students to read, we do exercises together. If they don't understand, I try to explain. The books help me to prepare my lessons and to give the children homework, and I tell them to

ask their parents to help them. *Susan Sifa – Math Teacher, Bugasera*

- ▶ The great advantage of these textbooks and other TLMs is we can compare the effects from 2010 up to today. Before 2010, we had great difficulty in developing skills. The teacher had a textbook, but the students had nothing more, nothing for research. Now there are many materials, and students can increase their skills even in the absence of a teacher. Now we can share and discuss what is in the books. It is helping the school to develop and perform well because the student can learn without a teacher. The teacher can be ‘guiding not spoon feeding.’ *Germain Mbonigaba – Teacher of English in Rwamagama*
- ▶ Students like novels and dictionaries; we are happy with the books, but we need more. *Pelagie Nkundizanye – helping in the library bookstore in Rwamagama Secondary School*

Future

- ▶ I expect that in some years, some teachers will be writing books, or starting a bookshop. *DEO Bugasera*
- ▶ The reading culture is growing and will grow. *Head Teacher Sylvain Mudahimyuka, Kamonyi School*
- ▶ They learn to read, and then they start texting and using the Internet. *Head Teacher Sylvain, Kamonyi*

Kamonyi District

- ▶ What is good now is that teachers are involved in the choice of the book they will use. It’s good to choose. When students borrow reading books, they increase their vocabulary. In Primary 1–3, they learn their letters in Kinyarwanda, and then they can learn to read. When they go home, they can be helped by their parents, because the books are in Kinyarwanda. The students use the biology book, and then want to go further to books of reference, to learn more. *Head Teacher Sylvain Mudahinyuka*
- ▶ They learn well in Kinyarwanda. *Fidele Uwamahoro – DEO*

- ▶ They can’t have a library tomorrow, but they can use as much information as they can get in the classroom, use any materials there are. *Camille Kanamugire, Regional Inspector*

Rwamagama District

- ▶ In the old days, when I was in Kayonze, National Curriculum Development Center (NCDC) called the DEOs and said they had books and we should get a car and collect them. They gave each district a certain number of books, but schools had no idea what they were getting. Now REB asks the school to order according to their needs. The difference is that before, we got books not according to what the school needed, but now the books are according to the school needs, because teachers know what they need. *DEO Fidele Uwamahoro Rwamagana*

Quotes From Pupils

- ▶ If I didn’t have a textbook, it would be very difficult to study. I enjoy books because I can share my studies with my parents. I enjoy the division and multiplication exercises in the textbook and the science books. We would like more books. Quotes from 4 children – *Kessia, Yvette, Toussaint, and Chris in Bugasera*
- ▶ I like reading books of history in order to prepare for a better future. I like to read about sciences; I like to know about living things and animals. I like Geography and I want to know about the environment. I like the dictionary to help me with vocabulary. If you read your dictionary, you can become a translator. *Female student from Rwamagama*
- ▶ I read a book of history; it increased my knowledge of the past of my country and where my mother came from.
- ▶ Books improve our minds and help us to communicate with each other. Now I want to write poems and stories, study culture and world affairs. *Peter from Rwamagama*

Global Book Fund Country Study

SOUTH SUDAN

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1. Methodology

The South Sudan country study was conducted by International Education Partners (IEP) over the course of October 2015 – January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

For this study, IEP collected a wide range of relevant documentation and reports on teaching and learning material (TLM) provision in South Sudan via literature review, primary research, and donor recommendations. IEP also drew upon its considerable previous in-country experience on TLM and Language of Instruction (LOI) issues in South Sudan, including undertaking the annual reviews in 2013 and 2014 of the UK Department for International Development (DFID)-funded textbook and supplementary materials provision project, working with the Ministry of Education Science and Technology (MOEST) on the development of a draft national TLM policy, and with basic cost implications.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background and Education System

South Sudan (Figure 1) was founded as an independent country on July 9, 2011. In 2015, the World Bank estimated its population at 12 million. 81% of the population are in rural areas, with the remainder living in towns and cities. The UNESCO Institute for Statistics shows the annual national per capita income for South Sudan as US\$790 which classifies it as a low

Figure 1: Map of South Sudan



income country. Adult literacy is estimated at 27% of the population aged over 15, with 40% of males and 16% of females classified as literate.¹⁷⁵

The structure of the education system provides for up to 3 years of pre-school, 8 years of primary education, and 4 years of secondary education. There is also an Alternative Education System (AES) which provides primary education to older out-of-school children via an Accelerated Learning Program (ALP) in which the primary curriculum is delivered in 4 rather than 8 years. Levels 1 and 2 of the ALP, with enrollments of 52,265 in 2015, correspond to the curriculum of the lower primary grades.

Reports from donors and implementers suggest that the official education management information system (EMIS) data is often inaccurate and unreliable.^{176,177} Bearing this in mind, official MOEST enrollment data for 2015 is provided below. The

¹⁷⁵ World Bank. (2015). South Sudan Overview. Retrieved from: <http://www.worldbank.org/en/country/southsudan/overview>

¹⁷⁶ Bayley, C., and Burchell, K. (July (2014). *CKP End of Project Report*. London: CKP for DFID/MOEST.

¹⁷⁷ Montrose International. (2014). *Evaluation of the DFID South Sudan Textbook Report: Assessment Report, Baseline Year and Case Studies*. DFID for MOEST.

impact evaluation of the DFID Textbook Project¹⁷⁷ reports that drop-outs from both primary and secondary schools are increasing and that school enrollments are declining. This is reported to be the

result of the ongoing conflicts, increasing population disruption, and the lack of student learning in existing schools.

Figure 2: School Inventory and Student Statistics¹⁷⁸

School Type	Number of schools by type and ownership; Number (%) 2015			Students per school by school type and student gender, Number (%) 2015		
	Total	Gov	Non-Gov	Total	Male	Female
Alternative Education System (AES)	1,156	744 (64%)	412 (36%)	106,838	60,859 (57%)	45,979 (43%)
Pre-primary (PPR)	733	235 (32%)	498 (68%)	89,210	46,570 (52%)	42,640 (48%)
Primary (PRI)	2,912	2,057 (71%)	855 (29%)	1,005,362	600,283 (60%)	405,079 (40%)
Secondary (SEC)	245	125 (51%)	120 (49%)	58,928	39,803 (68%)	19,125 (32%)
Teacher Training Institute (TTI)	13	8 (62%)	5 (38%)	1,116	780 (70%)	336 (30%)
Technical Vocational Education and Training (TVET)	31	19 (61%)	12 (39%)	3,050	1,856 (61%)	1,194 (39%)
University (UNI)	12	1 (8%)	11 (92%)	9,070	6,921 (76%)	2,149 (24%)
Total	5,102	3,189 (63%)	1,913 (37%)	1,273,574	757,072 (59%)	516,502 (41%)

Figure 3: Conflict States School Data^{179,180}

School Type	Number of schools by type and ownership; Number (%), 2015			Students per school by school type and student gender; Number (%), 2015		
	Total	Gov	Non-Gov	Total	Male	Female
AES	137	91 (66%)	46 (34%)	29,434	17,600 (60%)	11,834 (40%)
PPR	54	12 (26%)	40 (74%)	19,387	10,083 (52%)	9,304 (48%)
PRI	439	326 (73%)	113 (26%)	225,116	132,217 (59%)	92,899 (41%)
SEC	27	13 (48%)	14 (52%)	5,854	4,506 (77%)	1,348 (23%)
Total	657	444 (68%)	213 (32%)	279,791	164,406 (59%)	115,385 (41%)

¹⁷⁸ MOEST. (2015). South Sudan EMIS All Datasets 2008–2015, Directorate of Planning and Budgeting Department of Data and Statistics Education Management Information System Unit.

¹⁷⁹ Information from the three states affected by the conflict is available but incomplete.

¹⁸⁰ MOEST. (2015).

¹⁸¹ SIL. (2014). South Sudan Ethnologue.

2.2 Country Language Profile

There are 47 local languages and five language families in South Sudan¹⁸¹, according to the SIL Ethnologue, although only 37 local languages have established orthographies. Recent data from the Department of National Languages suggests that there may be more than 60 local languages, although many of these have very small speaking populations.

The MOEST has considered 37 local languages as part of its planning for the introduction of local LOIs for lower primary grades when the new curriculum is launched. The MOEST is also considering the status of Juba Arabic—a form of pidgin Arabic that is widely spoken in Juba and the southern states which could be classified as an additional official local language.

The calculation of school enrollments for potential national LOIs by regions, counties, *payams*, and schools is very problematic. Grade level enrollment data and student population locations for each national language are not known with any accuracy. Current data are reportedly often based on data from the 1980s, pre-dating the conflicts that have caused so much disruption to the population and thus not taking into account the dislocation of the schools and student populations created by the conflicts. Although it is government policy to provide pre-school and lower primary education in national languages, there is little accurate detailed current data on numbers and locations. The latest EMIS data collection (2015) did not collect any data on national languages. SIL is currently working on a language and school mapping exercise which might help to fill this important data gap.

There is estimated data on the percentage use of the main national languages, and there is some information on the regions where these languages predominate. In addition, there is enrollment data for pre-primary schools and primary schools from the EMIS census. This was not the case for individual pre-school and primary grade levels nor for the breakdown between state and private schools. In

some counties, up to 5 or 6 national languages may be in use, and it is not possible from the available EMIS data to estimate how many students attend schools in what languages. Figure 4 provides a rough summary of the main languages and their approximate student enrollment numbers derived from information received from the Department of National Languages based on 2013 data.¹⁸²

On the basis of these data provided by the Department for National Languages, national language editions for the four main languages (Dinka, Nuer, Bari, and Zande) would provide coverage for 83.79% of the P1–P3 enrollments. The addition of 4 other languages would provide coverage of 90.50%, and 9 more national languages would achieve 96.15% coverage. Considering the increases in origination costs associated with multiple language editions, it was suggested by the workshop participants that an initial national language target should be restricted to 4–8 national languages.

The current enrollment data is sufficient to make educated cost estimates, but is not sufficient to support an accurate distribution schedule of TLMs in multiple languages. An updated EMIS combining enrollment data with national language data by state, county, *payam*, and school is essential before the next textbook and reading book procurement and distribution takes place. Ideally, this would be achieved by mid-2016.

Alternatively, school-based ordering based on per capita TLM budgets could be introduced. Knowing their own language profiles, subject needs, grade level needs, and preferences allows schools to make informed buying decisions better than the MOEST. This would require only that schools be provided with an annual TLM capitation and order form which enables schools to specify the language that they want their TLMs to be supplied in. When the order form is returned to the MOEST, a simple software program can easily consolidate orders according to

¹⁸² Read, N. (2014a). *Annual Review of DFID Textbook Project*. Windsor: IEP for DFID/MOEST.

Figure 4: National Language Summary Table: Enrollment by grade, and percentage of total P1–P3 enrollment

Rank	Language	P1	P2	P3	P1–3	% of Total
1	Dinka	181,030	122,918	94,277	398,225	46.7%
2	Nuer	92,615	67,952	53,994	214,561	25.3%
3	Bari	28,437	22,506	21,235	72,178	8.5%
4	Zande	10,847	8,616	7,663	27,126	3.2%
Note: National Language Roll Numbers and Rank Orders are progressively less reliable from here ¹⁸³						
5	Shilluk	6,684	6,126	5,503	18,313	2.2%
6	Anyuak	7,824	5,845	4,779	18,118	2.1%
7	Avokaya	4,200	3,180	3,190	10,570	1.2%
8	Moru	4,172	3,040	2,832	10,044	1.2%
9	Madi	2,641	2,299	2,491	7,431	0.9%
9	Acholi	2,641	2,299	2,491	7,431	0.9%
11	Buruun	3,380	1,997	1,358	6,735	0.8%
12	Murle	2,704	1,937	1,437	6,078	0.7%
13	Lotuho	2,252	1,746	1,553	5,551	0.7%
13	Imurok	2,252	1,746	1,553	5,551	0.7%
13	Lokwaya	2,252	1,746	1,553	5,551	0.7%
16	Bongo	2,362	1,534	1,330	5,226	0.6%
17	Toposa	1,819	1,303	1,012	4,134	0.5%

Source: Derived from Data provided by Department of National Language

title and language and will also provide school-based distribution schedules.

The lack of local language data and the importance of filling this data gap were recognized by the National and Foreign Language Conference (June 2015). The conference recommended that government institutions systematically collect accurate data on which languages teachers are able to speak, read, and write. They also suggested that government should investigate which languages are used by how many students in which schools as well as which teaching and learning materials are being used in what languages and in which schools.

2.3 Language of Instruction (LOI) Policy

Proposed LOI policies

The 1st National and Foreign Languages Conference (Juba, June 2015) highlighted South Sudan's linguistic diversity. The recognition of the value of beginning education in and through the medium of these National Languages is set out in the General Education Act (2012) and the new Curriculum Framework (2014). These documents assert that National Languages are to be used as the LOI in pre-primary grades and from P1–P3. In P4 and P5, children will make the transition to learning in English. At the same time, students will continue

¹⁸³ Roll numbers are often based on counties where several languages are spoken, but the roll numbers for each have not been disaggregated by the Department, and the calculation is thus based on an equal allocation of roll numbers to each specified language. This discounts the likelihood of dominant languages which will tend to be used as the LOIs if there are mixed local language enrollments in schools. More county level research into national languages and the identification of dominant languages is required to achieve the necessary accuracy in national language print requirements.

with national languages as curriculum subjects through P8. Arabic will be introduced at P5, with French and Kiswahili offered as subject options at the secondary level. Thus, in lower primary schools, support will be required not just for the development of literacy skills in selected local languages as the LOIs but also for English language learning which will become the LOI from P4 onwards.

The current MOEST policy on languages of instruction is to use local languages as the LOI for the first three grades of primary, with English taught as a curriculum subject in preparation for the transition to English as the transitional LOI in P4 and P5 and as the full LOI from primary 6 onwards. There are currently many potential local language candidates, and at the time of writing no final decisions have been taken on which local languages will be used to launch the new curriculum from 2017/2018.

Implementation Considerations

At the National Languages Conference in June 2015, there was broad conceptual acceptance of a pilot project based on one national language per state as the LOI. This was based on the assumption that there would be 10 states, however, there is a proposal under discussion for an administrative structure based on 28 states. The MOEST believes that it would be detrimental to select only a few languages as LOIs because this would create alienation and conflict in those languages not selected, and this would undermine national unity in a country comprising so many ethnicities and language families.

Another consideration is the potential cost implications of introducing multiple LOIs. These investments should include teacher training in reading and writing in the selected local languages,¹⁸⁴ capacity development for textbook and reading book authorship, and publishing skills-training in local languages. The June Conference was realistic about

the problems to be overcome in introducing local languages as LOIs for P1–3 and as curriculum subjects from P4–P8. It emphasized that the policy should not be introduced hastily but needed to be started from 2017/2018.

In the MOEST interview, it was stated that major constraints for the early attainment of literacy and numeracy are the lack of support materials for reading and the availability of textbooks in local languages. They indicated that the development of textbooks, teachers' guides, and reading books in local languages was the current priority of the MOEST. In this context, a US\$30 million USAID proposal to review orthographies, authorship, and publishing capacity for Dinka, Nuer, Bari, Toposa, and Zande has just been approved by the MOEST. However, SIL have recently commented¹⁸⁵ that they are not yet aware of any developed MOEST plans for core textbook and reading book development for the new curriculum in any local languages. Thus, while there is a clear government policy to use local languages as LOIs in lower primary grades, there are not yet any clear plans to achieve this objective; although policy implementation guidelines have been drafted and an action plan is in process. There is no reading book development specified in the draft TLM policy document being revised in 2015.

3. Current Print and Digital Reading Book Provision

Historical Difficulties in TLM Provision

Past TLM provision projects reveal the difficulty of TLM provision in South Sudan and also impart lessons. For instance, in 2007, UNICEF financed textbook provision to schools based on manufacturing outside South Sudan. UNICEF provided distribution of the procured textbook stock down to county level, leaving onward movement to schools as the

¹⁸⁴ While teachers may be fluent in speaking local languages, they often experience problems in reading and writing their local language, simply because they have never received instruction in these skills.

¹⁸⁵ Email from SIL to IEP (October, 2015).

responsibility of counties, but it has been widely reported, including by UNICEF, that stock movements from counties down to payams and individual schools were very poor and that a significant proportion of the procured stock did not reach the target schools. Visits to schools as part of the DFID project annual reviews found little sign of any significant levels of stock remaining from the 2007-funded supply. The basic problems were the lack of county level funding to move the book stock and the lack of logistical and developed management skills.

In 2008, textbook supply to South Sudan effectively stopped in the wake of a corruption scandal. It was alleged that attempts were made to influence the outcome of an Invitation to Bid for textbooks which was due to be released using funds from the World Bank. As a result of the scandal, the World Bank re-allocated its funding away from textbooks to school construction. This meant that 1.9 million children in South Sudan did not receive textbooks in 2009, 2010, and 2011. The 2010 school census identified the lack of textbooks as one of the key causes of school drop outs. Many of the textbooks that were supplied in 2008 never reached schools and were kept in county offices, often in poor storage conditions, because of the lack of financing to support onward movement to schools.

Between 2012 and 2015, the DFID Textbook Project, at the request of the MOEST, provided US\$15.7 million to procure and supply primary textbooks, teachers' guides, reading books, and other supplementary TLMs to schools, and to undertake the construction of textbook storage facilities at 78 county education offices and supply book storage boxes to 3,000 schools. At its conclusion, the project had procured and supplied:

- ▶ 9.18 million textbooks for P1-P8 at an average unit cost of US\$0.98
- ▶ 800,000 reading books & reference materials at an average unit cost of US\$2.08

The project supplied TLMs to 1.37 million students in P1-P4 & L1-L2 based on 1:1 textbook:pupil ratios. It supplied to an additional 0.5 million students in P5-P8 & L3-L4 in 4,269 schools and ALP Centers along 1:3 textbook:pupil ratios. In practice, these ratios were rarely achieved in schools because actual enrollments were considerably higher than the EMIS enrollment data. Given that 80% of schools in South Sudan were classified as 'under the tree' schools, it was considered more appropriate to supply textbooks in portable weatherproof plastic boxes in which the books could be stored while not in use. For long term storage, it was decided to provide every County Education Office with a 20' sea container mounted on concrete blocks, thus avoiding the expense and time of constructing full concrete bases.

All of the books were supplied with durable production specifications on the basis of an assumed 5-year classroom life. The basic specification was 80 gsm white wood-free uncoated text paper and 220 gsm one-sided art cover card with wire saddle-stitched bindings for extents of less than 96 pages and thread-sewn bindings for extents above 96 pages with UV-varnished cover finishing. It was later recommended that the cover card should be upgraded to a minimum 240 gsm card for future supplies.¹⁸⁶

All of the materials supplied in the DFID project were English language materials, which affected their impact in many schools where both teachers and students had only limited English language competence. Despite this, 70% of teachers interviewed claimed that they regularly used the teachers' guides in lesson preparation.¹⁸⁷ The MOEST estimates that reading book provision in most pre-schools and primary schools is still poor despite the UNICEF and DFID projects, but there are some better schools in urban areas where reasonable levels of reading book stocks, mostly in English, are available.

¹⁸⁶ Bayley, C., and Burchell, K. (July 2014). CKP End of Project Report. London: CKP for DFID/MOEST.

¹⁸⁷ Montrose International. (July 2015). *Evaluation of the DFID-Funded South Sudan Textbook Project – Assessment Report, Year 2*. DFID for MOEST.

Impact of Regional Conflicts

Throughout the project, security was an ever-present concern. Outbreaks can rarely be predicted and often result in the closure of transport routes for a period of time. For example, in December 2013, fighting began, and it was not possible to operate in the three conflict-affected states of Unity, Jonglei, and Upper Nile. At the time, there were 84 containers which had been dropped at many of the County Education Offices in the three states which were to be delivered as the dry season of December 2013 started. Unfortunately, no planned deliveries to schools were possible in the conflict states throughout 2014, although some humanitarian non governmental organizations (NGOs) were able to assist County Education Directors in accessing their textbooks in some areas. During the period March – June 2015, with the assistance of humanitarian NGOs, it was possible to ensure that those books which had survived the conflict were distributed to functioning schools. In the conflict-affected states, 23 containers, to a value of US\$996,000 (32% of total stock allocated to these states), were destroyed in the fighting.

4. Country Findings and Market Gaps

4.1 *Authorship and Publishing Capacity*

South Sudan has no commercial publishing industry, and MOEST has no publishing unit with experience in publishing textbooks, teachers' guides, reading books, or other TLMs. The most important publishing experience in the country, particularly in local languages, lies with SIL. Over the years, SIL has provided local language alphabet books, primers, sentence books, and reading books in 27 local languages to a limited number of schools and communities to support local language literacy, often on its own initiative. Much of SIL's output is based on template publishing in which a standard structure, content, and set of common illustrations is

translated or lightly adapted into different languages, with minimum changes to the illustrations in order to keep costs as low as possible. At the MOEST workshop on the development of a National TLM Policy,¹⁸⁸ many of the participants expressed some reservations about the ability of template-based publishing to genuinely reflect Sudan's linguistic and cultural diversity and suggested that, in some subjects, uniquely commissioned text and illustrations might be necessary to achieve this. The use of templates could be an effective strategy in minimizing costs and supporting undeveloped local authorship and publishing capacity. The combination of template book approaches to reading book development for stories and topics that are not closely linked to individual cultures along with unique authorship for cultural/language specific topics is a possible solution. However, too much template book publishing could undermine opportunities for local language authorship.

Interviews with MOEST and SIL indicate that there is some educational authorship and translation capacity for primary textbooks and reading books in 37 of the local languages, though considerable authorship and translation training and support is needed.¹⁸⁹ It is reported, but not yet confirmed, that MOEST will develop their pre-school and primary materials in English and then translate them into selected local languages. If this approach is confirmed, it will underline the importance of local language translation training. However, given capacity, it would be difficult for SIL to take on all educational publishing in local languages for the new curriculum. Publishers from Kenya and Uganda may be interested in bidding for courses and reading books in those local languages with significant print run possibilities. It may be difficult to obtain bids for small print runs, although there are tendering strategies that could make them more attractive to publishers. For instance, to facilitate local language materials, publishers could be required to bid for

¹⁸⁸ Read, N. (2014b). Draft National LTM Policy. Windosr: IEP for DFID/MOEST.

¹⁸⁹ Read, N. (2014).; Bayley & Burchell, (2014).

the development of new curriculum materials in the English language, with a requirement to also create local language editions using provided translations. The local language translations could be jointly the responsibility of MOEST/SIL, and publishers could be required to cover the translation costs as part of their bid submission prices. This approach would compensate for the current lack of local authorship and publishing capacity within the country. Commercial publishers working with local authors/translators has proven over many years to be an important factor in developing local authorship skills and capacity. On the basis of one reading book per student, P1 reading book print runs for the four largest local languages (Dinka, Nuer, Bari, and Zande) would range from 10,000 to 180,000 copies on the basis of current data. Some of South Sudan's local languages have populations in neighboring countries (e.g., Acholi in Uganda), but these may not provide large print run increases.

4.2 Printing

There are no commercial or state printing houses in South Sudan capable at present of handling the cost-efficient printing of educational materials at the required quality standards, though at least one local printer has recently been established in Juba. The DFID TLMs were all manufactured in South Korea after the application of international standard competitive procurement procedures. The textbooks used were those confiscated from a publisher who had been disqualified from bidding. The prices achieved were unusually low because the origination costs of typesetting, artwork, page design and layout were mostly completed without cost when the books were taken over by the MOEST. The only origination costs incurred were the costs of contracting a Kenyan publisher to complete the origination of incomplete textbooks. It is unlikely that these low prices can be maintained in bidding for new curriculum textbooks where all normal origination costs would have to be covered.

4.3 Procurement

UNICEF and DFID textbook and reading book provision projects used international procurement systems to procure the projects' TLMs. The required production specifications were stated in the bid documentation, though there has been no testing to ensure that the required specifications were delivered. These procurements did not directly involve MOEST, although it has been reported¹⁹⁰ that MOEST was frustrated by the slow speed and bureaucracy of the international procurement processes. It is not yet clear how the TLMs for the new curriculum will be financed or what future procurement policies will be established. The workshop for the development of the Draft National TLM Policy specified that the MOEST wanted to operate a "Competitive Monopoly" system of procurement. In this system, an international bid would be evaluated and selected for one textbook for each subject and grade, which would then become a monopoly textbook for the duration of the assumed classroom lifespan. In 2011, as part of the preparation for the DFID Textbook Project the MOEST and DFID established a mechanism jointly to select the reading books to be supplied to schools. One of the recommendations of the National TLM Policy Workshop was the need to find donor support to establish, train, and support a TLM Procurement Unit within MOEST. This has been approved in principle by MOEST but is yet to be implemented.

4.4 Distribution

South Sudan suffers from severe distribution problems for all TLMs intended for school deliveries. The major problems are shown in Figure 5.

¹⁹⁰ Bayley, C., and Burchell, K. (July 2015). *CKP End of Project Report*. London: CKP for DFID/MOEST.

Figure 5: Barriers to efficient TLM distribution

Barrier	Description
Insecurity	In addition to the difficulties encountered in the conflict states, tribal disputes and cattle rustling are also at their worst during the dry season. These contribute to an element of lawlessness. The staff of Spedag/Interfreight, who were responsible for the DFID distribution, had to contend with being robbed, attacked, beaten, and put in prison, plus attempts at breaking into their vehicles, etc. Overall, the number of incidents encountered during the DFID distribution were manageable but were an ever present concern especially as the delivery teams spent much time outside the range of mobile phone networks.
Difficult terrain, including lack of roads	Additionally, many of the states have large areas of marshland (e.g., Warrap, Unity, Jonglei, Western Equatorial, and Upper Nile) which inhibit convenient access. Forests also present a challenge in parts of the country. It is estimated that, in addition to the standard distribution problems listed here, up to 15% of schools could be classified as very difficult access. ¹⁹¹ There is only one road with a tarred surface in the whole country, from Nimule on the Uganda border to Juba. The majority of 'roads' are ungraded earth tracks, so it does not take much rain to close these tracks. In some states, long stretches of the road are also mined.
Severe rainy season	Climate conditions mean that the northeastern states have the shortest window for deliveries. For example, flash flooding can mean that dried river beds can turn into raging torrents. It is neither practicable nor cost effective to have delivery teams waiting for several days until the rivers subside and become passable to 4 x 4s, so alternative arrangements are necessary. Deliveries are often possible up to the end of August, but December to April should be considered the target TLM delivery window. However, this is also the period when all haulage activities for all commodities are concentrated, resulting in a shortage of suitable trucks as well as inflated prices.
School holidays	The major long school holiday over Christmas/New Year coincides with the dry season. Head teachers or their deputies often return to their villages, limiting their availability to accept and sign for deliveries.
High costs	Transporting and distributing goods by road, frequently the only option, is expensive given the wear and tear on vehicles, the price of imported fuel, and the numerous roadblocks/checkpoints requiring payment of 'fees' to be able to progress.
Unreliable EMIS data	Of particular concern was the number of primary schools for which no data was available, the accuracy of the enrollment data for many of the primary schools, confusion over school names, etc. The data on ALP Centers was particularly patchy.
Lack of management capacity	Management capacity is limited at both the national and state levels. School level administration is also weak. The lack of depth in management is reflected in poor forward planning and mitigation of anticipated consequences.
Transitory school population	There is a sizeable nomadic population in South Sudan made worse by the fighting which affects the collection of accurate enrollment data.
Warehousing	Commercial warehouse facilities now exist in Juba, but no facilities exist in the rest of the country to store TLMs. The MOEST are investigating the possibility of developing state warehousing as part of the implementation plan for the new curriculum.

¹⁹¹ Bayley and Burchell. Email to IEP. (2015).

Timing of deliveries is also a crucial factor. If all deliveries were compressed into the optimum period (i.e., the mid-point of the dry season), it would prove impracticable (because of insufficient transport vehicles) and would likely be disproportionately expensive. In some of the counties of Upper Nile and three of the northern counties of Jonglei, river boats have to be used in conjunction with 4x4s. Ironically, the longer into the dry season, the lower the rivers become, making them impassable to river traffic.

Speedag/Interfreight introduced GPS cameras for the delivery of books to schools as a means of proving that they had successfully delivered according to the specified delivery schedule. Although not 100% effective because of the inaccurate EMIS data which required frequent adjustments to the delivery schedule, it was a significant improvement in achieving accountable delivery at a modest cost. A picture was taken of the books with the school and the staff who accepted delivery in the background, and the camera added the GPS location to the image. The images were provided as proof of delivery for payment purposes.

There are no regional or national bookseller networks in South Sudan, and the MOEST currently lacks the resources, infrastructure, and management capacity to handle a national distribution of TLMs for their new curriculum. All of the above factors resulted in the material handling aspects of the DFID project being undertaken in Kampala, Uganda.

Montrose International has calculated that Charles Kendall and Partners (CKP)/Speedag achieved 83% successful delivery of the DFID supplies to schools despite the conflict and the other difficulties listed above. This was, however, a high cost exercise and took more than two years to complete. Considering the high costs and difficulties of book distribution in South Sudan, it makes sense to request durable specifications, long book life, and the provision of buffer stocks as part of the first delivery to reduce the frequency of distribution. The provision of complete school sets of reading books may be needed because of the practical impossibility and high costs of supplying individual titles as they become available.

Project consolidation and distribution costs from Mombasa, Kenya, to schools represented 75% of the total costs of manufacturing and delivery (production and delivery costs from South Korea were 25%). More accurate EMIS data will reduce the costs and operational difficulties associated with stock re-distribution. It should also be noted that losses in distribution and in school book care and management have a significant impact on system costs over time and that the delivery of books that are not well used in the classroom is a significant source of waste.

4.5 *Teacher Training Issues*

Many of the larger languages have primers and storybooks already in use to teach literacy in some communities across the country. Some teachers are trained, although many of these teachers are working as volunteers and have had very little recent training. Two of the major challenges facing the introduction of local languages as LOIs are (a) the absence of widespread teacher training in the local languages and (b) the limited printing and distribution of local language books to schools.

SIL has undertaken limited local language teacher training, sometimes in association with MOEST. In addition, PDF versions of over 1,000 titles for teaching literacy in local languages are available in SIL's archive. With appropriate funding and training, these could be put to use even before the new curriculum is implemented. It is difficult to estimate the costs of teacher training in local language upgrading because there is no agreement at present on the extent of the training required. The training currently ranges from a minimum of a 1–2-week course to a full-semester, residential course at a teacher training college.

Training in effective classroom usage of TLMs is also considered to be a high priority bearing in mind the current evidence that many teachers are reluctant to issue textbooks to their students even when they have sufficient stock. Teacher training in TLM management is estimated at 1–2 days per school provided by county-level education staff. The use of reading books in support of early literacy is also a topic for teacher training both in-service and pre-service.

4.6 Financing

Since at least 2007, all TLM supplies to schools have been financed by donors (UNICEF and DFID) and NGOs (SIL). It is not yet clear how the new TLMs required for the launch of the new curriculum in 2017/2018 will be financed. However, the MOEST has designated local language reading books as a priority.

Since 2014, the MOEST has established operational per capita budgets for schools. Our consultations and MOEST documents reviewed suggest that the primary capitation budget is US\$7,211.8 per year; the secondary budget is US\$14,397.9. In addition, there is an annual Girls' Education South Sudan (GESS) grant of US\$4,472 per year.

When these budgets were established it was not envisaged that they would include the costs of essential TLMs. The MOEST has therefore requested financial support from major donors for the provision of TLMs to support the new curriculum. The December 2015 workshop on the Finalization of the National TLM Policy has been requested to provide costed TLM proposals for budgets ranging from US\$10 million to US\$60 million. In 2016, there is still no source of funding guaranteed to provide the new curriculum TLMs.

4.7 School Management and Usage

Montrose International evaluated the DFID Textbook Project in 2014 and 2015. Selected results from surveying school book storage is described in Figure 6.

Stock management at the schools is very limited. While some schools report having stock management procedures in place, in reality they do not use a stock register to issue books, they perform very few stock counts, and books can be found placed in several areas of the school such as various stores or parts of storerooms, in classrooms, and in staff rooms, as well as in people's homes. This means that unless the storekeeper or head teacher fully cooperates and gathers all the books together on a regular basis, some books can easily be left out of the count. Losses and thefts cannot be traced and identified as most schools did not stamp and number the textbooks. One head teacher reported that project books were being sold in local markets. The latest evaluation report also identifies the causes of damage to textbooks. The three most common types of damage are (a) covers detaching from the book block, (b) wear and tear from normal classroom use, and (c) torn pages and covers resulting from misuse by students. Minor causes of damage were listed as (d) pest infestation and (e) water damage. Overall, after two years of use, 19% of

Figure 6: Book storage survey following Textbook Project.

Condition	Percent of schools meeting condition
Book stock stored in delivered boxes	78%
Books kept at house of staff or community member	25%
Any storage area	70%
Dedicated book-only storage	41%
Storage access limited for security	65%
Storage area sufficient to contain stock	65%
Storage area is clean	37%
Storage area infected with pests capable of damaging books	49%
Storage area protected against water penetration	55%
Storage area damp or show signs of water	6%

supplied books in the surveyed schools had been lost or damaged.¹⁹² This figure is on a par with school-level stock losses in many other SSA countries.

In July 2015, Montrose International reported that while many teachers use the teachers' guides and pupil textbooks to plan their lessons, almost no pupils had regular access to textbooks or reading books. Classroom observations reported only teachers with a copy of textbooks, even though sufficient stock was available for reasonable student sharing of the textbook. While most of the head teachers interviewed claimed that the presence of the TLMs in their schools had helped to improve the quality of teaching and learning, there was no evidence of this being the case. If support and training is not provided to the teachers with additional support from payams and counties, then textbooks are likely to be used less and less in classrooms as stock levels drop and teachers who have had some training retire, leave teaching, or move due to instability. It is a cause for some concern that many of the teachers interviewed have only been in teaching for a year or two and are not trained, being mostly secondary school leavers. These teachers may have even less knowledge of how to use books in their lessons than those teachers they are replacing.

Additionally, usage of books in ALPs has been challenged by a transient population and fear that issued textbooks would not be returned. While English books were sometimes loaned out, some schools allowed older students to take upper primary books home, and occasionally better-off parents photocopied the textbooks to provide resources at home. Schools usually did not lend due to fear of loss or damage despite all schools reporting community demand for the books. Most teachers reported using the teachers' guides, and some brought textbook sets to class and then collected them back at the end of the day.

It is clear that addressing issues of TLM usage is essential, but the costs of improving school usage of TLMs is uncertain. Few pre-service teacher training courses provide instruction and guidance to teachers

in training on this key issue, and in-service courses are expensive and tend to have outcomes that are difficult to monitor.

A GBF could possibly design teacher training components in textbook usage and school-based TLM management systems as well as training courses to help address limited usage and TLM management challenges.

4.8 Digital Opportunities

There are no digital-format primary reading books available in English or in local languages, although SIL maintains local language reading books in PDF format as part of its archive (as described in Section 4.9).

As shown in Figure 7, only 2.5% of schools currently have access to electricity. In addition, there is little or no computer hardware in primary schools, although there is a small NGO-funded project¹⁹³ that is piloting the use of tablets. Even in Juba, Internet connectivity

Figure 7: Number and % of primary schools with and without access to electricity by state, 2015

State	Schools	Access		No access	
		Count	% total	Count	% total
CEQ	566	46	8.1%	520	91.9%
EEQ	327	9	2.8%	318	97.2%
LAK	347	5	1.4%	342	98.6%
NBG	557	2	0.4%	555	99.6%
WAR	524	5	1.0%	519	99.0%
WBG	211	5	2.4%	206	97.6%
WEQ	380	7	1.8%	373	98.2%
JON	138			138	100.0%
UNI	72			72	100.0%
UPN	1			1	100.0%
Total	3,123	79	2.5%	3,044	97.5%

Source: MOEST Education Statistics 2015

¹⁹² Montrose International. (July 2015). *Evaluation of the DFID-Funded South Sudan Textbook Project – Assessment Report, Year 2*. DFID for MOEST.

¹⁹³ War Child International. (2015). *Vision*. Retrieved 2016, from <http://www.warchild.org/vision>

is very patchy, and for much of the country it is not available at all. Under these circumstances there is little possibility of using digital reading books on any significant scale in the short or even medium term.

4.9 Reading Book Inventory

During the in-country study, SIL provided an inventory of early grade reading books developed in South Sudan in a number of different local languages and shared over 100 titles in 25 South Sudanese local languages.¹⁹⁴ Each language was separated into categories ranging from (a) ABC Book, (b) ABC Chart, (c) ABC Storybook, (d) Translation Primer, (e) Easy Reading Book, (f) Spelling Guide. Please see Appendix 2 for a full list of SIL's electronic archive.

SIL is currently exploring setting up a unit to lease copyrights in these materials to interested publishers. In the event that any of the SIL titles now or in the future will be submitted for competitive bidding, there will be a mechanism in place by which successful publishers can have access to SIL materials. The inventory is also available in Appendix 2.

5. Discussions and Opportunities for a Global Book Fund

Given the planned introduction of a new curriculum in 2017/2018 using local LOIs in pre-schools, grades P1-3, and ALP grades L1 and L2 combined with the current lack of local language materials, there could be strong demand for GBF support in three key areas:

(i) Provide funding for local language reading books to support government demand and priorities.

MOEST clearly stated in our consultations that local language textbook, teachers' guide, and reading book development and supply were their highest current priorities. The financing mechanism for the new TLMs is not yet decided, thus there is no indication as yet regarding what level of financial contributions could be expected from government or from donors/NGOs. In a country as poor as South Sudan, significant

parental contributions are not to be expected. It is thus too early to draw conclusions about the potential sustainability of any GBF investments in local language reading books in South Sudan.

The government of the Republic of South Sudan (GORSS)/MOEST policy is to use all local languages as LOIs eventually, but this is unlikely to be achieved easily or quickly. The policy is likely to be launched with only a limited number of local languages as LOIs. While no final decision on the selected launch languages is currently available, it is likely that those languages supported by the USAID project – Dinka, Nuer, Bari, Zande, and Toposa – will be priorities. All local languages in South Sudan, including the priority languages listed above, are underserved languages in terms of the ready availability of decodable and levelled reading books to support literacy and the development of a lifelong reading habit.

The provision of English language reading books is also a MOEST priority because of the need to develop students' English language competence as the basis for effective transition to English as the LOI from P4 onwards.

(ii) Provide technical assistance to address emerging need for training and support.

When the local LOIs have been selected by the MOEST, there will be an urgent need for training and support to potential local language authors/translators in language, authorship, and translation skills. Final manuscripts can be tendered for publishing, and successful publishers could be required to provide additional authorship support as part of the publishing process. Experience from other countries (e.g., Uganda) has demonstrated the importance of teacher training in the local languages selected as LOIs, in order to ensure effective use of the provided TLMs.

The DFID Textbook Project has been successful in providing adequate school storage facilities for TLMs in around 70% of schools and in most counties. However, additional and ongoing training is widely

¹⁹⁴ Materials available upon request.

required in the school management of TLMS and their effective use in the classroom. Without this training and support, there is a risk that the investment in local language reading book provision could be wasted.

(iii) Assist in strengthening in-country infrastructure for distribution, including improved EMIS data collection.

There is no significant bookseller network in the country, and parental affordability for local language reading books outside Juba is considered to be negligible. Thus the school market represents the most significant market for the provision of local language reading books in support of literacy upgrade and student achievement. In order to reach the national school market, distribution will need to be tendered to an experienced consolidator/hauler, but the costs and difficulties of distribution in South Sudan suggest that complete sets of local language reading books should be supplied at one time and that durability and long classroom life should be factors to reduce the frequency of distribution as much as possible. However, effective distribution will require far more accurate data on the location of schools, their grade level enrollments, and the languages spoken and preferred. Importantly, this needs to be available by mid-2016 if local languages as LOIs are to be launched in 2017/2018.

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7. Appendix

7.1 Appendix 1: Interview List

Organization	Contact
Charles Kendall and Partners	Charles Bayley and Keith Burchell
DFID South Sudan	Richard Arden
Leaves Bookshop	Awak Bios
Ministry of Culture, Youth and Sport	Agum Ria Mabeng
Ministry of Education, Science and Technology	Michael Lopuke Lotyam (Under-Secretary)
Montrose International	Martin Prew, Janice Moore, Elizabeth Onyanga ¹⁹⁵
Save The Children	Lizzie Rushwaya and Julie Finder
Speedag Interfreight	
Summer Institute of Linguistics	Tanya Spronk
UNESCO South Sudan	Abdhi Dohir Osman
UNICEF South Sudan	Tizie Maphalala
USAID South Sudan	Christine Djondo
Visits to two Primary Schools	Headteachers and teachers
War Child Holland	
Windle Trust	Peter Ale

¹⁹⁵ Undertaking Impact Evaluation for DFID textbook project and literacy work for UNICEF.

7.2 Appendix 2: Literacy Materials¹⁹⁶

As part of the SIL South Sudan Electronic Archive¹⁹⁷ – June 2015

For more information, contact: education.ssudan@sil.org

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Acholi	Alphabet Book	CAKO KWAN ILEB ACOLI	Acholi Alphabet book	No	Trial	Khartoum Workshop Programme
Acholi	Health Book	Two Jonyo	HIV/AIDS	No	Trial	Sudan Council of Churches
Acholi	Miscellaneous	TE KWARO PA ACHOLI ME SUDAN	Acholi History, Cultures and Believes in the Sudan	No	First	Sudan Workshop Programme
Acholi	Numeracy	Cura me 1 - 10	Arithmetic 1 - 10	No	Second Trial	SIL-South Sudan
Acholi	Numeracy	Kwano 1-10	Counting 1-10	No	Trial	Khartoum Workshop Programme
Acholi	Primer	Buk me Acel i Leb Acoli	Acholi Primer	Has	Second Trial	SWP
Acholi	Primer	Yubo Kit me Pwonyo Buk Kwan me Acel	Teacher's Guide	Is	Trial	Sudan Workshop Programme
Acholi	Sentence Book	Lok ikom pur	Cultivation	No	Trial	Khartoum Workshop Programme
Acholi	Sentence Book	Lok ikom Mako Rec	Fishing	No	Trial	Khartoum Workshop Programme
Acholi	Sentence Book	Lok ikom Dwar	Hunting	No	Trial	Khartoum Workshop Programme
Anuak	Alphabet Book	Wëël Tāk Gör Dha Anyuua	Anyuua Alphabet Book	No	Second Trial	Khartoum Workshop Programme
Anuak	Alphabet Chart	Wëël tāk Gör Dha Anyuua	Anyuua Alphabet Chart	No	Second Trial	KWP
Anuak	Alphabet Story Book	Wëël Waac	Alphabet Story Book	No	Trial	Sudan Workshop Programme
Anuak	Easy Reader	Kuutø Wëël Waac ki Dha Anywak	Co-operate	No	Second Trial	Sudan Workshop Programme
Anuak	Health Card	Dwadø	Dehydration	No	Trial	Sudan Workshop Programme
Anuak	Health Card		General Hygiene	No	Trial	Khartoum Workshop Programme
Anuak	Health Card	Ø manynya jööt dëël bëët	Health & Disability	No	Trial	Sudan Workshop Programme
Anuak	Health Card		HIV/ AIDS 1	No	First	Sudan Workshop Programme
Anuak	Health Card		HIV/ AIDS 2	No	First	Sudan Workshop Programme
Anuak	Health Card		HIV/ AIDS 3	No	First	Sudan Workshop Programme
Anuak	Health Card		HIV/ AIDS 4	No	First	Sudan Workshop Programme

¹⁹⁶ This list includes church-related materials.

¹⁹⁷ Some other materials are in the process of being put in the archive. This list includes materials that are "Trial edition" and those which are not "Print Ready" but are still in the archives.

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Anuak	Health Card	Bëët dhano ki jøø paare	Natural Family Planning	No	Trial	Khartoum Workshop Programme
Anuak	Health Card	Gwøk mīio	Safe Motherhood	No	Trial	Khartoum Workshop Programme
Anuak	Health Card	Tāwe møk mo wo muuø	Other Sexually Transmitted Diseases	No	Trial	Sudan Workshop Programme
Anuak	Health Card	Lak	Teeth	No	Trial	Sudan Workshop Programme
Anuak	Health Card	Wøpe	Youth	No	Trial	Sudan Workshop Programme
Anuak	Liturgy	Lam ma Teengi	Prayer Book	No	Second Trial	Anywaa Congregation
Anuak	Numeracy	Kwään 1 - 10	Counting 1-10	No	Trial	Khartoum Workshop Programme
Anuak	Sentence Book	Wëël Waac	Alphabet Story Book	No	Trial	Sudan Workshop Programme
Avokaya	Alphabet Book	Búkū Tā Īgī Kā	Avokaya Alphabet Book	No	Third	Institute of Regional Languages
Avokaya	Alphabet Story Book	Í'dígówá Āvōkáyā kâ	Avokaya ABC Story Book	No	First	Institute of Regional Languages
Avokaya	Sentence Book	Ōké ǎ'ú bê	Dog and Hen	No	Trial	SIL
Baka	Alphabet Book	BÛKÛ KÍÉ'DO Tonózé mu ólo ledre	Book One Let's Begin to Read	Has	Second	SIL-South Sudan
Baka	Alphabet Book	Mizefj Búkū Tonózé mu ólo ledre Búkū 'bi sáká 'yí 'dódo ledre	Baka Book One Let's Begin to Read Teacher's Guide	Is	Trial	Baka Language Committee
Baka	Alphabet Chart	Létera 'bitara Baká e	Baka alphabet chart	No	First	SIL
Baka	Alphabet Story Book	Mikánda Búkū Cíka 'Bi Létera 'Bi Baká E	The New Baka Alphabet Storybook	No	First	SIL-South Sudan
Baka	Easy Reader	Búkū Cíka 'bi Baká e	Baka Story Book	No	Trial	Khartoum Workshop Programme
Baka	Folktales	BÛKÛ 'BÍ CÍKA	Folk Story Book in Baka	No	Trial	SIL-Sudan
Baka	Folktales	BÛKÛ 'BÍ CÍKA	Storybook in Baka	No	Trial	SIL-Sudan
Baka	Health Book	Ledre gi ro Miyáká	Miyaka's story; How a community can love and care for people affected by AIDS	Has	Trial	SIL-Sudan
Baka	Health Book	Lúru Bi Kací Owú Kí Simikowo	Treating Diarrhea In Children	No	First	SIL
Baka	Health Book	Ledre gi ro Miyáká Búkū zí 'yí 'dódo ledre	Miyaka's Story Facilitator's Manual	Is	Trial	SIL-South Sudan
Baka	Health Book	Bándá Ro 'Yí Gí Zí Bilériza	How To Avoid Bilharzia	No	First	SIL
Baka	Health Card	Árá	Birth	No	Trial	Sudan Workshop Programme
Baka	Health Card	úlu umba	Breast-feeding	No	Trial	Sudan Workshop Programme

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Baka	Health Card	Djhidjrésonj	Dehydration	No	Trial	Sudan Workshop Programme
Baka	Health Card	Lede giro lúru bi kací 'be 'bi ezé kí owú 'bi ezé	General Hygiene	No	Trial	Khartoum Workshop Programme
Baka	Health Card	Ili zize idíze mbá kí bilámá simiro	Health & Disability	No	Trial	Sudan Workshop Programme
Baka	Health Card	Mingbóro owú simi	The Growth of the Baby in the Womb	No	Trial	Sudan Workshop Programme
Baka	Health Card	Ndrába Mindíki Owú	Natural Family Planning	No	Trial	Khartoum Workshop Programme
Baka	Health Card	Mi'doro mbagí owú	Safe Motherhood	No	Trial	Khartoum Workshop Programme
Baka	Health Card	So e	Teeth	No	Trial	Sudan Workshop Programme
Baka	Health Card	Éyí e gi ro mindíki owú, kí mingbóro owú simi mizefj simibi	Needs at Birth, and Development in the First Year	No	Trial	Sudan Workshop Programme
Baka	Health Card	Mbámiowu	The Pregnant Mother	No	Trial	Sudan Workshop Programme
Baka	Health Card	Owú phiřangá e	Youth	No	Trial	Sudan Workshop Programme
Baka	Liturgy	BÚKU 'BĬ INI	Baká Prayer Book	No	Trial	Khartoum Workshop Programme
Baka	Liturgy	BÚKU 'BĬ INI Zí	Baka Prayer Book	No	Third	Diocese of Maridi, Episcopal Church of the Sudan
Baka	Numeracy	Tánga éyí 1 - 10	Counting 1-10	No	Trial	Sudan Workshop Programme
Baka	Primer	GBRE BÚKU	Baka Book 2 (Old Series)	Has	Trial	Baka Language Committee
Baka	Primer	Gbre Búkú	Baka Book 2 (New Version)	No	First	SIL
Baka	Primer	Ota Búkú	Baka Book 3 (New Series)	No	Trial	SIL
Baka	Primer	ESO BÚKU	Baka Book Four (Old Series)	Has	Trial	Baka Language Association
Baka	Primer	OTA BÚKU	Baka Book Three (Old Series)	Has	Trial	Baka Language Association
Baka	Sentence Book	Ísĭ E Kř Ngono	Dog and Hen	No	First	SIL-Sudan
Baka	Sentence Book	'Be 'bi Ndotó	Ndotó's Home	No	Trial	SIL
Baka	Sentence Book	Sĭ 'boro 'be 'bi Makiři	The Blacksmiths Shop	No	Trial	SIL
Baka	Songbook	IRĭ 'BÚŽÉ LOMO IDĭ MĭMBÓFONÉ	Baka Hymnbook	No	First	Baka Language Association
Baka	Transition Primer	MfÓLO TARA BAKÁ Kĭ MĭÉKÉ A	Reading and Writing Baka	No	First	Baka Language Association
Bari	Alphabet Book	Jujumbu Kendya Ko Bari	Bari Alphabet Book	Has	Third	SIL

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Bari	Alphabet Story Book	LIKIKIRILÖN TI KONYEN TI MANINI KO KUTUK NA BARI	Bari Alphabet Story Book	No	Third	SIL
Bari	Bible Story	Dun a Lungu Abarama - Gwiliŋet lo Abarama 1	The Call of Abram	No	Trial	SIL
Bari	Bible Story	Abarayama A Tema Ko Dun - Gwiliŋet Lo Abarayama 3	God Tests Abraham	No	Trial	SIL
Bari	Bible Story	Yesu A Tunyöju Dutu Alipan Mukanat.	Jesus Feeds the Five Thousand	No	Trial	SIL
Bari	Bible Story	Duto lo Samaria Lo'but	The Good Samaritan	No	Trial	SIL
Bari	Easy Reader	Buk Nio Kenet-Buk Na Kijakwa-Buk Tomurek	My Animal Story Book	No	First	IRL and SIL
Bari	Easy Reader	Sukuri Kajamanit - Ko Kulye Likikirilön Tupet Togelen	Talking Cock, Part One	No	Fourth	SIL
Bari	Easy Reader	Likikirilön lo ŋarakindya todinö na kurundyö na kendya	Stories to help teach comprehension	No	Trial	Sudan Workshop Programme
Bari	Easy Reader	Sukuri Kajamanit - Ko Kulye Likikirilönön Tupet Tomurek Möriet	The Talking Cock and other stories part 2	No	Second	SIL
Bari	Primer	Buk na Katodinönit na Jujumbu Kendya Ko Bari Buk Suluet Ko Buk Togelen	Teacher's Guide to Learning to Read Bari ABC & Book 1	Is	Trial	SIL
Bari	Primer	Jujumbu Kendya Ko Bari Buk Tomusala - Buk Ludukötyo	Learning to read in Bari Book 3	No	Ninth	Institute of Regional Languages
Bari	Primer	Jujumbu Kendya Ko Bari Buk Togelen - Buk Ludukötyo	Learning to Read in Bari, Book One	Has	Third	SIL
Bari	Primer	Jujumbu Kendya Ko Bari Buk Tomurek Buk Ludukötyo	Learning to Reading in Bari Book Two	Has	First	Institute of Regional Languages
Bari	Primer	Jujumbu Kendya Ko Bari Buk Tomurek Buk na Katodinönit	Teacher's Guide to accompany Learning to Read in Bari Book Two	Is	Third	Institute of Regional Languages
Bari	Sentence Book	Buk Nio Kenet Na Konyen Ti Manini	ABC Sentence Book	No	Trial	SIL-Sudan
Belanda Bor	Alphabet Book	Boko Ni Nyi Ke'do Ki Di Bor	Belanda Bor Alphabet Book	No	Trial	SIL
Belanda Bor	Bulletin	Funji		No	Trial	
Belanda Bor	Easy Reader	Ti Fogi Faci yi ka Nyoko ki ka Ley	Why the Animals Separated from Human Beings	No	Trial	Khartoum Workshop Programme

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Belanda Viri	Alphabet Book	GIRI WA YI JI MVE YU YI	ABC Book Teachers Guide	Is	Second	IRL
Belanda Viri	Alphabet Book	Kpaa Wa Ka Vomvo ta Njo Belanda Viri	Belanda Viri ABC Book	Has	Third	IRL
Belanda Viri	Alphabet Chart		Belanda Viri Alphabet Chart	No	Trial	SWP
Belanda Viri	Alphabet Story Book	Murukpáá Wá Ká Vomvó Ta Gbí Só Ta Njo Vĩřĩ Vă-njeě	Alphabet Sentence Book, Part 1	No	Trial	Sudan Workshop Programme
Belanda Viri	Language Learning	Gĩřĩ 'Bá Vĩřĩ	A Way To Viri Home	No	Trial	Sudan Workshop Programme
Beli	Alphabet Book	Buku Topa Kpa Yi'běli	Jur Beli ABC Book	No	Second	SIL
Beli	Alphabet Story Book	Topa Komo Buku Kpa Yi'běli	Jur 'Beli Alphabet Storybook	No	Trial	SIL
Beli	Bible Story	Mutu Yěcu Luka 1:26-38, 2:1-20	Luke 1:26-38, 2:1- 20 in the Jur 'Běli language of Sudan	No	Trial	Khartoum Workshop Programme
Beli	Bible Story	Hõñĩ Camariya Bole Luka 10:25-37	Luke 10:25-37 in the Jur 'Běli Language of Sudan	No	Trial	Khartoum Workshop Programme
Beli	Bible Story	Yěcu Jojo mono Lonji ka Yěcu A gobe Diga Cotani	Luke 11:1-36 in the 'Beli language of Sudan	No	Trial	Sudan Workshop Programme
Beli	Folktales	Buku Komo Kpa Yi'běli	Jur 'Beli Story Book	No	Second Trial	SIL
Beli	Grammar Write-Up		'Beli Grammar Book	No	First	SIL - South Sudan
Beli	Sentence Book	Do'bolo Mą a Gawo	Dobolo Goes to Town	No	Trial	SIL
Beli	Sentence Book	Měgi Kaya	Kaya's Activities	No	Trial	SIL
Beli	Sentence Book	Akora Kpili Bohi	The Little Red Hen	No	Second Trial	SIL
Beli	Sentence Book	Bĩĩ Ką Bę Monɔ ɔ Wayi?	What Does a Dog Like to Do?	No	Second Trial	SIL
Beli	Sentence Book	Do'bolo bę monɔ ɔ wayi?	What Does Dobolo Like to Do?	No	Trial	SIL
Beli	Writing Principles		Reading and Writing 'Beli Book 2	No	First	SIL - South Sudan
Bongo	Alphabet Book	Mingo Ndũũ Bõngõ	Bongo Alphabet Book	No	Second	SIL
Bongo	Alphabet Chart	Langba 'ba mingo ndũũ	Bongo Alphabet Chart	No	Fourth Trial	SIL
Bongo	Alphabet Story Book	Matiyo Mingo Ndũũ Bõngõ	Bongo Alphabet Story Book	No	Second	SIL, South Sudan
Bongo	Bible Story	Mitiyo Mu'ju 'ba Yecu, Luka 1:26-38, 2:1-20	Luke 1:26-38, 2:1- 20 in the Bongo language of Sudan	No	Trial	Sudan Workshop Programme
Bongo	Bible Story	Miku Dohogo Fir 'Ba Jeki Camariya Luka 10:25-37	Luke 10:25-37 in the Bongo Language of Sudan	No	Trial	Sudan Workshop Programme

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Bongo	Bible Story	Yecu di tiyo bilehi na Yecu na kamakitigo aduu Cítani	Luke 11:1-36 in the Bongo language of Sudan	No	Trial	Sudan Workshop Programme
Bongo	Bible Story	Nôha	Noah	No	Second Trial	SIL
Bongo	Easy Reader	Matiyo 'Bo Gi Baangee	Animal Stories	No	Trial	Khartoum Workshop Programme
Bongo	Easy Reader	Matiyo 'ba Bongo	Bongo Story	No	Trial	Sudan Workshop Programme
Bongo	Easy Reader	Mila 'ba Migbodo 'ba loki-'jĩĩ	Community Development	No	Trial	SIL
Bongo	Easy Reader	A'ji Kpaw na Komo ba ka Jëkéë	Anything is good for Him	No	Trial	Khartoum Workshop Programme
Bongo	Easy Reader	Bituta dokomo fir Pito hĩ ji 'bi kendi	Teaching Guide for Punctuation	Is	Trial	Sudan Workshop Programme
Bongo	Easy Reader	Ye matiyo na, na akpi bi këndĩ bi mohitu hifir	Stories to help teach comprehension	No	First	Sudan Workshop Programme
Bongo	Easy Reader	Bituta dokomo fir	Punctuation	Has	Trial	Sudan Workshop Programme
Bongo	Easy Reader	Bituta dokomo fir Njĩĩ ndobo	Punctuation Workbook	Has	Trial	Sudan Workshop Programme
Bongo	Folktales	Mitiyo 'ba Gibaangee	Bongo Folktales	No	Trial	SIL
Bongo	Folktales	Matiyo Di'ba Lu'ba	Historical Stories	No	Trial	SIL
Bongo	Grammar Book	Bongo Grammar Book		No	Trial	SIL
Bongo	Health Card	Mu'jũ	Birth	No	Trial	Sudan Workshop Programme
Bongo	Health Card	Bilu gĩmaa-na maya	Breast-feeding	No	Trial	Sudan Workshop Programme
Bongo	Health Card	Bitu mbili bi gĩmaa	Child Care	No	Second Trial	Sudan Workshop Programme
Bongo	Health Card	Ndöcĩ	Dehydration	No	Trial	Sudan Workshop Programme
Bongo	Health Card	Jë kpaw ro'bu a mai na hĩĩ. Jë ro'bu hĩĩ kpawga.	Health & Disability	No	Trial	Sudan Workshop Programme
Bongo	Health Card	Bigũ hĩĩ	Immunization	No	Second Trial	Khartoum Workshop Programme
Bongo	Health Card	Bila gĩmaa hi rüũ gĩmaa	The Growth of the Baby in the Womb	No	Trial	Sudan Workshop Programme
Bongo	Health Card		Children Need to Play	No	Second Trial	Khartoum Workshop Programme
Bongo	Health Card	Bi nyu jëkĩ a 'ji mony	Nutrition	No	Second Trial	Khartoum Workshop Programme
Bongo	Health Card	'Jökö.	Teeth	No	Trial	Sudan Workshop Programme
Bongo	Health Card	A'jina da ro'boo ro mu'jũ	Needs at Birth, and Development in the First Year	No	Trial	Sudan Workshop Programme

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Bongo	Health Card	Mbaga na maa	The Pregnant Mother	No	Trial	Sudan Workshop Programme
Bongo	Health Card	Muu bu'dee na muu ngajee	Youth	No	Trial	Sudan Workshop Programme
Bongo	Numeracy	A'ji dada 1 - 10	Arithmetic 1 - 10	No	First	Sudan Workshop Programme
Bongo	Numeracy	A'jidada 3 Njĩindobo	Arithmetic 3 Workbook	No	Trial	Sudan Workshop Programme
Bongo	Numeracy	A'ji dada 2	Arithmetic 2	No	First	Sudan Workshop Programme
Bongo	Numeracy	A'ji dada 3	Arithmetic 3	No	First	Sudan Workshop Programme
Bongo	Numeracy	Bida a'ji 1-10	Counting 1-10	No	Second	SIL, South Sudan
Bongo	Pre-Primer	Kor Bingofir	Before Writing	No	Trial	Sudan Workshop Programme
Bongo	Primer	Njĩ bida fir gbana bingo fir	Reading and writing book	No	Second Trial	Sudan Workshop Programme
Bongo	Primer	Nji mingo Dada Kotu	Bongo Primer	Has	Second Trial	Sudan Workshop Programme
Bongo	Sentence Book	Küngü	Baboon	No	Trial	Sudan Workshop Programme
Bongo	Sentence Book	Bilu gimaa na maya	Breast-feeding	No	Trial	Sudan Workshop Programme
Bongo	Sentence Book	Bi nja kinji	Catching fish	No	Trial	Sudan Workshop Programme
Bongo	Sentence Book	Ana Kaaru	This is a Bucket	No	Second Trial	SIL
Bongo	Sentence Book	Ndobo 'ba nyaka	Work in the Fields	No	Second Trial	Sudan Workshop Programme
Bongo	Sentence Book	'Bëë je	My home	No	Trial	Sudan Workshop Programme
Bongo	Sentence Book	Mbaga Muu	Mother of Children	No	First	Sudan Workshop Programme
Bongo	Sentence Book	Ma	Myself	No	Trial	Sudan Workshop Programme
Bongo	Sentence Book	Yeki ka 'biye a'ji na?	Who owns this thing?	No	Trial	Sudan Workshop Programme
Bongo	Sentence Book	Loki a'jitutu	Plants	No	Trial	Sudan Workshop Programme
Bongo	Sentence Book	Ndere 'ba Cugu	Going to the Market	No	First	Sudan Workshop Programme
Bongo	Writing Principles		Reading and Writing Bongo	No	Second Trial	
Didinga	Alphabet Book	Abbacca cĩ 'Thoureetu Dĩdĩngayyi	Alphabet Book	No	First	SIL-Sudan
Didinga	Alphabet Chart	Abacca Dĩdĩngayyi	Didinga Alphabet Chart	No	Third	SIL
Didinga	Alphabet Story Book	'Buuk cĩ Dtēēllēn cĩg Abacca Dĩdĩngayyi	Didinga Alphabet Story Book	No	Third	SIL-Sudan
Didinga	Bible Story	'Thēccan cĩ Aadamĩ hĩ Ēēvva	The Man and Woman Sin	No	Second Trial	SIL-South Sudan

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Didinga	Bible Story	Ėhēnyta Nyekuci Hēētkujjien hī Looc	The Creation of Heaven and Earth	No	Second Trial	SIL-South Sudan
Didinga	Easy Reader	Tūhūlūc 'cī Hidici 'cī Marihi	The Little Red Hen	No	First	SIL
Didinga	Folktales	Nyepite cī Dīdīnga	Didinga Cultural Stories	No	First	Sudan Workshop Programme
Didinga	Folktales	Buk cī dteellenu	Didinga Storybook	No	First	Summer Institute of Linguistics
Didinga	Folktales	'Buuk 'cī Dteellenu Didingayyi	Storybook in Didinga	No	Trial	SIL Sudan
Didinga	Health Book	Dtēēllēn cīg Nappūūlī cieegi	Nappūūlī's Story	No	Second Trial	SIL
Didinga	Primer	Thōōth cī Dīdīnga 'Buuk 1	Didinga Language Primer 1	No	Second Trial	SIL
Didinga	Sentence Book	P2 'Buuk cī Hallimanī Nyepite, Dhōōrīt cī Tīn 6, Hattiboolan 'Gēēn	P2 Social Studies Reader, Unit 6, Planting Food	No	Trial	SIL, South Sudan
Didinga	Sentence Book	Dtiicanī cīg Aporu	Aporu's Activities	No	First	SIL Sudan
Didinga	Sentence Book	Būhēēc 'cī hāī Natiki 'cieeni	This is a girl called Natiki	No	Second	SIL Sudan
Didinga	Sentence Book	Ne gōōng cī adīman ūthūrī?	What does a dog like to do?	No	Second	SIL - Sudan
Didinga	Sentence Book	Eet Cīg Halangtōō Cannī Cieegi	P1 Social Studies Reader, Unit 4, These Are My Family Members	No	Trial	SIL, South Sudan
Didinga	Sentence Book	P3 'Buuk cī Hallimanī Nyepite, Dhōōrīt cī Tīn 5, Duhunanīt Cī Loholeeco	P3 Social Studies Reader, Unit 5, The Ceremony of the Newborn Child	No	Trial	SIL, South Sudan
Didinga	Writing Principles	Occa agiili nē eteheedu Didinga jurrung?	Can you read and write Didinga well?	No	Third Trial	SIL-Sudan
Dinka Cam	Alphabet Book	Buṇ de Cīīt ke Thuonjāṇ	Alphabet Book	No	Sixth	SIL-South Sudan
Dinka Cam	Alphabet Chart	Cīīt ke Thuonjāṇ	Dinka Alphabet Chart	No	Second	Dinka Cam OT. Bible & Literacy Project
Dinka Cam	Alphabet Story Book	Buṇ de Akōkōōl ke Cīīt ē Thuonjāṇ	Alphabet Story book	No	Second	SIL-South Sudan
Dinka Cam	Bible Story	Dhiēnh de Mothe	Birth of Moses	No	First	South Sudan Workshop Program
Dinka Cam	Bible Story	Cō t de Abram	Call of Abram	No	First	South Sudan Workshop Program
Dinka Cam	Easy Reader	Buṇ Tueeṇ De Ciēēr	Dinka Primer	No	Fifth	SIL-South Sudan
Dinka Cam	Easy Reader	Cīīt ke Gō t	Punctuation	No	First	SWP
Dinka Cam	Folktales	Akōkōōl ke Jiēēṇ	Dinka Folktale Stories	No	Trial	SIL-Sudan

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Dinka Cam	Health Book	Akōkōl de Abuk: lēu bē Akutnhom de kōc cē narj Adarwal (AIDS) nhiaar ku bē keek..	Abuk's Story: How a community can love and care for people affected by AIDS	No	Trial	SIL-Sudan
Dinka Cam	Miscellaneous	BUḐ DE ROU DE KẼ Ḑ KE JİẼḐ	Proverbs	No	Trial	Khartoum Workshop Programme
Dinka Cam	Primer	Buḥ Tueej de KuẼ n de Thuonjāḥ	Primer 1, Part 1	No	Trial	SIL-Sudan
Dinka Cam	Sentence Book	P1 Buḥ de Piōōc de Ka ke Pinynhom, Athōōr 4, Yōōc Thuuk	P1 Science Reader, Unit 4, Buying at the market	No	Trial	SIL, South Sudan
Dinka Cam	Sentence Book	Anyaar	Buffalo	No	First	SIL-Sudan
Dinka Cam	Sentence Book	Rē c	Fish	No	First	SIL-Sudan
Dinka Cam	Sentence Book	AluẼl Thiin de Ajīth	The Little Red Hen	No	First	SIL South Sudan
Dinka Cam	Sentence Book	Piōōc de Akōkōl Ciek yiic	Sight word stories	No	First	SIL Sudan
Dinka Cam	Sentence Book	Ciēḥ de Alē th	Wearing Clothes	No	First	SIL
Dinka Cam	Scripture Use	Buḥ de Dō c de Arēem de Tōō k de Piō u: Lēu bē Kanitha Yaa Kony Yedī?	Healing the Wounds of Trauma: How the Church Can Help	No	Trial	SIL
Dinka Cam	Scripture Use	Dhōl de Luāk	The Way of Salvation	No	Second	SIL-Sudan
Dinka Languages	Post-Primer	Dē t Yic Muōōc Ku Tiēk	Understanding Gender	No	Trial	Salmmah Women's Training and Documentation Centre
Dinka Padang	Miscellaneous	Kāu ē Jiēēḥ	Jieng Culture	No	Trial	Sudan Workshop Programme
Dinka Rek	Alphabet Book	THUḐJĀḐ ATHÖR Ē KĪT	Dinka Alphabet Book	No	Trial	Khartoum Workshop Programme
Dinka Rek	Easy Reader	Kāāḥ ē Majōk Ku Wēl Kō k	Majok Story And Other Stories	No	Trial	Sudan Opening Learning Organization
Dinka Rek	Easy Reader	Jāl Muōnyjāḥ Alōḥ Cuēc Bik La Alōḥ Cam Thudān	Dinka Displacement To The Northern Sudan and Other Stories	No	Trial	Sudan Open Learning Organization
Dinka Rek	Easy Reader	MAANY Ē Jiēḥ	Dinka Poems	No	Second	Dinka Literacy Project
Dinka Rek	Easy Reader	ANYĪKÖÖL Ē JİẼḐ REK ECS	ECS Stories	No	Trial	Sudan Workshop Programme
Dinka Rek	Easy Reader	Anyīkōōl kōc kuōny piōōc ē dē t 1	Stories to help teach comprehension 1	No	Trial	Sudan Workshop Programme
Dinka Rek	Easy Reader	Anyīkōōl kōc kuōny piōōc ē dē t 2	Stories to help teach comprehension 2	No	Trial	Sudan Workshop Programme
Dinka Rek	Folktales	Anyīkōōl ē Jiēēḥ	Jiēēḥ Writers Workshop	No	Trial	Sudan Workshop Programme
Dinka Rek	Grammar Book	Acōk Jam ē Thuonjāḥ Athōr Tōk	Dinka Grammar Book One	No	Trial	Sudan Workshop Programme

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Dinka Rek	Grammar Book	Acók Jam ë thuonjån Rou	Dinka Grammar Two	No	Trial	
Dinka Rek	Health Card	Dhiööp	Aging	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Dhiëth	Birth	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Thuëët	Breast-feeding	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Muök Ě Meth	Child Care	No	Second Trial	Khartoum Workshop Programme
Dinka Rek	Health Card	Nyin 1	Eyes 1	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Nyin 2	Eyes 2	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Kuöony Tuenj 1	First Aid 1	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Kuöony Tuenj 2	First Aid 2	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Kuöony tuenj 3	First Aid 3	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Kuöony Tuenj 4	First Aid 4	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Kuöony Tuenj 5	First Aid 5	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Yenö HIV?	HIV/AIDS 1	No	First	Sudan Workshop Programme
Dinka Rek	Health Card	Ye yĩ ɲa keek lac wuöök?	HIV/AIDS 2	No	First	Sudan Workshop Programme
Dinka Rek	Health Card	Käk tuany HIV/AIDS	HIV/AIDS 3	No	First	Sudan Workshop Programme
Dinka Rek	Health Card	Wël lëu bĩk yĩn kuony	HIV/AIDS 4	No	First	Sudan Workshop Programme
Dinka Rek	Health Card	Biär	Immunization	No	Second Trial	Khartoum Workshop Programme
Dinka Rek	Health Card	Të Ye Meth diĩt Thĩn Adhiëth Yic	The Growth of the Baby in the Womb	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Wal 1	Medicines 1	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Wal 2	Medicines 2	No	Trial	SWP
Dinka Rek	Health Card	Wal 3 Amiöntueny	Medicines 3	No	Trial	SWP
Dinka Rek	Health Card		Children Need to Play	No	Second Trial	Khartoum Workshop Programme
Dinka Rek	Health Card	Cäm path	Nutrition	No	Second Trial	Khartoum Workshop Programme
Dinka Rek	Health Card	Tueny kö k yeke yök töc yic	Other Sexually Transmitted Diseases	No	Trial	Sudan Workshop Programme
Dinka Rek	Health Card	Kë W'ic ë Dhiëth Yic ë Ruön Tuenj Yic	Needs at Birth, and Development in the First Year	No	Trial	Sudan Workshop Programme

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Dinka Rek	Health Card	Tiŋ Liac	The Pregnant Mother	No	Trial	Sudan Workshop Programme
Dinka Rek	Liturgy	Kuɔɔny ë Nhialic Tënë Kacke	God's Help To His People	No	Trial	Sudan Workshop Programme
Dinka Rek	Language Learning		Language Learning Dinka	No	Trial	Dinka Literature Production Team
Dinka Rek	Miscellaneous	PĀLRĀK DE JIĒĒD	Cultural Book	No	Second	Sudan Workshop Programme
Dinka Rek	Miscellaneous	TIT YĪNHOM	Cultural Readers	No	Trial	Sudan Workshop Programme
Dinka Rek	Miscellaneous	Anyikööl ë Jiëŋ	Jieng Proverbs	No	Trial	Khartoum Workshop Programme
Dinka Rek	Miscellaneous	LÖÖD AKUTKUAANY TÖ U AMĀCDĪT CATHOLIC CÖK KHARTOUM	Guidelines for Election Committees Under Archdiocese of Khartoum Catholic Church	No	Trial	St.Paul Community
Dinka Rek	Numeracy	Akuën Y 4	Mathematics Book 4	No	Trial	Sudan Workshop Programme
Dinka Rek	Numeracy	Akuën Y4	Mathematic Book 4	No	Trial	Sudan Workshop Programme
Dinka Rek	Numeracy	Akuën Athör 5	Mathematics Book 5	No	Trial	KWP
Dinka Rek	P1	Piöcc ë Ciεεŋ	Social Studies Primary One	No	Trial	Sudan Workshop Programme
Dinka Rek	Post-Primer	Aprika kek Thudän	Africa and Sudan	No	Trial	Khartoum Workshop Programme
Dinka Rek	Post-Primer	Wël Pinyhom	Dinka Geography Book	No	Second	Sudan Workshop Programme
Dinka Rek	Post-Primer	Maany Ē Jiëŋ	Dinka Poems	No	Second	SIL
Dinka Rek	Post-Primer	KUĒ N Ē THUČDJĀD ATHÖR 5	Dinka Reader 5	No	Trial	Sudan Workshop Programme
Dinka Rek	Post-Primer	Wël ë Pïr	Dinka Science Book	No	Second	Sudan Workshop Programme
Dinka Rek	Post-Primer	Thučjāŋ Yōn 3	Dinka Third Book	No	Second	Sudan Workshop Programme
Dinka Rek	Post-Primer	Wëēt Ē Ciεεŋ Path	Advice For Good Living	No	Trial	Khartoum Workshop Programme
Dinka Rek	Post-Primer	Pïr ë Jiëŋ Alon Cam ë Thudän	Dinka Community Life In Northern Sudan	No	Trial	Sudan Workshop Programme
Dinka Rek	Primer	Athör Tuen Kuē n ë Thučjāŋ	Primer 1, Part 1	No	First	SIL
Dinka Rek	Primer	KUČN Ē THUČEŇJĀŇ ATHÖR 2	Dinka Reader 2	No	Trial	Sudan Workshop Programme
Dinka Rek	Primer	KUĒ N Ē THUČDJĀD ATHÖR 4	Dinka Reader 4	No	Trial	Sudan Workshop Programme
Dinka Rek	Primer	ATHÖR DĒ T	Dinka Reader II	No	Fourth	Dinka Literacy Project

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Dinka Rek	Primer	ATHÖR TUED	Reader I	No	First	Dinka Literacy Team
Dinka Rek	Primer	ATHÖR TUED Ĕ ROU KUĔ N THUODJÄN	Dinka Rek Primer 2	No	Trial	SIL-South Sudan
Dinka Rek	Sentence Book	Wël ě Pïir Y 1	Science Book 1	No	Second Trial	Sudan Workshop Programme
Dinka Rek	Songbook	Waak ě Nhialic	DINKA MASS SONGS	No	Second	Sudan Workshop Programme
Dinka Rek	Songbook		Hymn book	No	Trial	
Dinka Rek	Songbook	Diēt Tɔŋ ě Jiēŋ	Traditional WAR SONGS	No	Second	Khartoum Workshop Programme
Dinka Rek	Scripture Use	Athör ě Mëēn Dupiöny Thāndei Thukul	Sunday School Teacher's Training Book	No	Trial	Sudan Workshop Programme
Dinka Rek	Writing Principles		An Explanation of Dinka Orthography	No	Trial	SIL
Gbaya	Alphabet Book	Klākā Wārāgā Ká Lēmē Gbāyā	Alphabet Book	No	Third	Khartoum Workshop Programme
Gbaya	Alphabet Chart	Klógbó klākā wārāgā	Alphabet Chart	No	Trial	SWP
Gbaya	Alphabet Story Book	Kūlúbūtū Klākā Wārāgā	Gbaya Alphabet Story Book	No	Second Trial	SIL-South Sudan
Gbaya	Bible Story	Nówā	Noah	No	First	SIL-South Sudan
Gbaya	Easy Reader	Tú'dú tshíí úwú nē	A Boy and his Uncle	No	First	Khartoum Workshop Programme
Gbaya	Easy Reader	Kélē kūlúbūtū ká lēmē Gbāyā	Gbaya Stories Book	No	First	Khartoum Workshop Programme
Gbaya	Health Book	Gļēshē Gbōgbō	Health book	No	First	Sudan Workshop Programme
Gbaya	Miscellaneous	Dírí ká Gbāyā g†	Gbaya Names Book	No	Trial	Sudan Workshop Programme
Gbaya	Numeracy	'Bālā tǵí ká Kpú 1 - 10	Counting 1 - 10	No	First	Sudan Workshop Programme
Gbaya	P1	Grō'dō ádá áshá ápá ká ádá Áshá ká ndākpá P1	Social Studies P1 Pupil's Book	No	First	Sudan Workshop Programme
Gbaya	P2	Grō'dō ádá áshá ápá ká ádá Áshá ká ndākpá P2; Wārāgā ē ká lītí mādārāsā nī	Social Studies P2 Pupil's Book	No	Trial	Sudan Workshop Programme
Gbaya	Pre-Primer	Dī mūmū grōndó ūŋgú, Wārāgā nēté	Before Writing, Workbook	Has	Trial	Sudan Workshop Programme
Gbaya	Pre-Primer	Dī Mūmū Grō'dō ūŋgú	Pre-Reading Book	No	Trial	Sudan Workshop Programme
Gbaya	Pre-Primer	Dī mūmū grōndó ūŋgú	Before Writing, Teachers' Book	Is	Trial	Sudan Workshop Programme
Gbaya	Primer	Glūsū dī grōdó ūŋgú bí yómó Grōdó ndākpá	Teacher's Guide for Primer 1	Is	Trial	Sudan Workshop Programme
Gbaya	Sentence Book	Nēté ká Biyí ónjö	Biyi Onjo's Activities	No	First	SIL-South Sudan
Gbaya	Sentence Book	Könö tshíí Ĕlĕ	Dog and Hen	No	First	SIL-South Sudan

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Gbaya	Sentence Book	Gēsē éndé yākā dírí ní Gōzō ádá	This is a Girl Called Gozada	No	First	SIL-South Sudan
Gbaya	Sentence Book	Mömö ká Kínärä	Kinara's Home	No	Trial	SIL
Gbaya	Sentence Book	Āgá mā Yālā Dgā ká Ūyū ní?	How Do We Use Water?	No	Trial	SIL
Jumjum	Alphabet Book	Meengka Īccanhi yek Jiik Mā Watkeyt	Jumjum Alphabet Book	No	Second Trial	Sudan Workshop Programme
Jumjum	Alphabet Chart	Īccanhi	Alphabet Chart	No	Trial	SWP
Jumjum	Alphabet Story Book	Meengka Yaan Wiiwani Yen Īccanii	Alphabet Story Book	No	Trial	Sudan Workshop Programme
Jumjum	Easy Reader	Meengka Yaanh Wiiwanhi ká Jiik Jumjum	Jumjum Stories Book	No	Trial	Khartoum Workshop Programme
Jumjum	Word List	200 Jiik Perginht	200 Word List	No	Trial	Sudan Workshop Programme
Jur Modo	Alphabet Chart	‘jo ‘ba Akugu		No	First	SIL
Jur Modo	Alphabet Story Book	Buku Ma	P1 Reader	No	First	Jur Mödö Language Committee
Jur Modo	Dictionary		MÖDÖ Dictionary and Grammar	No	First	Summer Institute of Linguistics - Sudan
Jur Modo	Easy Reader	Komo	P-4 Reader	No	First	Jur Mödö Language Committee
Jur Modo	Easy Reader	Mora	P3 Reader	No	First	Jur Mödö Language Committee
Jur Modo	Easy Reader	Loma Ma Laka	Reader	No	First	Jur Mödö Language Committee
Jur Modo	Easy Reader	Yī Mökö	Wild Animals	No	First	Jur Modo language committee
Jur Modo	Liturgy	Buku ‘ba Mötu	Jur-Mödö Prayer Book	No	First	Jur Modo Language Committee
Jur Modo	Primer	AKIYANDI ‘BA TĪDĒKĪ WARAGA BUKU 1	Jur Mödö Primer - Book 1	Has	Third	Jur Mödö Language Committee
Jur Modo	Primer	AKIYANDI ‘BA TĪDĒKĪ WARAGA BUKU 2	Jur Mödö Primer - Book 2	No	Third	Jur Mödö Language Committee
Jur Modo	Primer	AKIYANDI ‘BA TĪDĒKĪ WARAGA BUKU 1	JUR MÖDÖ Teachers' Guides	Is	Trial	SIL
Jur Modo	Songbook	Buku ‘ba Dgala	Jur Modo, Hymns	No	Second	Jur Modo Language Committee
Keliko	Alphabet Book	Búkū Tāfī Ūñzú Ni Kēlī kō Tī Sī - Īmbápi Vé Drī koma	Keliko Alphabet Book Teacher's Guide	Is	First	SIL
Keliko	Alphabet Book	Búkū Tāfī Ūñzú Ni Kēlī kō Tī Sī	Keliko Alphabet Book	Has	First	Sudan Workshop Programme
Keliko	Alphabet Story Book	Búkū Tāfī Vé Pí Ú'dógú'dógú Be Rī	Alphabet Story Book	No	Second	SIL

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Keliko	Alphabet Story Book	Búkū Tǎfí Vé, Kĩlāsĩ Ālo Rĩ Pi Nĩ Ú'dógú'dógú Vé Lāngará Ūnĩzú Rĩ	Keliko P1 Reader (ABC Sentence Book)	No	First	SIL
Keliko	Bible Story	Yēsū vé Íngángará gǒó idri rú Drāngará Gálésĩ la rĩ	Jesus Raised from the Dead	No	First	South Sudan Workshop Program
Keliko	Bible Story	Ipakí Yēsū ri Pētĩ Alambaku sǐgé	Jesus Crucified	No	Trial	South Sudan Workshop Program
Keliko	Bible Story	Ú'dógú'dógú Kūrísímāsĩ vé rĩ	The Story of Christmas	No	First	SIL
Keliko	Calendar	KĀLÉNDĀ 2014	Calendar 2014	No	First	SIL
Keliko	Dictionary	Búkū tǎfí ūlūupi ni	Keliko - English Dictionary	No	Trial	SIL-Sudan
Keliko	Folktales	Búkū ú'dógú'dógú vé ni Kēlĩ kǒ tĩ sĩ	Keliko story book	No	Trial	SWP
Keliko	Folktales	Búkū ú'dógú'dógú vé ni Kēlĩ kǒ tĩ sĩ	Storybook in Keliko	No	Trial	SIL Sudan
Keliko	Health Book	Ú'dógú'dógú Ādraru vé rĩ	Adraru's story; How a community can love and care for people affected by AIDS	Has	Trial	SIL-Sudan
Keliko	Health Book	Ú'dógú'dógú Ādraru vé rĩ Búkū āngū ĩmbázú ni	Adraru's Story Facilitator's Manual	Is	Trial	SIL-South Sudan
Keliko	Miscellaneous	Búkū Tǎfĩfĩ Ā Ífĩfĩ Ūlūzú Nĩ Kĩlāsĩ Vúlé Rĩpi Nĩ Kēlĩ kǒ Sĩ Āzini [ngĩ lĩsĩ]	Bilingual Glossary for Lower Primary School, English - Keliko	No	Second Trial	SIL
Keliko	P1	Búkū kǎlǎfe lǎzú ni kĩlāsĩ ālu ní - Anji rĩpi vé búkū	Mathematics P1 Pupil's Book (in Keliko)	has	Trial	SIL
Keliko	Primer	Kēlĩ kǒ Tĩ Sīngará Ūnĩzú Vówēlĩ Pi Ū'dúkǒ Be Īmbápi Vé Búkū	Learning to write Keliko vowels and tones - teacher's book	Is	Second Trial	SIL Sudan
Keliko	Primer	Búkū Ālu Rĩ Ngá Lāngará Ūnĩzú Kēlĩ kǒ Tĩ Sĩ - Búkū Īmbápi ě drĩ koopi rĩ	Primer Book One - Teacher's Guide	Is	First	SIL
Keliko	Primer	Búkū Ālu Rĩ Ngá Lāngará Ūnĩzú Kēlĩ kǒ Tĩ Sĩ	Keliko Primer Book One	Has	First	SIL
Keliko	Primer	Búkū Īrĩ Rĩ Ngá Lāngará Ūnĩzú Kēlĩ kǒ Tĩ Sĩ	Keliko Primer Book Two Pupils' book	Has	Trial	SWP
Keliko	Primer	Kēlĩ kǒ Tĩ Sīngará Ūnĩzú Vówēlĩ Pi Ū'dúkǒ Be Anji Rĩpi Vé Búkū	Learning to Write Kēlĩ kǒ Vowels and Tones Student's Book	Has	Second Trial	SIL Sudan

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Keliko	Primer	Búkū Ĩrĩ Rĩ Ngá Lángará Ūñízú Kẹĩ kọ Tị Sị; Búkū Ímbápi ă drĩ kóopi ni	Kẹĩ kọ Primer Book Two Teacher's Guide	Is	Trial	SWP
Keliko	Sentence Book	Ăkáyó sị jó	Akayo builds a house	No	First	SIL-Sudan
Keliko	Sentence Book	'Bù dẹ Vé Lọọmvú	Bude's Pot	No	First	SIL
Keliko	Sentence Book	Ámákíma ri ădi 'o?	What is Amakima doing?	No	First	SIL
Keliko	Sentence Book	Ngá 'dĩri ădi?	What is this thing?	No	First	SIL
Keliko	Sentence Book	Ăcí Ăngũ Ndrezu Ni Pi	P1 Science Reader, Unit 7, Lights for Seeing	No	First	SIL
Keliko	Sentence Book	Ăŭ Mvá Mădăánjá Ika rĩ	The Little Red Hen	No	First	SIL
Keliko	Sentence Book	Ōsũ kă Nyôókũ Rĩ Pi Vé Rĩ	P3 Science Reader, Unit 8, Types of Soil	No	First	SIL
Keliko	Sentence Book	Índríkíndrĩ	P2 Science Reader, Unit 7, Shadows	No	First	SIL
Keliko	Songbook	Ūngó Múngú Rí Íngúzú Rĩ	Songs for Praising God - Book 1	No	Second	SIL
Keliko	Songbook	Ūngó Múngú Rí Íngúzú Rĩ (Ūngó 2 rĩ)	Songs for Praising God (Song Book 2)	No	Trial	SIL
Keliko	Songbook	Ūngó Múngú Rí Íngúzú Rĩ (Ungo na rĩ)	Songs for Praising God (Book 3)	No	Trial	SIL
Kuku	Easy Reader	Lukikirilŏn logon ɲarakindya todinŏ na kendya ko kurundyŏ	Stories to help teach comprehension	No	Trial	Sudan Workshop Programme
Kuku	Easy Reader	Nyatesi wurŏt Nyŏmit todinet	Punctuation Teaching Guide	Is	Trial	Sudan Workshop Programme
Kuku	Easy Reader	Nyatesi wurŏt	Punctuation	Has	Trial	Sudan Workshop Programme
Kuku	Easy Reader	Nyatesi wurŏt Buk kitaet	Punctuation Workbook	Has	Trial	Sudan Workshop Programme
Kuku	Folktales	Buk na Lukikirilŏn ko Munula ti Kuku	Kuku folk Stories	No	Trial	Sudan Workshop Programme
Kuku	Health Card	Ret logoo/so'bi 1	HIV/AIDS 1	No	Trial	Sudan Workshop Programme
Kuku	Health Card	Ret logoo/so'bi 2	HIV/AIDS 2	No	Trial	Sudan Workshop Programme
Kuku	Health Card	Ret logoo/so'bi 3	HIV/AIDS 3	No	Trial	Sudan Workshop Programme
Kuku	Health Card	Ret logoo/so'bi 4	HIV/AIDS 4	No	Trial	Sudan Workshop Programme
Kuku	Health Card	Kulye reto logon ryŏi i toyem	Other Sexually Transmitted Diseases	No	Trial	Sudan Workshop Programme
Kuku	Numeracy	Merya buk to 1	Arithmetic 1	No	Trial	Sudan Workshop Programme

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Kuku	Numeracy	Buk na meriya to 2	Arithmetic 2	No	Trial	Sudan Workshop Programme
Kuku	Numeracy	Buk na meriya to 3	Arithmetic 3	No	Trial	Sudan Workshop Programme
Kuku	Numeracy	Buk na meriya to 4	Arithmetic 4	No	Trial	Sudan Workshop Programme
Kuku	Numeracy	Buk na meriya to 5	Arithmetic 5	No	Trial	Sudan Workshop Programme
Kuku	Numeracy	Mo'donj	Money	No	Trial	Sudan Workshop Programme
Kuku	Numeracy	Diñit	Time	No	Trial	Sudan Workshop Programme
Kuku	Sentence Book	Do Logon Jörunök	Living things	No	Trial	Sudan Workshop Programme
Lopit	Alphabet Book	Hihena to Hutuk na Lopit	Letters of the Lopit Language	No	Trial	SIL-South Sudan
Lopit	Alphabet Chart	Rĩjõ rĩ hĩ ẹ n Inó Hitahúti No Hĩ gĩ ẹ rĩ ta	Lopit Consonant Chart	No	Trial	SIL
Lopit	Alphabet Chart	Rĩjõ rĩ hĩ ẹ n Hitahúti No Hĩ gĩ ẹ rĩ ta	Lopit Vowel Chart	No	Trial	SIL-Sudan
Lopit	Dictionary		Lopit Dictionary	No	Trial	SIL-South Sudan
Lopit	Folktales	Hĩ ya bĩ ta Te Hiroro Tono Lopit Dọ nge	A Collection of Folk Stories in Lopit	No	Trial	SIL
Lopit	Sentence Book	Osíáha Ámána Hĩ nẹ	Amana Searches for a Goat	No	Trial	SIL
Lopit	Writing Principles		Lopit Consonant and Vowel Book	No	Trial	SIL-South Sudan
Luwo	Alphabet Book	Ugweede Kede Kwaahno Ke Dhe Luwo	Luwo Alphabet and Numbers Book	Has	First	Luwo Literacy Project
Luwo	Alphabet Story Book	Luub ABC	Luwo ABC Storybook	No	First	Luwo Literacy Project
Luwo	Bible Story	Ciig Me Beer - Kwaahno Me Yoohd - Kitaab B	New Reader Portion - Book 2	No	Second	The Bible Society of Sudan
Luwo	Bible Story	Ciig Me Beer - Kwaahno Me Yoohd - Kitaab A	New Reader Portion Book 1	No	Second	The Bible Society of Sudan
Luwo	Bible Story	Ciig Me Beer - Kwaahno Me Yoohd - Kitaab C	New Reader Portion Book 3	No	Second	The Bible Society of Sudan
Luwo	Bible Story	Ciig Me Beer - Kwaahno Me Yoohd - Kitaab D	New Reader Portion Book 4	No	Second	The Bible Society of Sudan
Luwo	Folktales	Waaj Utiehm	Luwo Folk Stories	No	First	SWP
Luwo	Folktales	Lihngu Waaj Jo Luwo	Listen to the Stories of the Luwo People	No	First	SWP
Luwo	Folktales	Kwaan Waaj	Telling Stories	No	First	SWP
Luwo	Language Learning		English - Luwo Conversation Book	No	First	SIL

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Luwo	Numeracy	Koan Aci Ne Weel Geew	Koan Visits the Town	No	First	SWP
Luwo	Post-Primer	Kwaan Wong Ke Dhe Luwo	Luwo Calendar Storybook	No	First	SWP
Luwo	Post-Primer	Luub Paajo	Luwo Reader	No	Second	Luwo Literacy Organisation
Luwo	Primer	Kwaahn Umodho I	Luwo Primer I	Has	Second	Luwo Literacy Project
Luwo	Primer	Kwaahn Umodho II	Luwo Primer II	Has	First	Luwo Literacy Project
Luwo	Sentence Book	Koan Daahd Diel	Koan Searches for a Goat	No	First	SIL
Luwo	Sentence Book	Alween Jieno	The Little Red Hen	No	First	Summer Institute of Linguistics
Luwo	Sentence Book	Giih Giih ge ne Nhyaar Koan ke Tiiho	What does Koan like to do?	No	First	SWP
Luwo	Sentence Book	Giih Giih ge ne Nhyaar Adero ke Tiiho?	What Does Adero Like to Do?	No	First	SWP
Luwo	Sentence Book	Gihn Beehda Gih Ngaa?	Whose Thing is This?	No	First	SWP
Luwo	Transition Primer		Learn to Read and Write Luwo	No	Second	SIL-Sudan
Mabaan	Alphabet Chart		Mabaan Alphabet Chart	No	Trial	SWP
Mabaan	Health Book	WORG PWANI WAR MEN BAAN	Health Book	No	First	Khartoum Workshop Programme
Ma'di	Alphabet Book	MÁ TĀLĀKA ĪNĪ MĀ'DĪ TĪ SĪ ABC Bŭkŭ	ABC book	No	Third	SIL Sudan
Ma'di	Alphabet Story Book	Núkutā vúa Mā'dí tī ĩnĭ jó	Mā'dí ABC Storybook	No	Second	SIL
Ma'di	Bible Story	Cára Rŭbāngā drĭ Ābrāmŭ ní	The Lord's Covenant with Abram	No	First	SIL-Sudan
Ma'di	Bible Story	Dānĭēlē ni Bābōlōnĭ 'a	Daniel in Babylon	No	First	SIL Sudan
Ma'di	Bible Story	Rŭbāngā ō'bĭ Abraham ni; l'dóka 22: 1-19	God tested Abraham	No	Trial	SIL Sudan
Ma'di	Bible Story	Q'dó Yākóbō pĭ drĭ Esawu trō.	The Story of Jacob and Esau	No	Trial	Madi Literacy Committee
Ma'di	Bible Story	Yónā ni Nineve 'a	Jonah in Nineveh	No	First	SIL Sudan
Ma'di	Bible Story	Rŭbāngā Ōṣe Ábramu ni Kānānĭ; l'dóka 12:1-9	The Call of Abram - Life of Abraham 1	No	First	SIL Sudan
Ma'di	Bible Story	Ofú Mŭzē ni tĭjó r'ĭ	The Birth of Moses: Life of Moses 1	Has	Trial	SIL Sudan
Ma'di	Bible Story	O'dō Nyātālĭ Drĭ 'i; Mateo 1:18 – 2:11, Luka 1 – 2:11	The Christmas Story	No	First	SIL Sudan

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Ma'di	Bible Story	Yēsŭ Okē Onyá 'Bá Élifū Tōŭ Ní; Yōhánā 6: 1-14	Jesus Feeds the Five Thousand	No	First	SIL Sudan
Ma'di	Bible Story	Sāmáriagō Losó Rīi; Luka 10: 25-37	The Good Samaritan	No	First	SIL Sudan
Ma'di	Bible Story	Vū i'dó Íngóni yā 'i.	The Story of How the World Began	No	Second	Mā'dí Language Group
Ma'di	Bulletin	Kíríjobi		No	Trial	Khartoum Workshop Programme
Ma'di	Easy Reader	Ōdú tị Ō kŭ trō	The Leopard and the Tortoise	No	Trial	SIL Sudan
Ma'di	Easy Reader	EBŪ Ō VỊ MÃ'DÍ GÁ RĪ'I	Descriptive Writing	No	Trial	Sudan Workshop Programme
Ma'di	Easy Reader	Kwe, Ayísé, Ānyŭkwá, Ārínzi, Tā círí pí Ē 'bì ní rŭ Mā'dí Tị sĩ	Names of Trees, Grass, Animals, Birds, Fish and Insects in Mā'dí	No	Trial	Sudan Workshop Programme
Ma'di	Folktales	O'do Mā'dí Drī Ovile Rīi: Ālu	Collection of Ma'di Folk Stories:1	No	Trial	SIL Sudan
Ma'di	Folktales		Mā'dí Stories A Collection of Folk Stories	No	First	SIL Sudan
Ma'di	Folktales	O'dō Mā'dí Tị Sĩ	Stories in Mā'dí	No	Trial	Sudan Workshop Programme
Ma'di	Health Book	Ōvé	Diarrhoea Health Booklet	No	First	SIL Sudan
Ma'di	Health Book	Vŭgá o'drā ezē ā'dusī?	Why did Vuga die so young?	No	First	SIL Sudan
Ma'di	Health Book	Malérjā	Malaria Health Book	No	First	SIL Sudan
Ma'di	Numeracy	Tā Lāka Ālu ndī Mŭdrī	Counting 1-10	No	First	SIL Sudan
Ma'di	Pre-Primer	Lŭru Ū'dúkŭ Trō, Búkŭ Ē nŏ Drī	Tone and Vowel Picture Book	No	First	SIL Sudan
Ma'di	Primer	Mā Tālāka Įnī Mā'dí Tị Sĩ Búkŭ Ālujóa Rī'i	Learning to Read in Ma'di Book One	Has	First	Summer Institute of Linguistics
Ma'di	Primer	LĮnī Mā'dí Tị Sĩjŏ Rīi, Lŭru Ū'dúkŭ Trō, Búkŭ Įnī 'bá drī	Learning to Write Ma'di language Tone and Vowels Student Book	Has	Second	SIL Sudan
Ma'di	Primer	LĮnī Mā'dí Tị Sĩjŏ Rīi, Ū'dúkŭ Lŭru Trō, Búkŭ Lápŏnyī drī	Learning to Write Mā'dí Tones and Vowels Teacher's Book	Is	Second	SIL Sudan
Ma'di	Writing Principles		A Manual for Ma'di Facilitators, For Training Non-beginners	Is	First	SIL Sudan
Mandari	Bible Story	Yume nu Yesu Luka 1:26-38, 2:1-20	Luke 1:26-38, 2:1-20 in the Mundari language of Sudan	No	Trial	Sudan Workshop Programme

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Mandari	Bible Story	Lilim lu Samariaso Luke Luka 10:25-37	Luke 10:25-37 in the Mundari Language of Sudan	No	Trial	Sudan Workshop Programme
Mandari	Bible Story	Yesu a todindö ro kunu kwakwaddu ku ḡulökö kulu rok	Luke 11:1-36 in the Mundari language of Sudan	No	Trial	Sudan Workshop Programme
Mandari	Bible Story	Lilim Luka 15	Luke 15:1-32 in the Mundari language of Sudan	No	Trial	Sudan Workshop Programme
Mandari	Grammar Write-Up		Mundari Grammar Book	No	Trial	SIL-Sudan
Mandari	Writing Principles		Reading and Writing Mundari	No	Second Trial	
Mandari	Writing Principles		Reading and Writing Mundari Book 2	No	Trial	SIL-Sudan
Morokodo	Alphabet Book	Buku Ī'jō 'Bowa Yōru Ha Morokodo Aba	Morokodo Alphabet Book	No	First	Sudan Workshop Programme
Morokodo	Alphabet Chart	Ī'jō 'Bowa Yōru Ha Morokodo Aba	Alphabet Chart	No	First	SWP
Morokodo	Alphabet Story Book	Buku 'Ba Ī'jō Me'doYōru Ha Morokodo Aba	Morokodo Alphabet Sentence Book	No	Second Trial	Sudan Workshop Programme
Morokodo	Bible Story	Nowa	Noah	No	Trial	Sudan Workshop Programme
Morokodo	Catechism	Katikizimo	Catechism	No	Trial	Sudan Workshop Programme
Morokodo	Easy Reader	Komo nnī Mē'dēwu Aba	The Rabbit and the Hyena	No	Trial	Sudan Workshop Programme
Morokodo	Easy Reader	Kō'du a'di Kyi'di aho gomo möku	Why the Elephant ran into the forest	No	Trial	Sudan Workshop Programme
Morokodo	Liturgy	Buku 'ba Mötu	Prayer Book	No	Trial	Sudan Workshop Programme
Morokodo	Numeracy	Aritimītikī 1 Buku 'ba lo'ö	Arithmetic 1 Workbook	No	Trial	Sudan Workshop Programme
Morokodo	Numeracy	Aritimītikī 2 Buku 'ba lo'ö	Arithmetic 2 Workbook	No	Trial	Sudan Workshop Programme
Morokodo	Numeracy	Aritimītikī 1	Arithmetic 1	No	Trial	Sudan Workshop Programme
Morokodo	Numeracy	Aritimītikī 2	Arithmetic 2	No	Trial	Sudan Workshop Programme
Morokodo	Numeracy	Aritimītikī 3	Arithmetic 3	No	Trial	Sudan Workshop Programme
Morokodo	Numeracy	Aritimītikī 4	Arithmetic 4	No	Trial	Sudan Workshop Programme
Morokodo	Numeracy	Aritimītikī 5	Arithmetic 5	No	Trial	Sudan Workshop Programme
Morokodo	Numeracy	Aritimītikī 4 Buku 'ba lo'ö	Arithmetic4 Workbook	No	Trial	Sudan Workshop Programme
Morokodo	Numeracy	Kō'du kiti 1-10	Counting 1-10	No	Trial	Sudan Workshop Programme

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Morokodo	Primer	Buku 'ba Ko'jo wa Yoru aba	Reading and Writing Book	No	Trial	Sudan Workshop Programme
Morokodo	Sentence Book	Ti'bē lasi möku	Hunting	No	Trial	Sudan Workshop Programme
Morokodo	Sentence Book	Nenye gbölö ra	This is a bucket	No	Trial	Sudan Workshop Programme
Morokodo	Sentence Book	Gabi 'ba Khartoum	Khartoum Weather	No	Trial	Sudan Workshop Programme
Morokodo	Sentence Book	Wa Didi	Living things	No	Trial	Sudan Workshop Programme
Morokodo	Songbook	Buku 'ba Ngala	Morokodo Hymn Book	No	Trial	Sudan Workshop Programme
Moru	Alphabet Book	ETOVO MIEMBA RO KALA MORU SI	Teacher's Guide to accompany Moru Book One (ABC Book) for Primary One	Is	Second	SIL Sudan
Moru	Alphabet Book	ETOVO MIEMBA RO KALA MORU SI	Moru Book One for Primary One (ABC Book)	Has	Second	SIL Sudan
Moru	Alphabet Chart	Uwi Akpa-Akpa Moru Ro	Moru Di-graph and Tri-graph Chart	No	Trial	Moru Literacy Committee
Moru	Alphabet Chart	ABC Moru Ro	Moru ABC Chart	No	Second Trial	Moru Literacy Committee
Moru	Bible Story	Nowa	Noah	No	Trial	Sudan Workshop Programme
Moru	Easy Reader	Gbanda Se 'Desi, 'Desi, 'DESI Ono	The Very, Very, VERY Big Cassava (In Moru and English)	No	Second	SIL Sudan
Moru	Easy Reader	TANA E'DI KORONYA RI KO VO ALO YASI YA	Why Animals Are Not Living Together	No	Trial	Khartoum Workshop Programme
Moru	Health Card	Uti	Birth	No	Trial	Sudan Workshop Programme
Moru	Health Card	Ba endro	Breast-feeding	No	Trial	Sudan Workshop Programme
Moru	Health Card	Gyi-ako Lomvo ya	Dehydration	No	Trial	Sudan Workshop Programme
Moru	Health Card	Ta keci a'do ako wāri ro ro	General Hygiene	No	Trial	Khartoum Workshop Programme
Moru	Health Card		Health & Disability	No	Trial	Sudan Workshop Programme
Moru	Health Card		HIV/AIDS 1	No	Trial	Sudan Workshop Programme
Moru	Health Card		HIV/AIDS 2	No	Trial	Sudan Workshop Programme
Moru	Health Card	Ngase ka be HIV/AIDS ezina	HIV/AIDS 3	No	Trial	Sudan Workshop Programme
Moru	Health Card	Laza se oriviya kado ro	HIV/AIDS 4	No	Trial	Sudan Workshop Programme
Moru	Health Card	Omba ngwa ro rovo ya	The Growth of the Baby in the Womb	No	Trial	Sudan Workshop Programme

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Moru	Health Card	Lomvo yi amaro	Our Bodies	No	Trial	Sudan Workshop Programme
Moru	Health Card	A'do kado endre ro	Safe Motherhood	No	Trial	Khartoum Workshop Programme
Moru	Health Card	Adravo azaka se unina ndi ru larine rudro'be si	Other Sexually Transmitted Diseases	No	Trial	Sudan Workshop Programme
Moru	Health Card	Si	Teeth	No	Trial	Sudan Workshop Programme
Moru	Health Card	Nga azaka se uti le be, ago omba ndroa kăti ya	Needs at Birth, and Development in the First Year	No	Trial	Sudan Workshop Programme
Moru	Health Card	Endre se Kovoro ro	The Pregnant Mother	No	Trial	Sudan Workshop Programme
Moru	Health Card	Omba To'di	Youth	No	Trial	Sudan Workshop Programme
Moru	Numeracy	Parata	Money	No	Trial	Sudan Workshop Programme
Moru	Numeracy	Kitu	Time	No	Trial	Sudan Workshop Programme
Moru	Primer	KITO LUSI RO LUKA BE	The Story of Lusi and Luka - Moru Book 2 (Primer)	No	Third	SIL-Sudan
Moru	Sentence Book	Ono lakaza yi	This is a bucket	No	Trial	Sudan Workshop Programme
Moru	Sentence Book	oli kărâtumu ya	Khartoum Weather	No	Trial	Sudan Workshop Programme
Moru	Sentence Book	Nga adri, adri ro	Living things	No	Trial	Sudan Workshop Programme
Moru	Sentence Book	Tău Giriŋwa Okarwa	The Little Red Hen (In Moru and English)	No	Third	SIL Sudan
Moru	Sentence Book	Kuzupi nga ono ro a'di ya?		No	Trial	Sudan Workshop Programme
Mundu	Alphabet Book	Jiangŭ ka wŭ Mündŭ	Alphabet book in the Mündŭ Language - Teachers Guide	Is	Fourth	Mundu Language Committee
Mundu	Alphabet Book	Jia ngŭ ka wŭ Mündŭ	Mundu Alphabet Book	Has	Second	Institute of Regional Languages
Mundu	Easy Reader	Mŭ Ena Atanga Atanga E'ba'basu Buku	Mundu P2 Reader	No	Trial	Institute of Regional Languages
Mundu	Easy Reader	Cingangŭ Tengŭ Mŭ	Mundu P3 Reader	No	Second	Mundu Language Committee
Mundu	Easy Reader	Cingangŭ Teka Jia Ngŭ E'ba'basu Buku	P3 Reader Part 2	No	Second	Institute of Regional Languages
Mundu	Easy Reader	Cingangŭ ka Tŭmbere	Spider (Trickster) Stories	No	First	Mundu Language Committee
Mundu	Easy Reader	Cingangŭ teka Jia Ngŭ Gina Buku	P3 Reader Part 1 in the Mundu Language	No	Second	Mundu Language Committee

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Mundu	Grammar Book	Ah le de nih wu si-ngü teka ngü Mündü Buka ka egü-tamu-ngü-ngü	Language Awareness - a Mündü grammar book for P3 - Teacher's Guide	Is	First	SIL-South Sudan
Mundu	Grammar Book	Ah le de nih wu si-ngü teka ngü Mündü	Language Awareness - a Mündü grammar book for P3	Has	First	SIL-South Sudan
Mundu	Health Book	Mü Wu si-ngü teka AIDS eyi?	Aids Awareness	No	Trial	Mundu Language Committee
Mundu	Primer	Nih Tanga Etanga Gina Buku Teachers' Guide	A reader in the Mündü language - Part one of two books Teacher's Guide	Is	Trial	Institute of Regional Languages
Mundu	Primer	Nih Tanga Etanga Gina Buku	A reader in the Mündü language - Part one in a series of two books	Has	Second	SIL
Mundu	Transition Primer	Okoki kotanga lokota na Mündü	Can you read Mundu? A transition primer from Bangala to Mundu.	No	Second	Mundu Language Committee
Mundu	Transition Primer	Ngü Mündü Mere Kpeke De	Transition Primer English-Mundu	Has	First	Mundu Language Committee
Murle	Alphabet Book	Warage O Kananowu Murleye	Alphabet Book	No	First	SIL
Murle	Alphabet Chart	Kananok Murleye	Murle Alphabet Chart	No	Third	SIL
Murle	Alphabet Story Book	Βογεεη O Kananowu Murleye	Alphabet Story Book	No	First	SIL
Murle	Bible Story	Adom ki Daa - Εεηνγαν ο loocu 3	Adam and Eve Sin	No	Second Trial	Sudan Workshop Programme
Murle	Easy Reader	Zoozok o Kelego Ki Kibaali	Words of the Animals	No	Second	SIL
Murle	Folktales	Zoozok o Kelego ki Kibaali	Words about animals and birds	No	First	SIL
Murle	Folktales		Murle Stories - A Collection of Folk Stories	No	Trial	SIL - Sudan
Murle	Health Book	Moriz O Kazi Kanonot	HIV/ AIDS Book	No	First	Sudan Council of Churches
Murle	Health Book	Warage O Kagawi Moriz O Kazi Malariya	Malaria Health Book	No	Trial	SIL
Murle	Pre-Primer	Warage O Miliny	Little Book Pre-Primer	No	Third	Murle Translation and Literacy Project
Murle	Primer	Warage O Loro	Loro's Book, Primer Book 1	No	Third	Summer Institute of Linguistics
Murle	Primer	Warage o Kemeribonj oowu	Murle Primer Part 1	No	Second Trial	Murle Bible Translation and Literacy

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Murle	Primer	Warage o Kemeribonj ano goon	Murle Primer Part 2	No	Second Trial	Murle Bible Translation and Literacy
Murle	Sentence Book	Daidok	All Women	No	Trial	SIL
Murle	Sentence Book	Ǝez ci Akolozni	Lost Goat	No	Trial	SIL
Murle	Sentence Book	Mudec ki bora	Rat and Cat	No	Trial	SIL
Murle	Songbook	Beniinok o Kirismizo	Christmas Songs	No	Trial	Khartoum Workshop Programme
Murle	Scripture Use	Linjinonok o Thoonnyawu (Linjinon o Ceez o Daryintho)	Acts of the Apostles in Murle	No	Trial	Murle Congregation
Murle	Scripture Use	Barzan ci Baibolo Murleye	Introduction to the Bible in Murle	No	Trial	Murle Congregation
Murle	Scripture Use		Genesis and Exodus	No	Trial	Sudan Workshop Programme
Murle	Scripture Use	Marko	Mark	No	Trial	Sudan Workshop Programme
Murle	Scripture Use	Gol Ci Rogetho Murleye	Ways of Salvation in Murle	No	Trial	Murle Congregation
Narim	Alphabet Book	Abbacca cī Thowuretu Laarimmeyyei	Laarim Alphabet Book	No	Third	SIL
Narim	Alphabet Chart	Ririwanīnē cīk Laarimak	Laarim ABC Chart	No	First	SIL
Narim	Alphabet Story Book	Abbacca cī Ririwaninu Laarimmeyyei	Laarim Alphabet Storybook	No	First	SIL
Narim	Bible Story	Iyiainit cī Kīrīthīmēnō	Christmas Story	No	First	SIL
Narim	Folktales	Wudenyu	Squirrel Laarim Folk Stories	No	First	SIL
Narim	Folktales	Iyiainit cī Kēlēgēnu Laarimeyyei	Animal Stories of the Laarim	No	First	SIL
Narim	Grammar Write-Up		Laarim Discourse Grammar Book	No	First	SIL-Sudan
Narim	Grammar Write-Up		Laarim Grammar Book	No	Fourth	SIL-Sudan
Narim	Primer	Ngaraga cī Ǝēn Codoi cī Kēbēlī	Primer 1	No	Trial	SIL - South Sudan
Narim	Sentence Book	Tūwūlūc cīdīcī cī meerihi	The Little Red Hen	No	Second	SIL
Narim	Sentence Book	Nyia Go Cī Adīman Kūrūth?	What Does A Dog Like To Do?	No	Second	SIL-Sudan
Narim	Sentence Book	Iyiainit cī Towono	The Flood	No	Trial	SIL
Narim	Sentence Book	Bōōnō	The Forest	No	Trial	SIL
Narim	Writing Principles		Laarim Consonant & Vowel Book	No	Second	SIL-South Sudan
Ndogo	Alphabet Book	Kitá'bù Ndâ Mbó Bà Cu Có Ndógó	Ndogo Alphabet Book	No	Third	KWP
Ndogo	Alphabet Chart	Ndâ Kò-có Ndógó	Ndogo Alphabet Chart	No	Third	KWP

Vernacular	Content Classification	Title in Language of Writing	Title in English	TG	Edition	Publisher
Ndogo	Alphabet Story Book	Kitá'dù Ndá Cè Tiŕi Gítí Ndá Kò-có Bà Cu Có Ndógó	Ndogo Alphabet Story Book	No	First	Khartoum Workshop Programme
Ndogo	Catechism		Katechism	No	Second	Khartoum Workshop Programme
Ndogo	Health Book	Kèjì Bà 'Vala Ndá 'Duù 'Dó Gbí Ndá Njì Nò'o	The Way of Protecting From Germs	No	First	Khartoum Workshop Program
Ndogo	Health Card	Bà ngbaranga tí a banga 'válá	General Hygiene	No	Second Trial	Khartoum Workshop Programme
Ndogo	Health Card	Cèe bà 'vala ndò tí 'bá	Natural Family Planning	No	Second	Khartoum Workshop Programme
Ndogo	Health Card	Tó 'válá mì nawu 'vii	Safe Motherhood	No	Second	Khartoum Workshop Programme
Ndogo	Numeracy	Bà 'Deke'i 1 - 10	Counting 1 - 10	No	Trial	Khartoum Workshop Programme
Ndogo	Primer	Kpédélé Kitá'bù Bà 'Deke'i Ta Có Ndógó	Ndogo Primer - Part 1	Has	Fourth Trial	SWP
Ndogo	Primer	Bà Só Kitá'bù Bà 'Deke'i Ta Có Ndógó	Ndogo - Primer - Part 2	Has	Trial	SWP
Ndogo	Primer	Kpojèjì Bà Nibà Kpédélé Kitá'bù Bà 'Deke i Ta Có Ndógó	Teachers' Guide for Primer 1	Is	Trial	Khartoum Workshop Programme
Ndogo	Primer	Bà Só Kitá'bù Bà 'Deke'i Ta Có Ndógó	Ndogo Primer 3	Has	Trial	Sudan Workshop Programme
Ndogo	Primer	Kpokèjì Gírì Bà Nibà Bà 2-3 Kitá'bù Bà 'Deke'i	Teachers' Guide to Parts 2 & 3 of the Primer	Is	Trial	Sudan Workshop Programme
Ndogo	Sentence Book	Bà nò Jìlì	Hunting	No	Second Trial	Sudan Workshop Programme
Ndogo	Sentence Book	Njì mì Gba	The Field of the Chief	No	Second Trial	Sudan Workshop Programme
Ndogo	Sentence Book	Ndâ Tàdíí ta Júdíí	Tadii and Judii	No	Second Trial	Sudan Workshop Programme
Ndogo	Sentence Book	Ndâ Tàdíí ta Júdíí 'do gbí Njì	Tadii & Judii on their way Home	No	Second Trial	Sudan Workshop Programme
Nuer	Alphabet Book	Kuëns Kε Thok Nath - Bok Kεl	A modern reader in the Nuer language - Part One in a series of five parts	No	Fifth	Institute of Regional Languages
Nuer	Alphabet Story Book	Ruaacni ti Ḍj̣eckε Dḥō li Ḅa ni	Nuer Alphabet Story Book	No	Second	Institute of Regional Languages
Nuer	Easy Reader		Nuer Story Book	No	First	
Nuer	Folktales	Bok Căätñi Kolan̄ Ṭə ɔ t	Nuer (Kolang) Folk Stories Part One - A reader for advanced pupils	No	First	Institute of Regional Languages

Global Book Fund Country Study

TANZANIA

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1. Methodology

The Tanzania country study was conducted by Abdullah Saiwad, consultant for International Education Partners (IEP), over the course of September 2015 – January 2016. It consisted of a combination of literature review and in-person interviews with key stakeholders. The goal of the study was to identify the challenges, constraints and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund.

Interviews in Tanzania included representatives of all of the main stakeholders in the primary reading book chain, both public and private, including urban and rural government and private primary schools, project implementers, publishers, printers, booksellers, donors, and non-governmental organizations. Government stakeholders consulted included the Ministry of Education, Science, Technology and Vocational Training (MOEVT) and the Ministry of Culture. In most cases, face to face interviews were conducted, although some interviews were conducted by telephone. A complete list of in-country interviews is provided in Appendix 1.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background and Education System

The United Republic of Tanzania gained independence in 1964, with the merging of Tanganyika and Zanzibar. Tanzania has a geographic area (Figure 1) of 947,300km² with a total population of 51,045,882.¹⁹⁸ Population density is extremely uneven with most of the population living on the coast or around the northern border. The rest of the country is only sparsely populated. Population density varies from 12/km² in the Katavi Region¹⁹⁹ to 3,133/km² in the Dar es Salaam Region²⁰⁰. The majority (70%) of the population is currently classified as rural, although urban migration has steadily reduced rural populations over the past 40 years. The religious split on mainland Tanzania is 35% Muslim, 30% Christian,

Figure 1: Map of Tanzania



¹⁹⁸ CIA. (2016). Tanzania Factbook. Retrieved 2016 from <https://www.cia.gov/library/publications/the-world-factbook/geos/tz.html>

¹⁹⁹ National Bureau of Statistics (NBS) and Office of Chief Government Statistician (OCGS), Zanzibar. (2013). 2012 Population and Housing Census: Population Distribution by Administrative Units; Key Findings. Dar es Salaam, Tanzania: NBS and OCGS.

²⁰⁰ Ibid.

Figure 2: Structure of Tanzania's education system

Expected Age	7–13 years–old	14–17 years	18–19 years	20–22 years
School	Primary School	Secondary School (O Level)	A Level	University
Grade	Standard 1–7	Form 1–4	Form 5–6	Bachelor's Degree

and 35% indigenous beliefs. Zanzibar, on the other hand, is more than 99% Muslim.²⁰¹

According to the World Bank 2014 statistics, the annual per capita income in Tanzania is US\$930 and it has a UN HDI world ranking of 159, placing the country into the low income sector. The literacy rate in Tanzania, as defined by the CIA World Factbook as “age 15 and over who can read and write Kiswahili (Swahili), English, or Arabic” is 70.6%, with a male literacy rate of 75.9% and a female rate of 65.4%.²⁰²

Primary education is currently a 7-year system following 1 year of pre-school education. It is universal and compulsory for all children aged 7–13 years. Figure 2 shows the standard structure of the education system in Tanzania from primary school through university. Note that students may graduate from secondary school and attend primary school teachers' college or from A Level and attend secondary school teachers' college.

It is currently proposed that Standard VII will be abolished, probably by 2020, as a result of the phased introduction of the new curriculum. It is also proposed that lower secondary education will become compulsory for all students. Thus, from 2020, the compulsory basic education cycle will be 10 years comprising 6 years of primary and 4 years of lower secondary.

At present, student achievement within the primary education system is a cause for concern. The 2015 Uwezo report found that, in Tanzania, learning levels were low across all ages and grades.²⁰³ However, children from wealthier or urban households and those that attend private schools tend to outperform their peers. Only one in four children in Standard III can read a Standard II story in Kiswahili. Only one out of ten children in Standard III can read a Standard II level English story. Moreover, where a child lives has an effect on if and when they learn to read and do arithmetic. Thus, for example, students in Dar es Salaam, Morogoro, and Arusha are two and a half times more likely to achieve early literacy and numeracy than students in rural districts such as Serengeti or Tasulu. The primary school population table in Figure 3 is derived from the 2014 edition of Tanzania's Basic Education Statistics (BEST).

The total primary school population peaked in 2009 and has declined slightly since then. The primary net enrollment rate for 2014 was cited as around 85%. Primary enrollment is falling as static enrollment fails to keep pace with demographic growth.

Overall there is close to gender parity in primary enrollments, with slightly more boys than girls enrolled in Standards I and II, but with more girls than boys from Standards III to VII. Girls' drop-out rates are lower than those for boys.

²⁰¹ CIA. (2016). Tanzania Factbook. Retrieved 2016 from <https://www.cia.gov/library/publications/the-world-factbook/geos/tz.html>

²⁰² Ibid.

²⁰³ Jones, S., and Mgalla, Z. (2015). *Tanzania Annual Report*. Dar es Salaam: Uwezo.

Figure 3: School enrollment data by standard, 2013 MOEVT Data

	Male	Female	Total
Total All Standards	4,066,287	4,165,626	8,231,913
Government	3,965,572	4,068,354	8,033,926
Private	100,715	97,272	197,987
Total Std I	717,824	712,407	1,430,231
Government	700,589	696,045	1,396,634
Private	17,235	16,362	33,597
Total Std II	674,839	673,059	1,347,898
Government	658,628	657,303	1,315,931
Private	16,211	15,756	31,967
Total Std III	639,084	641,224	1,280,308
Government	623,095	626,189	1,249,284
Private	15,989	15,035	31,024
Total Std IV	590,266	603,846	1,194,112
Government	575,592	589,652	1,165,244
Private	14,674	14,194	28,868
Total Std V	509,185	534,016	1,043,201
Government	495,377	520,298	1,015,675
Private	13,808	13,718	27,526
Total Std VI	512,278	538,136	1,050,414
Government	499,985	525,831	1,025,816
Private	12,293	12,305	24,598
Total Std VII	422,811	462,938	885,749
Government	412,306	453,036	865,342
Private	10,505	9,902	20,407

In 2013, there were 16,343 primary schools, of which 15,556 were government schools and 767 were private schools. The teacher/student ratio was 1:44 and the qualified teacher/student ratio was 1:43 which demonstrated the high level of qualified teachers (99%) working in the Tanzanian primary school system. Unfortunately, many qualified teachers are seriously underprepared and incapable of delivering modern pedagogy. Indeed, this is being tackled through the ongoing in-service education and training program (INSET) which is focused

on strengthening the capability of teachers and improving teaching skills, teacher motivation, and time on task.

2.2 Country Language Profile

Tanzania is a multilingual country with many spoken languages, but no one local language is spoken natively by a majority or even a large plurality of the population. In this circumstance and with the active encouragement of government, the Bantu Swahili

language which is the lingua franca widely spoken nationwide is used as the Language of Instruction (LOI) for primary education. According to the latest edition of the SIL Ethnologue for Tanzania, there are a total of 126 local languages spoken in Tanzania, of which two are institutional, 18 are developing and 58 are vigorous.²⁰⁴ Most languages spoken locally belong to two broad language families: the Niger–Congo (Bantu branch) and the Nilo–Saharan (Nilotic branch), spoken by the country’s Bantu and Nilotic populations, respectively. Additionally, the Hadza and Sandawe hunter–gatherers speak languages with click consonants. The Cushitic and Arab ethnic minorities speak languages belonging to the separate Afro–Asiatic family. Tanzania’s various ethnic groups typically speak their mother tongues at home and within their own communities. The two official languages, English and Swahili, are used in varying degrees of fluency for communication with other populations. According to the official national language policy announced in 1984, Swahili is the language of the social and political sphere as well as primary and adult education, whereas English is the language of secondary education, universities, technology, and the higher courts. The government announced in 2015 that it would discontinue the use of English as a language of education as part of an overhaul of the Tanzanian school system, but final decisions on how this policy issue will be implemented are still awaited from the MOEVT. Major local languages spoken in Tanzania with the number of speakers, largely based on 2006 data from SIL, are shown in Figure 4.

Figure 4: Major Languages in Tanzania

Language	Speakers (million)
Kiswahili	15 ²⁰⁵
Sukuma	5.43
Gogo	1.4
Haya	1.3
Ha	1
Nyamwezi	1
Makonde	0.98
HeHe	0.8
Nyakyusa–Ngonde	0.8
Luguru	0.7
Bene	0.67
Zaramo	0.66
Shambala	0.66
Nyature	0.6
Mochi	0.6
Asa	0.5

2.3 Language of Instruction (LOI) Policy

Swahili is currently the LOI for pre–schools and the primary cycle. Transition to English as the LOI currently starts in Secondary Form 1. The current LOI in all secondary grades is English, although in 2015 the MOEVT has announced that the secondary LOI will be changed to Kiswahili at some point in the future. When the new curriculum is introduced, English will be taught as a compulsory subject starting from primary Standard III rather than the current Standard I. Kiswahili will continue to be taught as a compulsory subject throughout all secondary grades.

There is concern within the MOEVT about national levels of literacy achievement and subject performance, and the promised shift away from English to Kiswahili as the secondary LOI is at least in part the result of concerns over poor

²⁰⁴ Lewis, M. Paul, Gary F. Simons, and Charles D. Fennig (eds.). (2015). SIL Ethnologue for Tanzania. From, Ethnologue: Languages of the World, Eighteenth edition. Dallas, Texas: SIL. International. Online: <http://www.ethnologue.com>

²⁰⁵ 80% of the rural population is also estimated to speak Kiswahili as a secondary language.

standards of English in many secondary schools. However, the MOEVT has also suggested that the choice of Kiswahili or English as LOIs could be made by individual schools. Due to these numerous considerations, future national LOI policy for secondary schools is uncertain.

Although interviews with the MOEVT did not generate any concrete statements on the issue, there is probably little enthusiasm within the MOEVT for supplying local language reading books to primary grades. The MOEVT perceives that the use of Kiswahili as the national LOI for primary schools is a national unifying factor and would thus probably resist the introduction of local languages as school subjects and, as such, the supply of reading books in any local languages apart from Kiswahili and English. The demand for the provision of reading books in English will depend on future policy decisions on LOIs in secondary schools.

3. Current Print and Digital Reading Book Provision

BEST publishes no data on TLM stocks in schools, including stocks of reading books. School operational budgets were reported by interviewed schools and MOEVT staff to be insufficient even to purchase adequate textbook stocks, so the purchase of reading books by schools is not common. Reading book supplies/donations to schools were considered to be irregular or non-existent for most primary schools, and where they did exist they were provided by donors/NGOs and not by the MOEVT. Unless supported by a donor organization, either as a one-off project/donation or as part of an existing donor project (e.g., Children's Book Project, Room to Read, Education Quality Improvement Project, etc.), it is widely believed that there are usually no books available for reading in government primary schools in Tanzania. The accepted languages in government primary schools are Kiswahili and English. Arabic and Hindi books will only be available in special Arab or Indian-oriented private primary schools. Local indigenous languages are thought of negatively by the MOEVT

in Tanzania because they are considered to have the potential to divide the population.

Although one of the private schools interviewed had a small library, it had a "no lending" policy because of limited library stock and fears that borrowed books would not be returned or would be returned damaged. On the basis of the currently available information, it has to be assumed that Tanzanian government primary schools, particularly in rural areas, are poorly supplied with primary grade reading books in any language. The situation is reported to be somewhat better in the private school system. Unfortunately there is no official data that can be used to quantify current levels of reading book provision in government and private primary schools

According to MOEVT data, in 2014 only 20% of government primary schools had access to reliable electricity. No data was available on the number of government primary schools with internet access. In 2014, the MOEVT recorded 7,029 computer devices available for primary grades in government schools. MOEVT policy is that computer use should be restricted to primary grades 4–7. This would suggest a computer to student ratio of 1.7 computers per 1,000 students in these grades.

MOEVT has commented that it has more wishes than plans for ICT4E investment in primary grades.

The data above suggests that any national framework for the emergence of a digital market for reading book provision, distribution, and use for government primary schools is unlikely in the short to medium term. There is no Tanzanian digital retailer, but eKitabu in Nairobi reports that they have parental and private school customers in Tanzania, so a limited digital reading book market could emerge more quickly among better-off parents and up-market private schools. DFID has commented that the potential for the development of a digital reading framework may be bigger than suggested if cheap smart phones become more widely available in line with the World Reader pilot project in Tanzania.

4. Country Findings and Market Gaps

4.1 *Authorship and Publishing Capacity*

After independence, Tanzania moved quickly to establish state publishing, printing, and distribution as the vehicle for school Teaching and Learning Material (TLM) supply. Unfortunately, 25 years of state textbook provision in Tanzania from 1966 to 1991 failed to achieve adequate and equitable supplies of primary or secondary textbooks to schools. State published textbook content, presentation, and pedagogic quality were widely regarded as poor quality and sub-standard. State produced textbooks used low quality text paper, which affected readability. Textbooks were manufactured with poor quality cover card, unsewn bindings, and without cover varnishing or lamination, all of which seriously affected classroom durability and increased the recurrent cost of textbook provision. The state-owned publishing, production, and distribution companies lacked qualified and experienced management and professional staff and were frequently underfunded, as well. None of the 5 state-owned companies continued to be involved in textbook provision after the introduction of the 1991 liberalized textbook policy. The very substantial support to the state system provided by development partners over many years did not result in the development of real local publishing, production, or distribution capacity nor in the growth of sustainable and reliable quality textbook supply.

The state-owned monopoly textbook provision system destroyed the national bookselling network, reduced private sector educational, general, and cultural publishing to a shadow, and undermined the growth and development of commercial book printing in Tanzania. Even with significant financial and technical support from development partners, it took almost 10 years to rebuild the private publishing sector and to accomplish the transition from state monopoly back to competitive textbook provision based on

decentralized financing and school-based choice. Local publishing capacity was the first sector to recover, and by 1995 local commercial publishing, attracted by renewed access to the key primary textbook market, was producing textbooks of higher pedagogic content, presentation, and production quality than the previous state system. As a result, Tanzania currently provides a competent educational publishing capacity with the ability to find authors and publish good quality textbooks and reading books conformable with the curricula and syllabi. The creation of the Educational Materials Approval Committee (EMAC) was the key institutional vehicle for the establishment of a list of competing alternative textbooks which were evaluated and approved for conformity to MOEVT requirements.^{206,207,208} Unfortunately, EMAC suffered from at least two major problems. First, price was not included as a criterion for the evaluation of the TLMs to be included in the approved list. As a result, publishers tended to increase prices as soon as their titles were included on the approved list, and EMAC had no way of controlling the price increases. Second, there was no time limit for an approved title. Publishers were permitted to submit titles for evaluation at any time, so new textbook and supplementary materials titles were constantly added to the approved list. At the same time, there was no facility for removing old titles from the list. Thus, the approved list grew out of control and became increasingly difficult for schools to use. In addition, there were frequent reports of corruption/nepotism and cronyism/cartel approaches, resulting in many low quality textbooks being approved by EMAC with high unit costs for the end users.

In 2010, the MOEVT concluded without any substantive evidence that the cause of deteriorating examination results was the system of multiple textbook choice provided by the EMAC approved list. The MOEVT asserted that the choice provided by the EMAC list confused parents, teachers, and students. As a result, the MOEVT proposed a return to a single monopoly

²⁰⁶ Read, T. (Feb 2010). *The Future of Our Children's Education: Providing the Best Textbooks for the Next Generation*. Windsor, UK: International Education Partners for PATA.

²⁰⁷ Read, T. (July 2015). *Where Have all the Textbooks Gone?* Washington, DC, USA: World Bank.

²⁰⁸ SEDP Implementation Completion Report. (June 2008). Washington, DC, USA: World Bank.

textbook for each subject and grade level. Tanzanian private sector publishers feared that the MOEVT would use this policy as a transition back to a state textbook provision system and the removal of school-based decision making and purchasing. The MOEVT were certainly justified in their criticisms of EMAC, although the reform of the EMAC evaluation system and approved list probably may have been a more rationale response. However, the government decided to close EMAC in 2013 and to select two textbook series for each subject and grade to be allocated as monopolistic textbooks to different districts.

In 2016, the GOT has approved a return to monopolistic school textbook provision using Tanzania Institute of Education (TIE) as the state publisher. These books will be the subject of mass printing contracts financed by the Global Partnership for Education (GPE) and awarded via competitive international manufacturing contracts. Unfortunately, in February 2016 three senior TIE officials were dismissed for failing to implement printing contracts according to the tender rules, resulting in the sub-standard manufacture of millions of Standard 1 textbooks which were then rejected by the MOEVT, and P1 students received no textbooks in 2016.²⁰⁹

4.2 Printing

Tanzanian textbook printing facilities have improved considerably over the past decade. The quality of manufacture and the capacity of the Tanzanian printing industry is getting closer to the standards of international printing centers, though local prices are still estimated by publishers to be roughly 15% higher. More complex printing tasks, such as printing illustrations across a double-page spread, remain difficult for local printers. Additionally, while the most durable bindings available from Tanzanian book printers are made with saddle stitching, Tanzanian printers do not have sufficient thread-sewn binding capacity to compete in textbooks of longer extents.

Despite the benefits of international printers over local ones, the use of international printing centers by Tanzanian publishers has been discouraged by the bureaucracy of clearing and forwarding goods passing through Dar es Salaam port. For example, a stock consignment from India to Dar es Salaam port might take 6–8 weeks plus another 6–8 weeks for clearing at the port. Thus, when order quantities are not large and the printing quality is not very demanding, local publishers would likely select a local printer. Another reason why local publishers choose local printing instead of international printing is to develop closer working relationships with local printers in order to obtain favorable credit terms. This only happens when publishers order frequently from the same printer.

4.3 Procurement

As part of the World Bank-funded Primary Education Development Program (PEDP) in 2000, TLMs were included in annual school capitation budgets. This required the establishment of an MOEVT-approved list of textbooks, reading books, and other supplementary materials from which schools could select their TLM requirements. The EMAC textbook approval process fulfilled this role and publishers submitted their curriculum related outputs for evaluation to EMAC.

Although the system worked fairly well at the beginning, there was always a need for reforms²¹⁰ in order to achieve:

- ▶ a competitive textbook evaluation in which books are approved with price as an evaluation criterion for a fixed period of time only, rather than indefinitely
- ▶ a more limited approved list of textbooks to make school-level selection easier
- ▶ minimum production specifications so that all titles on the approved list have the same basic durability standards

²⁰⁹ *Daily News*. (Feb 2016).

²¹⁰ Read, T. (Feb 2010). *The Future of Our Children's Education: Providing the Best Textbooks for the Next Generation*. Windsor, UK: International Education Partners for PATA .

The biggest problem with the capitation grant system of procurement was the inability of government to maintain the value of the grant in line with inflation and the deterioration in the value of the Tanzanian Shilling. Every year from 2000 onwards, the purchasing power of the capitation grant decreased until schools could no longer acquire and maintain sufficient textbook stocks from their capitation grants. In this situation, the procurement of stocks of reading books to support literacy became a low priority for most schools.

Since 2013 the government has ‘recentralized’ the capitation grant component for TLMs and told schools that the PMO–RALG central government office would centrally procure books financed with 40–50% of each school’s capitation allocation. In practice, they purchased almost no books in 2014/15. This confused schools but resulted from a lack of Treasury releases and a central government assumption that head teachers could not be trusted and would misappropriate their capitation grants. In 2016, the new government is offering to make school capitation grants for TLMs regular again and paid directly to schools, but it is still unclear how TLMs will be provided and thus how the grants will be used. With so many policy uncertainties there is an urgent need for a new policy engagement with government in order to create a more effective system of TLM supply.

In 2014, the DFID-funded PESP supplied 18.5 million textbooks and more than 800,000 teachers’ guides to primary schools (see Appendix 2 for more details).

4.4 Tanzanian Bookselling and Distribution Capacity

In the past eight years, textbook procurement by the government has been unpredictable and irregular. This has not provided a conducive environment for the growth of bookshops and the extension of a bookselling network with national coverage. Booksellers have, despite this, managed to meet the challenges of book provision to all primary schools in the country on multiple occasions. In the final stages of the Pilot Project for Publishing (SIDA

funded, ended 1999/2000), publishers supplied all books to district level education offices. From 2000 up to 2007, the government disbursed funds for the purchase of books at the school level. One condition for any bookseller supplier was to have authorization from the Booksellers Association of Tanzania (BSAT). During this period BSAT had over 150 members who paid an annual subscription equivalent to US\$300. In 2012/2013, as part of the Primary Education Support Project (PESP), ten major booksellers distributed school textbooks to all schools in the country. The efficiency of book distribution has been greatly assisted by significant upgrades to the national road network that have taken place over the past decade.

In the past, the state-owned Tanzania Elimu Supplies (TES)—now closed—had its own fleet of trucks funded by donors but failed to maintain the fleet in operational condition due to a lack of funding allocation for maintenance services and spare parts.

The removal of textbook purchasing responsibility from schools through the potential removal of capitation grants for TLMs could portend a return to the state-organized textbook distribution which failed to operate well or to achieve sustainability and accountability in the past. The return to state-organized textbook distribution could also mean the destruction of a portion of Tanzania’s retail bookshop network for the second time.

4.5 Teacher Training Issues

All visited schools requested more teacher training on reading book usage and stock management. They were interested in the basic pedagogical techniques of using reading books in class to support literacy achievement and wanted more training on these techniques. They also wanted more guidance on how to set up and run school and classroom libraries.

4.6 Financing

The advent of the Primary Education Development Project (PEDP) in 2000 established a basic capitation

grant²¹¹ for primary schools of TSh10,000 per head per year, of which TSh4,000 was recommended to be used for school textbooks and supplementary materials and TSh6,000 was allocated for school operational and administrative costs and the purchase of consumable supplies. The textbook component was calculated to provide a sustainable ratio of one textbook per three students for each of the six textbooks specified for use in the revised primary curriculum.²¹² Unfortunately, the capitation grants were not ring-fenced, thus there was no certainty that the funds that actually reached schools would be used for the intended purposes.

In 2000, the average mid-point US\$/TSh exchange rate²¹³ for the year was TSh790 to US\$1. Thus the school capitation grant was worth the equivalent of US\$12.68 and the TLM component of the grant was worth an effective US\$5.06. The table below shows the average annual mid-point exchange rates over the 10-year period from 2000 to 2009 plus the more current 2015 exchange rate.

Figure 5: Tsh to US\$ exchange rate, 2000–2015

Year	Tsh to 1US\$
2000	790
2001	805
2002	1,020
2003	1,050
2004	1,090
2005	1,130
2006	1,170
2007	1,300
2008	1,160
2009	1,300
2015	2,148

On the basis of the quoted exchange rates, the value of the TSh in 2009 had fallen by 40% since the original primary capitation grants were set at TSh10,000 per year. This is important because all raw materials for textbooks are purchased in US\$.

In 2007, the number of required textbooks in the primary curriculum was increased from 6 to 9.²¹⁴ This policy should have been accompanied by a proportional increase in the capitation grant, but it was not. At the same time, the cost of raw materials and printing from 2000 to 2009 increased by approximately 15%. Combined, the impact of inflation and currency devaluation during this period had reduced the effective purchasing power of the capitation grant by at least 55%, while the curriculum textbook requirements had been increased by 50%. On this basis, the total capitation grants should have risen to at least TSh21,000 per student in 2009 to maintain parity with the original capitation allocations in 2000. Likewise, the annual capitation grant component for primary school textbooks should have increased from TSh4,000²¹⁵ in 2000 to TSh9,240 in 2009 to maintain the original purchasing power and accommodate the increased number of required textbooks. In reality, capitation grant allocations were reduced despite continued overall increases in the education budget. The total primary capitation grant reached a high of TSh13,000 in 2006 but had been reduced to TSh6,000²¹⁶ in 2008–9, with TSh3,150 notionally allocated to TLMs. This was approximately one third of the value required to reach and maintain the target textbook and reading book ratios and the targets in primary schools established in 2000 by the PEDP.

The introduction of a new primary curriculum in 2007 was accompanied by a ministry embargo on the use of all old curriculum books. Thus, old textbook stocks in schools that had accumulated since 2000 were

²¹¹ The capitation grant is separate from the school development grant which is intended to fund school construction and maintenance.

²¹² English, Hisabati, Sayansi, Stadi za Kuzi, Kiswahili, and Maarifa ya Jamii.

²¹³ The mid-point exchange rate is the median rate between the buying and selling rates.

²¹⁴ English, Historia, Kiswahili, Sayansi, Jiografia, Historia, Sanaa na Michezo, Sayansi Kinu, Sayansi Kilimo and Siasa.

²¹⁵ Calculated as TSh10,000 x 1.4 (for currency devaluation) x 1.5 (to cover the costs of an increased curriculum requirement for textbook titles) x 1.1 (for printing cost inflation).

²¹⁶ Based on data in the Oct 2009 Public Expenditure Tracking Survey for Primary and Secondary Education in Tanzania Final Draft Report, page 4. This figure is not strictly comparable to the 2000 allocations because it also includes the value of the Development Grant. Thus TSh6,000 is actually a high-side figure.

discarded, but there was no increase in the capitation allocation to cover the significant additional cost of a complete re-stocking with new curriculum textbooks.²¹⁷ This, compounded by the falling value of the capitation grants,²¹⁸ is reported to have significantly reduced textbook stocks in schools.

In 2015, 16 years after the introduction of the original PEDP capitation grant, the grant per primary school pupil is still set at Tsh10,000 (US\$12.6), of which Tsh4,000 (US\$5) is allocated to the procurement of TLMs. However, tracking studies have found that, in most cases, only 30–50% of the per capita grants actually reach schools, and when they do may only have Tsh2,000 available for the purchase of TLMs. Based on prevailing exchange rates, this is equivalent to US\$0.93 per student, compared to the value of the original grant for TLMs which was US\$5.06. However, this does not take into account 16 years of inflation and currency devaluation and the increase in the number of required textbooks. Recent information from the MOEVT suggests that when the government starts to supply monopoly textbooks to schools, it will reduce the capitation grant further by retaining the amount that should be spent on TLMs. This will guarantee that schools will have no budgets to buy reading books.

Capitation grant allocations by government are not the same as the amounts actually released which can be significantly less. When the grants reach schools, they may not be wholly used for their intended purposes, making the funding actually spent on textbooks and reading books significantly less than the allocations. Aside from diversion of funds, timing of payments also remains an issue. Even during the operation of the PEDP, there were problems with the regularity and timing of the release of capitation grants. The PEDP Implementation Completion Report (ICR) noted that there were bureaucratic delays in the channeling of funding to the District Councils and further delays

in the speed with which the capitation grants were released by the District Councils to schools. In some cases, the Councils never released all of the funding to schools. Also, the release of funding in four equal quarterly tranches, often later in the school year, meant that schools had problems procuring sufficient textbooks and reading books for the beginning of the school year. Often, schools considered other expenditures more important or pressing than textbook and reading book procurement. The TLM funding crisis was summed up by the Education Sector Development Committee as follows:

“The pressure on the education system due to increased enrollment has been intensified, while the resource envelope for education has not kept pace with... enrollment pressure ...The short supply of teaching and learning materials ... poses challenges to the quality of education against the rapid expansion of the education sector.”²¹⁹

Since 2010, the MOE has announced that it intends to cancel the capitation grant policy in which schools use an annual cash grant to select their required TLMs from an MOE-approved list of textbooks and supplementary materials. Instead it will move back to a state-published monopoly textbook system in which government will distribute textbooks directly to schools. TIE will develop the new curriculum, write and edit the new textbooks, develop the illustrations, design page layouts, and undertake typesetting, publishing, manufacturing, and distribution. However, there are indications of a new political will to reform, and this policy may be amended with a more limited capitation grant allocated to schools for reading book ordering. However, the uncertainty over the future of capitation grants and the mechanisms for financing TLMs supplies to schools adds to current TLM policy confusion and adversely impacts schools.

²¹⁷ The capitation grant levels were calculated to be sufficient to maintain and improve target textbook:student ratios. The need for complete re-stocking went far beyond maintenance and should thus have attracted significant additional funding if previously achieved textbook levels were to be re-established.

²¹⁸ Kimaro, Y. (2010, January 5). *Daily News*.

²¹⁹ Education Sector Development Committee. (Sept 2009). *Annual Performance Report for the Joint Education Sector Review*, pp8–9.

4.7 School Management and Usage

There is no available data or reports on school management capacity with particular relevance to TLMs. School visits and interviews reported that the MOEVT encourages reading book usage in schools but that no practical guidance had been given to schools/teachers on how best to do this. Storage, particularly in rural government primary schools, was widely reported to be sub-standard. This was confirmed in the visited schools, and general TLM management was poor or largely absent. None of the visited schools had classroom libraries, and only 1 out of 4 schools (urban) had a school library. There was a lack of any understanding about how school and classroom libraries could be organized and used to support reading and literacy. None of the schools or teachers were aware of basic reading techniques such as silent reading, story time activities, or the use of paired reading. Schools were also unaware of the impact that physical production specifications have on a book's useful classroom life. In response to this situation, the current wave of big donor-financed early grade reading programs are all allocating more time and resources to reading in early grades (e.g., EQUIP-T DFID, Tz-21 USAID, UNICEF, GPE LANES, etc.). See Appendix 2 for details.

4.8 Digital Opportunities

It is unlikely that the distribution and use of digital reading books will emerge in government primary schools in the short to medium term. However, eKitabu in Nairobi has private school customers in Tanzania, so the possibility of a limited development of digital reading books in some of the better-funded private schools is a possibility.

5. Discussion and Opportunities for a Global Book Fund

Within the MOEVT there is an acceptance that primary school reading levels are lower than they should be. The annual Uwezo report on primary school performance emphasizes this achievement

gap. There is also an acceptance that the provision of primary reading books and their effective use in classrooms would be a way of addressing the prevalent literacy problem. *The subsidized provision of suitable primary reading books via a GBF project in Tanzania would therefore be potentially attractive to the MOEVT.*

The use of Kiswahili as the single LOI for all primary and secondary schools combined with a large primary school population of around 8.5 million could enable large print runs of 300,000 to 1 million copies for each title. *If the GBF could reduce risk and delays in payment to publishers along with the large print runs, significant price reductions should be achievable.*

There are significant Kiswahili populations in neighboring countries (e.g., Zanzibar, Kenya, Uganda, Burundi, and Rwanda), which might allow for additional market opportunities and further enlarged print runs. Aside from Zanzibar, none of these countries use Kiswahili as an LOI at the primary level, which would limit the potential. However, in those countries where Kiswahili is taught as a primary curriculum subject (e.g., Kenya), there would be more interest in the purchase of GBF-subsidized primary reading books.

The combined authorship and publishing resources of Tanzania, Kenya, and Uganda would provide sufficient local capacity to develop a new generation of decodable and levelled primary reading books in Kiswahili.

In Tanzania, the accountable and sustainable distribution of reading books to all primary schools nationwide remains a problem. The commercial book distribution network does not have the capacity to handle effective distribution to schools in rural areas. Previous state-run distribution efforts, such as the now defunct state-owned Tanzania Elimu Supplies (TES), have also proved unsuccessful in national distribution. The use of professional haulage companies selected via a competitive tender would probably produce the best results but would be expensive, providing a significant opportunity for impact of a GBF.

In the short to mid-term, a national digital framework for the use of readers in government primary schools is unlikely. There is the possibility for a limited digital framework for the use of readers in elite private schools in urban areas, and an increase in the availability of smart phones could be used to support a digital reading framework, although health concerns remain in using small screen sizes for early grade reading practice.

Lastly, stakeholders have commented that there is a need to re-engage with the government of Tanzania on the development of a new approach to TLM provision and that this could be a suitable entry point for a GBF in Tanzania. In-country program components to ensure the effective use of any GBF materials provided to schools and the longest book life in classrooms should include the following:

- ▶ School and teacher training in the effective use of primary reading books in class to support literacy and to develop a lifelong reading habit
- ▶ The design of simple TLM stock management systems and a stock management handbook as well as school and teacher training in the use of these systems²²⁰
- ▶ Training in book conservation and repair along with the involvement of local communities in these activities
- ▶ The review of EMIS data collection targets and methodologies to ensure that the MOEVT has access to the right information in order to manage and plan TLM supplies to schools efficiently

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²²⁰ It should be noted that loss and damage in distribution and in school management of TLM stock usually represent the highest cost components in TLM provision to schools.

Read, T. (Feb 2010). *The Future of Our Children's Education: Providing the Best Textbooks for the Next Generation*. Windsor, UK: International Education Partners for PATA.

Read, T. (July 2015). *Where Have All the Textbooks Gone?* Washington, DC: World Bank.

SEDP Implementation Completion Report. (June 2008). Washington, DC, USA: World Bank.

7. Appendix

7.1 Appendix 1: Interview List

Organization Type	Contact
Publishers	Mangrove Publishers – William Mkufya
Publishers	Kwanza Publishers – Lipangala Minzi
Publishers	Aidan Publishers – Leila Mirola
Bookseller/Distributor	General Booksellers – Sungura Sadallah
Implementers	Children's Book Project – Marcus Mbigili
Implementers	Room to Read – Prisca Mdee
Schools	Maktaba Primary School – Job Ndugusa
Schools	Kisiju Pwani Primary School – Msahan Joffrey
Schools	Boko Primary School
Schools	Mtambani Primary School – Neema Mushi
Ministry of Education	Ministry of Education and Vocational Training – C. Mgimba, Deputy P.S., and Khadija Mcheti, Deputy Commissioner for Education
Ministry of Culture	MOC – Tanzania Library Services Board – Lusekelo Mwaghelo and Alli Mcharazo

7.2 Appendix 2: Donor/NGO Activities

The majority of donor support has been aimed at supporting textbook provision for government schools. Support for reading books has not been provided on a national basis but has been significant in some districts. The main donor-funded inputs are described below.

Children's Book Project

Major project activities include (a) in-service teacher training in the use of books in the classroom in support of literacy, based on learner-centered methodologies; (b) the identification of highly motivated and committed lead teachers to become future teacher trainers; (c) the purchase of reading materials in order to increase access and availability of books in program schools; and (d) book sector training via support to writers' associations, illustrators, publishers, and booksellers with the aim of increasing professionalism and local capacity. CBP supports the publishing and production of some reading materials for use in the reading program schools. It also supports the purchase of Braille books in program schools.

Achievements of the CBP in 2015:

- ▶ 3,575 teachers have been trained in learner-centered methodologies of teaching reading and writing as well as library establishment and management.
- ▶ 262 Lead Teachers have been trained in facilitation skills and project monitoring.
- ▶ 308 titles of children books have been produced and disseminated to schools. (up to December 2014)
- ▶ 5 Big Books have been published, authored by teachers in collaboration with their students. In return, publishers of the books pay royalties to the teachers and schools.
- ▶ Support to five zonal writers' associations and 24 training sessions to illustrators as well as the Reading Association of Tanzania.
- ▶ 201 program schools have established school libraries with effective lending systems.

DFID EQUIP-t program has distributed SRMs produced by Children Book Project as listed below.

Item No.	Qty	Technical Specifications and Standards	Name of Goods or Related Service
1	3,800	Book: Majigambo ya Mwezi na Jua Large Book Format, Approx. 350 mm × 500 mm	ISBN 9987210783 Published by CBP/Readit Books
2	3,800	Book: Kondoo na Kicheche Large Book Format, Approx. 350 mm × 500 mm	ISBN 9789987100491 Published by CBP/Mture
3	3,800	Book: Hadithi ya chopeko Large Book Format, Approx. 350 mm × 500 mm	ISBN 9976967918 Published by CBP/Mture

DFID-Funded PESP

This was a two-year (2011/12–2013/14) project aimed to procure and distribute books and desks to all primary schools in mainland Tanzania. PESP aimed at improving the quality of primary education by providing necessary textbooks to schools. Overall this was a successful project with positive outcomes. Over 18.5 million textbooks and 886,724 teachers' guides were procured from private sector publishers using a limited tendering process based on titles selected by MOEVT from the EMAC approved list of titles at an average unit cost of US\$1.68. The PCR, dated December 2014, made the following points:

- ▶ Average unit textbook costs were US\$1.68
- ▶ Production specifications were above the WB minimum standards for textbooks and were intended to be durable in order to achieve long classroom life
- ▶ There were complaints about the content accuracy of some of the selected textbooks and their conformability with the published curricula; EMAC was disbanded as a result of these complaints in 2013
- ▶ Poor quality EMIS data was a problem in project implementation
- ▶ DFID invested in a national website to provide schools and parents with delivery information and to control corruption

GPE Program for Tanzania (LANES)

Tanzania's Education Sector Development Program²²¹ covers the period 2008–2017. The ESDP for Mainland Tanzania is focused on improving the quality of basic education, ensuring equitable access, and training teachers. Tanzania received a GPE grant of US\$100 million. The grant was divided into two allocations:

- ▶ US\$94.8 million for 2014–2017 for Mainland Tanzania
- ▶ US\$5.2 million for 2013–2016 for Zanzibar

The GPE-funded programs in Mainland Tanzania have led to the following outcomes:

- ▶ Developed a new curriculum for reading, writing, and math
- ▶ Trained 18,680 teachers and facilitators in the new curriculum
- ▶ Provided 16,000 primary schools with new learning materials

The GPE LANES program is developing and will print new primary curriculum materials, including SRMs

USAID TZ-21

The Tanzania 21st Century Basic Education Project (TZ21) aims to improve the education provided to children in 900 lower primary schools in the Mtwara region plus the islands of Pemba and Unguja in Zanzibar. By enabling teachers to teach reading,

²²¹ Government of Tanzania. (2008). *Education Sector Development Programme* (2008–2017). Retrieved from <http://www.globalpartnership.org/content/tanzania-education-sector-development-programme-2008-17>

math, and science more effectively, the program is boosting learning outcomes—especially in early grade reading. TZ21 is being managed by Creative Associates who have been working in Tanzania since 2011. Since 2013, TZ21 was retrofitted into a reading program with the CBP as a subcontractor with 2 modalities for book development. The first was the procurement of published titles through CBP and the second being

a more bottom up approach of developing teacher authorship. TZ21 has developed/produced 27 titles and distributed a total of 229,788 copies of these titles to all schools in Mtwara Region and Zanzibar. These supplementary readers target Standards I–IV. In addition, an anthology reader has been developed for Standard I and 41,576 copies were produced and distributed into schools in the same regions.

Global Book Fund Country Study

UGANDA

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1. Methodology

The Uganda country study was conducted by Alice Ibale, consultant for International Education Partners (IEP), over the course of September 2015 – January 2016. The country background and context research for this study was conducted in the UK by IEP. The goal of the study was to identify the challenges, constraints, and opportunities across the books value chain, particularly for primary grade reading books, and to assess the feasibility of a potential Global Book Fund. The country study was based on a combination of literature review and in-person interviews with key stakeholders.

The interview list (Appendix 1) includes representatives of all the main stakeholders in the primary reading book chain, both public and private, including urban and rural government and private primary schools, project implementers, publishers, printers, booksellers, donors, and government actors.

A draft version of the study was circulated to stakeholders for comments in February 2016, with the report then finalized in March 2016.

2. Country Context

2.1 Background and Education System

Uganda has been an independent country since 1962, with a geographic area of 241,038 square kilometers.²²² The current population is approximately 37 million, with an average annual growth rate of 3%. 16% of the population live in towns and cities and the remaining 84% live in rural areas.²²³ Uganda is broken up into the following administrative regions shown in Figure 1.

Figure 1: Map of Uganda



The national gross per capita income of Uganda was US\$670 in 2014,²²⁴ giving Uganda a world human development index ranking of 163.²²⁵ The World Bank estimates that 19.5% of the population was below the poverty line in 2012.²²⁶ Uganda has the world's second youngest median age at just 15.6 years old.²²⁷

Figure 2: Education as percent of household expenditures²²⁸

	05/06	09/10	12/13
All Uganda	9.6	8.5	7.5
Rural	8.0	7.1	6.3
Urban	13.1	11.8	9.3

²²² CIA. (2016). World Factbook. Retrieved 2016, from <https://www.cia.gov/library/publications/the-world-factbook/fields/2177.html>

²²³ Ibid.

²²⁴ World Bank. (2016). Data – Uganda. Retrieved from <http://data.worldbank.org/country/uganda>

²²⁵ UNDP. (2015). Human Development Report 2015. Retrieved from http://hdr.undp.org/sites/default/files/2015_human_development_report.pdf

²²⁶ World Bank. (2016). Data – Uganda. Retrieved from <http://data.worldbank.org/country/uganda>

²²⁷ CIA. (2016). World Factbook. Retrieved 2016, from <https://www.cia.gov/library/publications/the-world-factbook/fields/2177.html>

²²⁸ Uganda Bureau of Statistics. (2014). Uganda National Household Survey 2012/2013. Retrieved from http://www.ubos.org/onlinefiles/uploads/ubos/UNHS_12_13/2012_13%20UNHS%20Final%20Report.pdf

Figure 3: Uganda Primary School Statistics (2014)

	Total	Public	Private
Number of Schools	18,079	13,123	4,956
Teachers	171,000	156,051	14,949
Pupil:Teacher Ratio	1:46	1:54	1:29
Pupil:Classroom Ratio (including temporary)	58:1	68:1	31:1
Pupil:Classroom Ratio (permanent classrooms)	73:1		
Enrollment (millions)	8.77	8.34	0.43
Boys	49.9%		
Girls	50.1%		
aged 6–12 years	82%		

The Education Budget as a percentage of GDP was 3.3% (2012).²²⁹ Education is the 4th highest household expenditure after food, utilities and transport, and communications (Figure 2).

The education system comprises 1–2 years of pre-school (just being introduced), 7 years of primary, followed by 4 years of lower secondary (up to O level) and 2 years of upper secondary (up to A level). Statistics for primary school enrollment, facilities, and staffing are shown in Figure 3 and demonstrate the equality of gender enrollment and inequality of facilities for public vs. privately educated students.²³⁰ Pre-school enrollment increased by 17% between 2012 and 2013 to 416,453. Primary school enrollments increased by 0.6% in the same period. Gender equity is now largely established for both pre-school and primary sub-sectors.

The official performance rating for progress to universal primary education (UPE) and literacy targets was slow. Indeed, youth literacy has fallen from 87.41% in 2010 to 83.66% in 2012.²³¹ Literacy

rates also vary significantly by rural and urban areas, with urban literacy higher.

2.2 Country Language Profile

In 1989, the Education Policy Review Commission identified 25 main Ugandan languages.²³² By September 1999, the National Curriculum Development Center (NCDC) circular entitled Teaching of Mother Tongue in Primary²³³ identified 63 Ugandan languages, a number broadly confirmed by the Institute of Languages at Makerere University (MUK). It seemed that larger language groups had begun to break down into smaller and more distinct local variants and dialects, leading to the growth in identified Ugandan languages. However, within this diverse and often complex and mixed linguistic environment there are a number of larger generalized language groups that have served in the past as regional Languages of Instruction (LOIs) in the form of Main Area Languages—(MALs)—for an estimated 80–90% of the population.

²²⁹ Ibid.

²³⁰ MOEST. (2015). Annual Primary Performance Assessment for 2014.

²³¹ UNESCO Institute for Statistics. (2015).

²³² Ibid.

²³³ Teaching of Mother Tongue in Primary. (1999). Circular Reference CD/P/MT/14 of 30/9/1999.

Figure 4: Most Common Languages in Uganda (2002)²³⁴

Language Group	Language	Speakers (million)	Lower primary LOI, 2016
Luganda	Luganda (Ganda)	4.1	✓
	English (2nd language)	2.5	
Runyakitara ²³⁵	Runyankole	2.3	✓
Luganda	Soga	2.1	✓
Runyakitara	Chiga	1.6	✓
Ateso	Teso	1.6	✓
Luo	Langi (Lango)	1.5	✓
	Acholi	1.2	✓
	Masaaba	1.1	✓
Lugbara	Lugbara	0.8	✓
Ateso	Nga'karamajong	0.7	✓
Runyakitara	Nyoro	0.7	✓
Luo	Alur	0.6	
	Lukonzo (Konzo)	0.6	✓
Runyakitara	Tooro	0.5	

All of the above languages had access to established orthographies which often were formalized and approved in the 1940's, 50's, and 60's. In 2005, following the issue of MOEST Circular 3/2005 on the new rules for the use of a local language as an LOI in lower primary grades, both Lukhonzon and Lusoga submitted applications to the MOEST to be recognized as LOIs.

The Uganda Ethnologue identified 41 local languages in Uganda and noted the problems of multiple dialects in some language groups as well as declining inter-comprehensibility between the constituent languages of some language groups, which hindered the selection of a local language as an LOI. The 15 most commonly spoken languages with corresponding language groups and estimated number of speakers are shown in Figure 4.

There are organizational and cost implications in attempting to provide trained language teachers, learning materials, reading books, and reading/writing learning methodologies to such a wide range of local languages, particularly when there are already significant resource constraints in the system. In schools visited in 2005 as part of the primary curriculum review, it was apparent that many, probably a majority outside Luganda speaking areas, were attempting to teach literacy in local languages without:

- ▶ Established local language orthographies
- ▶ Suitable course materials and teaching/learning aids to support the acquisition of reading
- ▶ Reading books and other printed learning and teaching materials
- ▶ Teachers trained in the LOI in use (or sometimes without teachers who were even fluent, confident, or familiar with the LOI in use)

²³⁴ SIL. (2003). Languages of Uganda: An Ethnologue Country Report.

²³⁵ Artificial regional language invented by MUK in the 1990s, incorporating elements of Runyoro, Rutoro, Runyankore, and Rukiga. Many in the southwest perceive Runyakitara as an attempt to re-establish the historic Banyoro hegemony/influence in the region and thus are deeply resistant. There seems to be much greater support for the establishment of two language groupings – Runyankore/Rukiga and Runyoro/Rutoro.

- ▶ Well-developed reading and writing strategies.
- ▶ Developed skills in the teaching of reading and writing in any language

Under these circumstances, it is not surprising that the achievement of early literacy in any language had become a problem for a majority of students. Even where course materials and reading books may be available in the marketplace, they are not present in a great majority of schools in the quantities required. Reasons for this include: (a) they cannot be purchased as part of Instructional Materials Unit (IMU) supplies because they have not been competitively approved; (b) UPE funds are insufficient to purchase materials in the required quantities; (c) publishers no longer publish many local language materials, particularly in the smaller language groups, because there is no obvious market for them; (d) booksellers do not stock local language books and materials unless there is a proven and reliable market; and (e) many parts of rural Uganda have no easy access to bookshops anyway.

Chatry-Komarek²³⁶ defines the causes of illiteracy as:

- ▶ Poor language policies
- ▶ Deficient teacher competence and training in the language used as the LOI
- ▶ A lack of educational materials (in the language of reading acquisition)
- ▶ The absence of a literate environment in homes and schools
- ▶ Dramatically reduced teacher/pupil contact hours
- ▶ Over-crowded classrooms

All of the above factors were present in a majority of Ugandan classrooms. The same author commented that

*“... the use of a familiar language in the classroom does not guarantee fluent reading. Children also need appropriate learning activities and motivating reading materials.”*²³⁷

2.3 The Evolution of LOI Policy in Uganda

The 1992 Education Government White Paper (GWP) amended the recommendations of the Education Review Commission as follows:

“The LOI in rural areas was specified as the relevant local language for P1-4 and English for P5-7. English was specified as the LOI in all urban areas for P1-7. English and Kiswahili were specified as compulsory languages in all schools from P1-7 with the intention of gradually switching to Kiswahili as the national language and the dominant LOI.”

Relevant area languages were recommended to be taught as subjects in both urban and rural areas. Local language examinations, as part of the Primary Leaving Examination (PLE), were optional, although the Uganda National Examinations Board (UNEB) was required to provide exams in the 5 specified main area languages for those who wished to take them. It is notable that the recommendation in the Education Review Commission Report relating to the need for the LOI to have supportive literature was omitted from the GWP.

As far as Districts and schools are concerned, the Local Language Policy for primary education in 2000 was provided by a September 1999 National Curriculum Development Center (NCDC) Circular. In summary, this circular provided the following policy guidance:

- ▶ *“Mother Tongue or the most commonly used area language should be the LOI for P1-4*
- ▶ *All schools should select as a LOI only languages with a developed orthography*
- ▶ *Where the LOI is not understood by all learners’ special attention should be given to learners who do not understand the language*
- ▶ *In urban areas where mother tongue might be difficult to use as a LOI, English may be used*
- ▶ *Local languages could (sic) be taught as a subject*
- ▶ *All instruction for P5-7 will be in English”*

²³⁶ Chatry-Komarek, M. (2003). Literacy at Stake. Windhoek, Namibia: Gamsberg Macmillan (p. 1).

²³⁷ Ibid. (p. 4).

The policy guidelines produced above made no reference to the availability of suitable learning and teaching materials, the importance of supportive children's literature in the LOI, and the availability of teachers with specialist skills in the relevant local language(s) as conditions for the selection of a local language as an LOI. The guidelines did not squarely address the pros and cons of the use of local minority languages and dialects of limited extent versus developed area/regional languages of wider communication and leave this critical issue to the determination of each District. They refer to "...a developed orthography..." rather than to "...an approved orthography...". The very general nature of the guidelines left wide latitude for differing district-level interpretations.

The overall trend of the shifts in local language policies over the years seems to be *de facto* away from the development of major area languages toward the encouragement of local languages of more limited extent. This trend was paralleled by the failed attempt to introduce Kiswahili as a compulsory language for all primary grades and originally intended to replace English as a national language.

The Primary Curriculum Review Report²³⁸ recommended an organized national policy shift to the use of MALs as LOIs in lower primary grades and a simultaneous shift to a thematic curriculum focusing strongly on the teaching of literacy and numeracy first, with other required subject content taught not as subjects but as themes within literacy and numeracy lessons. In order to reduce the costs of multiple local language materials provision, the thematic curriculum was designed to be taught without textbooks in P1–3 but with specially designed, user-friendly teachers' guides; local language resource books of traditional stories, rhymes, and word games; and a limited number of class sets of local language reading books.

The Road Map to Primary Curriculum Reform²³⁹ recommended the following minimum criteria for the selection of a local language as LOIs:

- ▶ The main area languages should be formally established as acceptable LOIs for Ugandan schools. Any district or school using an MAL will not need formal approval from the MOEST, although the MOEST should formally be notified of the District Local Language Policy to use an established MAL
- ▶ All districts wishing to use a language that is not one of the MALs should be required to submit their proposed local language policy to the MOEST for approval (not just for information) along with evidence that it meets the minimum criteria specified below
- ▶ An MOEST National Advisory Board for Languages should be established to provide assistance to MOEST to review, vet, comment on, and recommend orthographies for local languages submitted as potential LOIs. This Board would meet on an occasional basis as required
- ▶ The minimum criteria for a local language to be approved by the MOEST as an LOI should be:
 - An established and approved orthography
 - An established literature suitable for young learners in P1–4
 - Evidence that there is the capacity to provide good quality language training to primary teachers in the proposed LOIs, i.e. via local language modules in a local primary teachers college (PTC)
 - Undertakings that the district will provide schools with the necessary reading support materials to underpin the early achievement of literacy
- ▶ Local community languages/dialects, spoken only in limited areas, which do not meet the minimum criteria can be used as the oral medium of instruction and support in lower primary grades, but literacy should always be taught in a language that meets the minimum criteria specified above

²³⁸ Read, T., and Hicks, R. (2005). Primary Curriculum Review Report. RNE for the MOEST.

²³⁹ Enyutu, S., and Read, T. (Feb. 2006). Primary Curriculum Review Road Map. RNE for MOEST.

- ▶ Local languages should be used as the LOI from P1–4 except where there is no obvious dominant language and/or where pupil intakes provide for a mixed language situation among enrolled students where there is no obvious dominant local language; in this situation, the default LOI normally should be English in both urban and rural areas
- ▶ Main area languages can be learned as subjects from P5–7 and should be examinable as part of the PLE
- ▶ The LOI should also be the language of assessment and evaluation in appropriate grades

These recommendations were largely accepted by the MOEST in 2006, although not all of them have yet been fully implemented.

Area Language Boards had been approved by the MOEST in order to support local language development and the achievement of recognized orthographies in Samia Bugire, Luganda, and Dophedhola, covering 10 districts in the East. The Area Language Boards have been reinstated for the languages that are to benefit from the EGRA materials. This new development would also be important especially in recognition of the support from USAID.

The National Curriculum Development Centre (NCDC) has published early grade reading books in 4 local languages and English as publishers of last resort.

Appendices 2 and 3 provide a list of districts and local languages not covered by current donor-funded projects and a list of districts and languages that are targeted for coverage by 2017. Donors are cooperating in the funding of a primary school language mapping exercise to determine more accurately local language primary grade reading book print runs and to facilitate distribution schedules for different local language editions. Despite the fact that the use of local languages as LOIs has been a government policy since 2007, the Uganda EMIS is still not providing grade level enrollment data on languages used as LOIs and on school locations by LOI.

Overall, parents and community groups have supported the use of local languages as LOIs, but a

substantial minority involved in the parent focus group discussions for the Primary Curriculum Review (35%) still considered that the use of local language as the LOI in P1–4 might delay and therefore hinder their children in the acquisition of English. Literacy in English, even with parents who strongly support the use of local languages as LOIs in lower primary, was generally more valued by the community than literacy in local languages. Community groups also wanted to be consulted about the choice of language to be used in their school rather than leave this as an imposed district-level policy. There have been examples of local communities refusing to accept district local language policies in their schools. There was often widespread concern among many of the smaller local language groups that a rival local language might be imposed on them, which would separate their children from their own language, background, and culture and imbue them instead with the attributes of a historic rival language and culture. In this situation, most communities would rather use an MAL or English as the LOI than an imposed rival/alternative local language. For this reason, six Banyabindi community schools in Kasese District refused to accept Lukhonzon as the official district LOI and lobbied instead for English.

Because Uganda operates an early exit strategy from local languages as the LOI and the use of English as the LOI after the transitional P4 grade, there is concern with the rapid development of English language skills in lower primary grades. Thus, there will be a demand for the provision of English and Kiswahili reading books alongside local language reading books in any GBF intervention.

3. Current Print and Digital Reading Book Provision

By 2004/05 USAID, DFID, and the World Bank support for textbook and supplementary materials provision via the Instructional Materials Unit of the MOEST had achieved textbook/student ratios for main subjects in lower primary of around 1/2. By 2014, according to the 2014 annual school census, English had the best

level of textbook stock at every primary grade level, with 3 to 4 pupils sharing a book in lower primary. In mathematics, up to 7 pupils shared a book at lower primary, and at upper primary it was between 4 to 7 pupils to a book. Social studies had the least textbook stock, with up to 24 pupils sharing at lower primary and up to 8 pupils sharing at upper primary (2014 Annual School Census). However, these data do not take into account the fact that those schools using local languages as LOIs in lower primary grades were not supplied with local language textbooks but only with local language teachers' guides, resource books, and class sets of 1 or 2 readers. In 2012/13, the MOEST supplied 1,375,000 textbooks to P4 plus 400,000 supplementary materials for P2. Subsidies of 40% were provided for local language materials for P3 and P4.

In 2013, according to the Education Sector Annual Performance Review, literacy and primary grade reading book provision were priorities for MOEST. Unfortunately, progress in the achievement of these priorities was limited and the Annual Performance Review cited the following reasons for the lack of progress:

- ▶ Rapid Primary Population Growth of 3.5%
- ▶ High % of youth below the age of 14 (50%)
- ▶ Reduction in SNE enrollments caused by poor facilities and hostile parental/community attitudes
- ▶ Inadequate funding through budget cuts; inadequate primary capitation allowances
- ▶ Great regional differences in competences and performance
- ▶ Famine in Karamoja, which diverted education budget funding
- ▶ Shortage of infrastructure and facilities
- ▶ High teacher absenteeism of 20%; on average teachers absent from class two days per week
- ▶ Limited community participation to support UPE

The provision of reading books in English or local languages has not been adequately financed for many years, and there are acute shortages of reading books in all primary classes except where donor projects are operating. MOEST commented that it

had supplied very few reading books in any language to government primary schools since 2009 when the DIMP project (see below) was scrapped. This statement was confirmed by the interviews with schools and publishers. The MOEST characterized the availability of reading books in any language in government primary schools as "poor." MOEST has provided little practical support to schools for reading development and literacy upgrading. There is no official within MOEST responsible for school and classroom library development. USAID and GPE are in the process (2015) of providing local language materials and support in 12 languages. Details of USAID/GPE-funded projects, the Districts where this support is being provided, and the languages receiving support are provided in Appendix 3.

There is no MOEST data available on the percentage of primary schools with access to electricity, nor is there data on primary or secondary schools access to the internet nor any data on computer/student ratios at either primary or secondary levels. The annual school censuses for 2012–2014 have not attempted to capture or record any of this information, which suggests that there is little or no detailed planning within the MOEST in primary or secondary for any major school level investments in hardware, systems, and the development of digital media. There are small-scale, donor/NGO-funded pilot projects providing digital resources. For example, in October 2015 Book Aid International launched a partnership project with the National Library of Uganda and World Reader to bring e-readers into Children's Corners. 10 public libraries in Uganda now have 20 e-readers each preloaded with 200 titles to support education and reading, but this is small scale compared to the development of national e-reader provision.

An informed source in the MOEST has noted that while ICT4E investment is considered to be a priority in both primary and secondary government schools and was listed as priority xi out of xi priorities for primary education in 2014, no funds were allocated to it and no activities were recorded for it in the annual primary performance assessment for 2014. Donor-funded projects are providing limited quantities of ICT

hardware and are financing solar panels to improve levels of primary school access to electricity. It should be noted, however, that it is much more expensive to provide solar panels to provide electricity to all school classrooms than to provide power just to the head teacher's office. Under these circumstances it seems unlikely that any digital media developments in support of reading books could be possible on a national scale in either the short or medium term – although developments in individual, elite private and government primary schools in urban areas might be possible.

4. Country Findings and Market Gaps

4.1 *Authorship and Publishing Capacity*

After independence, Uganda moved rapidly to establish state publishing, printing, and distribution under the direction of the newly established Milton Obote Foundation (MOF). The MOF established the Uganda Publishing House (UPH) to act as the state publisher. UPH did not develop school textbook courses itself but sub-contracted Macmillan and Longman to create the monopolistic courses. The state publishing, printing, and distribution organizations did not operate efficiently and were eventually closed down when the USAID-funded SUPER project liberalized school textbook provision, supported the re-emergence of private sector school book publishing, and introduced policies of alternative competing textbooks selected by individual schools and paid for by deductions from an allocated TLM capitation budget. These policy changes have supported the development of a small but important educational publishing sector with at least three significant private sector publishers with the experience and capacity to publish good quality textbooks, teachers' guides, reading books, reference books, and atlases in conformity with the Ugandan curriculum. These three publishers – MK, Monitor, and Fountain – are also regular participants in regional textbook competitive bids in Uganda, Kenya, Ethiopia, and Rwanda and have won important contracts in these countries. All three

are interested in local language publishing, and one of them has pioneered Lukhondo language books in association with Kasere District in the west of Uganda. In addition, there are a number of medium-sized publishers including Baroque, St. Bernard, Mukono Bookshop and Publishing Co., and Joibaso. Monitor has recently sold their publishing business to Netmedia.

For publishers, the inhibiting factors for publishing in many of the local languages are small print runs, limited markets, uncertain and irregular funding, competition by government departments such as NCDC, and the policies of the donors/NGOs who are sometimes investing in the development of local language materials which do not often support local private sector publishers.

According to interviews with publishers, a typical local language reading book print run that would represent an economical proposition to a commercial publisher is 3,000 copies, and the main commercial markets if MOEST funds are not available are up-market private schools and parents. In addition to the school book publishers listed above, UK publishers such as Pearson and Kenyan and publishers such as Moran, EAEP, and Longhorn, etc., maintain branch offices or representatives in Uganda. Makerere University Press is a notable academic publisher of tertiary level books and journals. Mango is a Uganda-based NGO publisher specializing in low cost teachers' aids and reading books. Publishers claim that publishing suffers from cash flow problems and that bank borrowing to finance new publishing projects currently costs 24% p.a. in bank interest charges and that banks will only provide working capital against security – normally a land or building title.

Education is a stated high priority for the government of Uganda, and Uganda was one of the first SSA countries in 1997 to attempt to introduce Universal Primary Education (UPE), which resulted almost overnight in huge increases in primary school enrollments, the need to hire many new teachers (many only partially trained or even completely untrained), the construction of new classrooms

and schools, and the supply of greatly increased TLM print runs. The increased education financing requirement placed great strain on government education budgets which continues to the present. Within the overall education financing constraints, there has tended to be a focus on continued support to teachers, and funding for TLMs has been seen as a lower priority on the grounds that “teachers vote and books don’t.” As a result, much of the current funding for the development of local language reading books is contributed by donors and NGOs and led by USAID (see Appendix 3). Despite the best intentions of government to fund target reforms, including local language policies and a shift to digitalization of teaching and learning, the required funding is constantly reduced by the need to divert budgets to other uses. Government policy also supports economic liberalization which incorporates the interests of private sector publishers. Unfortunately, the full development of local publishing is inhibited by the inability of government to maintain full and predictable levels of TLM funding.

4.2 *Printing*

Ugandan book printing is largely undeveloped, and few publishers place any of their print orders locally, preferring instead to print in Kenya, the RSA, or international print centers such as China, Abu Dhabi, Mauritius, India, and Malaysia – where they claim that they get better prices, terms and conditions, higher quality, and more reliable delivery dates.

4.3 *Procurement*

In 1999 and again in 2003, the MOEST launched calls for bids from publishers to establish a list of primary textbooks, teachers’ guides, reading books, reference books, and teachers’ aids as the basis for an approved list of the TLMs needed to achieve curriculum objectives. Within the MOEST, IMU was provided with budgets to be allocated on a per capita basis to schools so that they could order annually to build up their stocks of TLMs. The procurement and evaluation methodologies used by IMU/MOEST were conformable

with World Bank and best international procurement standards, and the evaluation of submitted bids was supervised by neutral independent specialists. Schools were not provided with cash but were supplied with the approved list, prices, and order forms annotated with the cash budget available for each school to order against. Schools returned their orders to the IMU who used a simple software program to check that schools were ordering within budget.

The school orders were then consolidated into title print runs which were ordered from the publishers for supply to a central MOEST warehouse in Kampala. A second bid selected a distributor to move book stock to district offices. District offices were supplied with copies of school orders as the basis for allocating TLM stock to individual schools. The distribution problems started with inadequate storage at many district offices and continued with the underfunding of stock movements from districts to individual schools, which required schools to collect their books at their own cost. This system operated with reasonable effectiveness until 2009/2010. Thereafter, the MOEST ordered TLM stock and allocated quantities to individual schools. Distribution is still directed to district offices, and the problems of maintaining TLM stocks in district offices and supplying from districts to outlying schools remain.

4.4 *Distribution*

Although there are several good stock-holding educational booksellers in Kampala and one or two in districts such as Mbarara, there is no reliable national network of wholesale and retail booksellers providing genuinely national book distribution coverage. Until 2009, MOEST textbook distribution sub-contracted local distributors – often publishers but sometimes freight agents – to distribute books from Kampala to district offices where there were rarely adequate storage facilities or handling systems. Schools were expected, at their own cost, to collect book stocks from district offices. This was often not very efficient and could be expensive for distantly located schools. In 2015, publishers were required to distribute directly

to schools or to negotiate convenient delivery dates and locations with schools and to pay schools for their travel and collection costs when they arrived to collect their books.

Uganda once had a national bookselling network based on a mixture of private sector and religious booksellers, but this was destroyed by the imposition of a state distribution monopoly in the 1970s. An attempt to re-create a national, district-based bookseller network via the Decentralized Instructional Materials Project (DIMP) from 2004–2009 failed because it attempted to move too fast before established financing and credit arrangements were properly developed between publishers and fledgling district booksellers.

4.5 Teacher Training Issues

Primary teachers consistently commented during the field research for the Primary Curriculum Review²⁴⁰ that local language classes in lower primary grades, and specifically the teaching of reading and writing, were the most difficult teaching assignments in primary schools because of the lack of trained and experienced reading specialists, the absence of suitable instructional materials/reading books, and the scarcity of trained teachers with specific local language knowledge.²⁴¹ Also, in many schools, teachers allocated to lower primary classes are often the least qualified and may not even be very fluent in the local language of instruction.²⁴² Education policies have tended to stress the importance of upper primary over lower primary in the allocation of the most qualified and experienced teachers.

Even where lower primary teachers are fluent in the spoken language, they often lack confidence

in reading and writing the local language. This is the case even when the local language is their own mother tongue, usually because very few teachers have ever received formal lessons in local languages. The rapid growth in multiple dialects and the borrowing of vocabulary items from other neighbouring languages has contributed to a lack of uniformity in speaking, reading, and writing local languages. This was recognized,²⁴³ and the rapid development of local language training modules in PTCs was a recommendation of the Primary Curriculum Reform Road Map. According to the MOEST, no PTCs currently provide local language re-training courses in 2015. When local languages as LOIs were formalized in 2007, there was a demand from teachers for the rapid creation of basic dictionaries and/or word books in local languages to provide support for local language learning by teachers.

4.6 Financing

Primary schools are provided with an annual capitation grant of US\$2 per student. This hasn't changed for many years. MOEST has proposed to increase this to US\$3, but the proposal has not yet been implemented.

Until the advent of liberalization policies resulting from the USAID-funded SUPER project, which were enshrined in the Kajubi report of 1989 and the Government White Paper of 1992, ministries procured their TLMs centrally.

From 2001–2002, multiple textbooks were approved and were made available to schools via an approved list from which schools selected and ordered what they required up to an annual budget level which was based on primary school enrollments. This modality

²⁴⁰ Read, T., and Hicks, R. (2005). Primary Curriculum Review Report. RNE for the MOEST.

²⁴¹ Effective teaching of literacy in a local language demands that teachers are able to read and write the language with a degree of accuracy and confidence. Evidence collected from the field as part of the 2005 Primary Curriculum Review suggests that for many local languages in Uganda, these basic skills are quite rare. As a result, there is a widespread tendency to assume that the use of the local language in lower primary is for verbal communication only and that the language of literacy remains English.

²⁴² There is no guarantee that lower primary teachers will be proficient even as speakers in the local language used as the LOI. For example, in one school where Kiswahili was being used as the LOI, the two teachers who were most fluent in Kiswahili (with Grade V diplomas and formal language qualifications) were teaching in P6 and P7 where the LOI was English. One of the P1 teachers, with a basic Grade III teaching qualification, was not even a fluent Kiswahili speaker and was obviously struggling with the problems of teaching reading, writing, listening, and speaking in a language with which she was not very familiar. The Deputy Head Teacher thought that her language problems were not significant because she was only teaching P1 students.

²⁴³ Enyutu, S., and Read, T. (Feb 2006). Primary Curriculum Review Road Map. RNE for MOEST.

was scrapped in 2009 because of irregularities, and some publishers have never been paid despite having delivered books in good order and condition. Since then, textbook procurements have been made using a hybrid modality which aimed to combine the strengths of both centralized and decentralized procurement. The salient features of the hybrid approach are:

1. **DDP (Duty Delivery Paid to named school)** – Publishers are required to deliver to each school's doorstep. However, this requirement has been modified recently as a result of a number of challenges raised by the publishers. The current system enables books to be delivered to the district or other designated place(s) mutually agreed by the school(s) and the DEO. However, the publisher must meet the travel and collection expenses of the head teachers to and from the school. The head teacher or representative has to acknowledge receipt of books by signing on the delivery note.
2. **Placement of orders/selection** – The textbooks are now selected by the ministry, as opposed to the previous system where schools were encouraged to select and order the books they required. This was possible because the approved list provided a good choice of approved books from 3–5 prequalified publishers. Today the ministry is compelled to procure materials from the best evaluated bidder (per lot per subject and grade level) due to limited funds allocated for textbook procurement and supply.
3. **Signing of Contract** – This is done centrally between the ministry and the successful suppliers/publishers.
4. **Contract management and supervision** – This is the responsibility of the Commissioner for Basic Education or his/her representative.
5. **Payments** – This is now done centrally; disbursement of funds to districts has now been abandoned. Annual budgets for instructional materials are part of the budget of the Basic Education Department.

The MOEST no longer has budgets for supplementary readers, as was the case in the past when government-aided primary schools were obliged to spend 10% of their UPE capitation grant on reading books. This program was scrapped in 2009. The revised curriculum has a component of reading books in English as well as 27 local languages, but due to limited funds, only local languages with approved orthographies have been brought on board thus far. GPE funding has enabled the MOEST to procure curriculum textbooks and some readers. The budget allocations for textbooks for the last 5 financial years are reported in Figure 5.

Figure 5: MOESTS Textbook budget allocations 2011–2016

FY	Budget (million US\$)
2011/12	5.311
2012/13	5.232
2013/14	4.950
2014/15	5.359
2015/16	4.771

There have been funding challenges for TLM supplies related mainly to rollover contracts, reduced funding levels, and late releases of funds every quarter – all of which have affected the levels of TLM provision to schools.

The information provided above demonstrates, not for the first time, the rapidly changing policy directions that are typical of TLM supply in many SSA countries. The decentralized, school empowerment, liberalized policies sponsored by the USAID-funded SUPER project in the late 1990s that resulted in school-based selection and ordering of the titles required by schools from an approved list of competing textbook series and supplementary materials, which achieved 1/2 textbook student ratios by 2006, have now been abandoned and replaced by a policy of single monopoly textbooks for each subject and grade level, allocated centrally by the state. Section 3 demonstrates the levels of decline in basic textbook availability in schools since the abandonment of the previous policy. The cause of the

decline is considered by MOEST officials and publishers to be a combination of decreased annual TLM financial allocations, the diversion of TLM financing budgets to non-TLM uses (e.g., the Karimoja famine), continued problems with district to school distribution, and ongoing losses resulting from sub-standard school TLM management and conservation including theft and sales to private schools.

4.7 School Management and Usage

In November 2013, the World Bank in association with the African Economic Research Council published: "Education and Health Services in Uganda: Data for Results and Accountability."²⁴⁴ The following extracts from this survey (also summarized in Figure 6) provide an insight into some of the school management issues in Uganda:

- ▶ Only 19% of tested primary teachers could demonstrate even a minimum level of curriculum mastery for the subjects that they were supposed to teach.
- ▶ There were serious differentials in teacher knowledge and competence between districts and most particularly between the northern and rural areas and between Kampala and urban areas.

- ▶ 27% teacher absenteeism was recorded in government primary schools. Of the teachers in school, 30% were not teaching.
- ▶ In 40% of primary government school classrooms, no teaching was taking place.
- ▶ On average P4 students in the Northern Region were receiving 90 fewer contact days per year compared with their counterparts in Kampala.
- ▶ No textbooks or other TLMs were in use by students in 86% of government primary schools.
- ▶ In private primary schools the situation was even worse, with only 3% of students being provided with access to TLMs in class.

Two school visits demonstrated no effective management of TLMs in either primary school, and the low level of TLM school management and conservation was also confirmed by MOEST. Inadequate school storage has also been a major problem in rural primary schools. Management Handbooks and TLM Usage Handbooks have been written and distributed to all schools, but rapid staff turnover through postings and resignations, the high incidence of untrained teachers in lower primary classes, high levels of head teacher and teacher absenteeism, and lack of adequate storage facilities lead to generally poor TLM management, high levels of loss and damage, and the widespread under-use or non-use of the TLMs supplied.

Figure 6: School Statistics, World Bank 2013

	Students/ Textbook	Daily Teaching Hours	Teacher Absenteeism Rate	Teachers w/min Curriculum Knowledge
All Uganda	14	3h 17m	24%	20%
Gov't Schools	12	2h 55m	27%	19%
Private Schools	100	4h 20m	14%	20%
Rural	17	2h 43m	31%	17%
Urban	7	3h 33m	19%	25%

²⁴⁴ Wayne, W., and Martin, H. G. (2013). Education and Health Services in Uganda: Data for Results and Accountability. World Bank and African Economic Research Council.

4.8 Digital Opportunities

There are no obvious opportunities for the widespread introduction of the use of reading support via digital media in government primary schools in the short to medium term, although some private primary schools and elite government primary schools may be in a position to do this on an individual school basis.

5. Discussion and Opportunities for a Global Book Fund

Uganda has an LOI policy supporting the use of local languages from P1–4, followed by immediate transition to English. This “early exit” LOI policy requires the rapid development of English language skills in lower primary grades in preparation for transition to English as the LOI in P4. *Thus, there is a need for reading books in English as well as local languages that a GBF could help to provide.*

At present, 12 local languages are in use, and within the next few years a further 3 or 4 local languages could be added. All of these local languages are underserved, except perhaps for Luganda. Literacy and reading are high MOEST priorities, but MOEST recognizes that it has seriously underfunded literacy and reading provision for at least the past decade. *This gap between MOEST goals and current funding provision may be an opportunity for a GBF to provide materials until such time that the MOEST is willing/able to source the funding.*

Local publishers have the skills, capacity, and experience to find local language primary reading book authors and publish them according to any reasonable decoding and levelling requirements established by a GBF intervention. Additionally, a GBF making larger orders to these publishers would reduce publishers’ risk and capital investment expenses, allowing them to produce reading books at lower costs. In this way, a GBF could make reading books more affordable for future MOEST purchases as well as purchases by parents and private schools. *MOEST and donors should develop a long-term working relationship with local Ugandan publishing houses as*

an investment in the development of permanent and sustainable Ugandan authorship and publishing capacity.

Significant barriers to effective implementation of a GBF intervention exist in Uganda. Local booksellers do not have the capacity to handle national distribution of reading books to all target schools. Even if books could be provided on a large scale, primary school management and use of TLMs and reading books remain very weak on multiple levels. Teacher training in local languages via PTCs has not yet been institutionalized, and this is perceived to seriously weaken the literacy impact of using local languages as LOIs. Additionally, storage for TLMs remains a problem, particularly in rural schools, and this could result in loss and damage of reading books that are provided. *Successful implementation of a GBF intervention would require significant upgrades to the infrastructure and training around the care and use of TLMs and reading books.*

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7. Appendix

7.1 Appendix 1: Interview List

- | | |
|-----|---|
| 1. | Education Development Partners |
| 2. | Education Planning Department Ministry of Education Science Technology and Sports (MOEST) |
| 3. | Instructional Materials Unit (MOEST) |
| 4. | Department of Teacher Education |
| 5. | National Curriculum Development Centre |
| 6. | Chair Uganda Publishers Association |
| 7. | Chair Uganda Booksellers Association |
| 8. | MK Publishers Ltd. |
| 9. | East African Educational Publishers |
| 10. | Netmedia Publishers |
| 11. | Ntinda Pimary School Kampala |
| 12. | Hashya Primary School Butaleja |
| 13. | National Library of Uganda |
| 14. | Ministry of Gender Labor and Social Development. |
| 15. | Global Partnership for Education |

7.2 Appendix 2: Districts Not Covered by Interventions

SHRP, GPE, and Lara Early Grade Reading Interventions

District	Local Language
1. Kapchorwa	Kubsabiny (1)
2. Bukwo	Kupsabiny
3. Kween	Kupsabiny
4. Buliisa	Lugungu (2)
5. Nakasongola	Luluuli / Lunyala (3)
6. Kiryandongo	Luluuli / Chope
7. Kisoro	Rufumbira (4)
8. Busia	Samia (5)
9. Abim	Lebthur (6)
10. Butaleja	Lunyole (7)
11. Ntoroko	Rwamba (8)
12. Tororo	Japadhola (9)
13. Moyo	Madi (10)
14. Adjumani	Madi
15. Koboko	Kakwa / Aringa (11)
16. Yumbe	Kakwa
17. Zombo	Alur / Jonam (12)
18. Nebbi	Alur / Jonam
19. Amudat	Pokot (13)
20. Jinja	Lusoga (14)
21. Kaberamaido	Kumam (15)
22. Kampala	Cosmopolitan

NB: Total number of local languages not covered: 14

For Jinja, though the District is not covered, primary reading materials have been developed, and all the other Lusoga-speaking Districts are covered.

7.3 Appendix 3: Districts Covered by Interventions

SHRP, GPE, and Lara Early Grade Reading Interventions

Program	Districts	Total Number of Districts	Languages	Total Number of Languages
USAID / Uganda School Health and Reading Program (SHRP)	Kumi, Katakwi, Serere, Apac, Lira, Kole, Wakiso, Gomba, Kiruhura, Bushenyi, Kabale, Masindi, Kyenjojo, Kabarole, Gulu, Pader, Kitgum, Arua Mbale, Sironko, Manafwa, Budaka, Pallisa, Kibuku, Nakapiripirit, Napak, Moroto, Kasese, Iganga, Kamuli, Kaabong	31	Luganda, Runyankole/ Rukiga, Ateso, Leblango, Runyoro/ Rutoro, Lebacholi, Lugbarati, Lumasaba, Lugwere,	12
	(Ibanda, Buikwe, Ngora, and Otuke Control Districts)	+ 04	Ngakarimojong, Lukhonzo, Lusoga	
USAID Uganda Literacy Achievement and Retention Activity (LARA)	Kanungu, Rukungiri, Hoima, Sheema, Rubirizi, Mitooma, Buhweju, Mpigi, Sembabule, Butambala, Kyegegwa, Nakaseke, Luwero, Mityana, Kiboga Masaka District, Masaka Municipality, Kalungu, Lwengo, Rakai, Lyantonde, Bukomansimbi, Kalangala, Kayunga, Mukono, Buvuma, Mbarara District, Mbarara Municipality, Ntungamo District, Ntungamo Municipality, Isingiro	28	Luganda, Runyankole/ Rukiga, Runyoro/ Rutoro	03
GPE / Uganda Teacher and School Effectiveness Project (UTSEP)	Amuria, Soroti, Bukedea, Oyam, Alebtong, Amolotar, Dokolo, Mubende, Kyankwanzi Kibaale, Kamwenge, Agago, Lamwo, Amuru, Nwoya, Maracha, Buduuda, Bulambuli, Kotido, Bundibugyo Bugiri, Kaliro, Buyende, Mayuge, Namayingo, Namutumba , Luuka	27	Luganda, Ateso, Leblango, Runyoro/ Rutoro, Lebacholi, Lugbarati, Lumasaba, Ngakarimojong, Lukhonzo, Lusoga	10



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