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# TEXTBOOKS AND LEARNING MATERIALS

GPE Value for Money Guidance Note



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## Acknowledgments

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## ACRONYMS AND ABBREVIATIONS

GPE	Global Partnership for Education
ISO	International Organization for Standardization
VfM	value for money

# THE GPE VALUE FOR MONEY GUIDANCE NOTES

**INVESTING FINANCIAL RESOURCES IN CHOICES TO GET THE BEST RESULTS.** This basic principle underpins the work of the Global Partnership for Education (GPE) on value for money. As a partnership with a strong emphasis on fostering the role of partner countries, one of GPE's roles in improving investment in education is providing guidance for policy makers and other decision makers. These guidance notes provide practical advice on important choices, clear guidance where evidence exists and information about the kinds of consequences stemming from policy choices.

These notes aim to highlight critical, and often overlooked, choices. Whether it is books, classrooms or teachers, choices made today can have long-term consequences. Although all three are linked, GPE is providing notes on these three areas to initiate further discussion and clarity of decision making. Consistent with GPE's goal to improve learning and equity through stronger education systems, each note is a building block toward strong evidence-based education systems.

For each note, utility and selectivity have been guiding principles. Policy makers often can only make a few changes of systemic significance. Each note highlights some key suggestions for change that are, based on GPE's experience and existing evidence, most consequential in enhancing financial choices for greater results. In selecting the areas for guidance, the core value for financial considerations is applied and adopted to GPE's business model: Empowering the local development community and government policy makers to (i) aim for equitable and sustainable education sector plans that (ii) focus on the most effective interventions and (iii) deliver those efficiently by (iv) seeking the lowest cost in procuring necessary inputs.

These notes are intended to support local accountability and oversight. They are written to allow for informed dialogue to take place, evidence to be introduced, and ultimately greater effectiveness, equity and sustainability to be achieved. The notes are conscious of cross-cutting themes, including gender equality, the importance of reaching marginalized groups and the detrimental impact of corruption.

These notes, while attempting to be suitable in their guidance for most country circumstances, do not explicitly cover what value for money means in fragile and conflict-affected situations. There would clearly be a range of additional considerations that may affect the cost of school construction, recruitment, and retention of teachers, or coping with an influx of refugees. The consequences, including financial, for building resilient education systems that are inclusive and adaptive are significant and necessary. However, they do fall outside of the scope of these guidance notes. ◀



# INTRODUCTION TO TEXTBOOKS AND LEARNING MATERIALS

This overview summarizes the current knowledge concerning the provision of books to schools, from the planning stage through the publication and distribution processes. It separates the well known from the less well known or less frequently practiced. It lays the foundation for critical interventions that can help stretch government and donor resources further. These interventions, which are at the core of this guidance note, are discussed in more depth in the section “Making Better Choices.”

This guidance note has been informed by policy notes and other guidance provided by the international donor community—notably, the United Nations Educational, Scientific and Cultural Organization (UNESCO), the World Bank, and the U.K Department for International Development (DFID)—as well as other agencies, including private philanthropy.<sup>1</sup>

This guidance note is relevant to books used as learning materials generally; however, much of the discussion refers specifically to textbooks. This is because in developing countries, textbooks are the principal learning materials used, and they are a major financial investment. This note focuses on the specific choices that can have the most significant consequences, based on the available literature. Since there are significant variations in the textbook experience across countries, it focuses on those areas where there is broad-based evidence to support decision making.

**THE TEXTBOOK IS AN IMPORTANT TOOL FOR LEARNING.** Over the years, education evaluation studies have noted the positive impacts of textbooks on student achievement in developing countries, with impacts greater among poor and underprivileged children.<sup>2</sup> In schools where the official curriculum is not widely promoted, the textbook effectively becomes the curriculum, providing teachers with the material needed for daily instruction.

**TEXTBOOKS ARE ALSO COST-EFFECTIVE.** Studies of education and of education efficiency in developing countries confirm value for money in textbook investment.<sup>3</sup> In one country, the national textbook program increased the education budget by 1 percent but also raised the average achievement of early grade school children by 14 percent. Donors continue to provide

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- 1 UNESCO, “Every Child Should Have a Textbook” (Policy Paper 23, UNESCO, Paris, 2016); World Bank, *Operational Guidelines for Textbooks & Reading Materials* (Washington, DC: World Bank, 2002); DFID, “Guidance Note: Learning and Teaching Materials: Policy and Practice for Provision” (A DFID Practice Paper, DFID, n.d.). International, regional and technical studies have also been provided by other development partners—for a global book fund, see Results for Development Institute, *Global Book Fund Feasibility Study: Final Report (April 2016) to USAID, Norad, DFID, GRN* (Washington, DC: Results for Development Institute, 2016); for textbooks in Asia, see Andy Smart and Shanti Jagannathan, *Textbook Policies in Asia: Development, Publishing, Printing, Distribution, and Future Implications* (Manila: Asian Development Bank, 2018); for textbooks in Africa, see Birger Fredriksen, Sukhdeep Brar, and Michael Trucano, *Getting Textbooks to Every Child in Sub-Saharan Africa: Strategies for Addressing the High Cost and Low Availability Problem* (Washington, DC: World Bank 2015), and Tony Read, *Where Have All the Textbooks Gone? Toward Sustainable Provision of Teaching and Learning Materials in Sub-Saharan Africa* (Washington, DC: World Bank, 2015); on textbook development, see Richard A. B. Crabbe, Mary Nyangi, and Helen Abadzi, *Textbook Development in Low Income Countries: A Guide for Policy and Practice* (Washington, DC: World Bank, 2014); for supplementary reading materials, see blueTree Group, *Best Practices for Developing Supplementary Reading Materials* (final report produced for the U.S. Agency for International Development by blueTree Group, representing JBS International, Inc., 2014); and for storybooks, see Neil Butcher, Lisbeth Levey, and Kristy von Gogh, *Good Stories Don't Grow on Trees: A Guide to Effective Costing of Storybooks in the Global South* (Early Literacy Resource Network, 2019).
  - 2 A meta-analysis of 79 high quality education and economic studies published between 1990 and 2010 noted that textbooks had the greatest number of studies reporting positive impacts on learning achievement and time in school; see Paul Glewwe et al., “School Resources and Educational Outcomes in Developing Countries: A Review of the Literature from 1990 to 2010” (NBER Working Paper 17554, National Bureau of Economic Research, Cambridge, MA, 2011), 19, 41–43, 51, 57–58. Earlier positive relationship between access to reading materials in school and pupil achievement had been noted in Brazil, Chile, Ecuador, El Salvador, Ghana, India, Iran, Malaysia, Thailand, and Uganda (see Stephen P. Heyneman, Joseph P. Farrell, and Manuel A. Sepulveda-Stuardo, “Textbooks and Achievement: What We Know” (World Bank Staff Working Paper 298, World Bank, Washington, DC, 1978), 2–3; and the stronger impact of textbooks on disadvantaged pupils in the Philippines (see Stephen P. Heyneman Dean T. Jamison, and Xenia Montenegro, “Textbooks in the Philippines: Evaluation of the Pedagogical Impact of a Nationwide Investment,” *Educational Evaluation and Policy Analysis* 6, no. 2 [1984]: 147). See also evaluation studies cited in note 7, below.
  - 3 The textbook, with teacher training, was observed to be most cost-effective in Kenya; see B. Piper et al., “Identifying the Essential Ingredients to Literacy and Numeracy Improvement: Teacher Professional Development and Coaching, Student Textbooks, and Structured Teachers’ Guides.” *World Development* 106 (2018): 324. The cost-effectiveness of textbooks was noted in a comparative study of education in Sub-Saharan Africa (see Kristen Majgaard and Alain Mingat, *Education in Sub-Saharan Africa: 2012. A Comparative Analysis* [Washington, DC: World Bank, 2012], 132–33), confirming earlier inferences (see Katharina Michaelowa and Annika Wechtler, “The Cost-Effectiveness of Inputs in Primary Education: Insights from the Literature and Recent Student Surveys for Sub-Saharan Africa” [working document prepared for the ADEA Biennial Meeting, Libreville, Gabon, March 27–31], 15, 17) and similar findings in Brazil, Nicaragua, Thailand (see Marlaine E. Lockheed and Eric Hanushek, “Improving the Efficiency of Education in Developing Countries: Review of the Evidence” [Education and Training Series Discussion Paper EDT77, World Bank, Washington, DC, 1987], 21), and the Philippines (see François Orivel, “Cost Analysis of the Philippines Textbook Project: Report Made at the Request of Unesco” [Dijon University, 1979], 28).

technical and financial support to governments and nongovernmental organizations for the provision of textbooks. According to GPE, by the end of fiscal year (FY) 2018, of the 34 active grants provided to 34 countries and states, 26 grants (76 percent) included support for curriculum and learning materials, or 20 percent of total grant value for FY2016–FY2018; the support accounted for the purchase and distribution of 84 million textbooks.<sup>4</sup>

**VALUE FOR MONEY MEANS MAKING GOOD CHOICES TO CONVERT FINANCIAL INPUTS TO LEARNING OUTCOMES.**

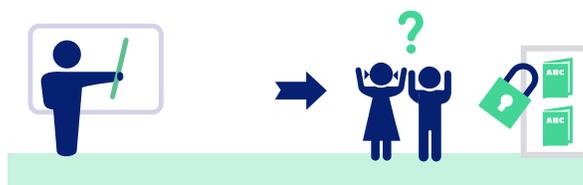
This guidance note has used a systematic approach to identify the most frequently neglected choices, which are also often the most consequential ones. Inputs to generate activities should be characterized by economy; activities to produce outputs should be conducted with efficiency; outputs to achieve desired outcomes should be effective; and outcomes to favorably impact higher-level goals should contribute toward their sustainability.<sup>5</sup>

**THE PROVISION OF TEXTBOOKS IS A MULTISTEP PROCESS, NOT A SINGLE EVENT.** The processes of planning and curriculum development precede the provision of books. The provision process itself includes the writing, publishing, manufacturing, and delivery and distribution of books. The processes of teacher training and evaluation follow the provision of books (Table 1).<sup>6</sup>

**PLANNING AND CURRICULUM WORK ARE ROUTINELY CARRIED OUT; TEACHER TRAINING AND EVALUATION ARE NOT.** Teachers who are trained to use new materials in the classroom tend to use those learning materials. When teachers are not trained in the use of textbooks, or when they do not consider them to be helpful, books gather dust. Textbook programs should therefore be evaluated for their impact on learning outcomes, and the evidence gathered should be used to inform policy and programs for maximum effect.<sup>7</sup>



A small increase in textbook funding can yield a significant increase in student achievement.



Training on textbooks encourages teachers to use textbooks in classroom instruction.

4 GPE grant data are from a costing exercise by thematic area (Rudraksh Mitra, e-mail message to author, September 18, 2019); textbook quantities are from indicator 21 of the data set “Partner Country Data on GPE Results Framework for 2015–2018,” Global Partnership for Education, Washington, DC, <https://www.globalpartnership.org/content/partner-country-data-gpe-results-framework-2015-2018>.

5 The full framework is described in GPE’s conceptual framework; see GPE, “Value for Money (VfM): Conceptual Framework for the Global Partnership for Education” (discussion draft, GPE, Washington, DC, 2019).

6 This process cycle is used for this guidance note only. It is not intended to be a universal definition of the publication or provision of textbooks.

7 Research findings on the positive impacts of textbooks on student achievement are cited in Valerie E. Lee and Tia Linda Zuze, “School Resources and Academic Performance in Sub-Saharan Africa,” *Comparative Education Review* 55, no. 3 (2011): 369–97. However, another study summarizes reports of little or no learning gains from textbooks, for a variety of reasons, notably that the textbook content was too hard for students, the textbooks were kept from them; see Lant Pritchett, “Creating Education Systems Coherent for Learning Outcomes: Making the Transition From Schooling to Learning” (Working Paper RISE-WP-15/005, Research on Improving Systems of Education, Oxford, U.K., 2015), 37. These factors point to the need to address gaps in curriculum or authorship or teacher training that prevent learning from books.

**TABLE 1. THE TEXTBOOK PROVISION CYCLE: FROM EDUCATION SECTOR PLAN TO EVALUATION OF IMPACT**

	<b>PLANNING, CURRICULUM DEVELOPMENT</b>	<ul style="list-style-type: none"> <li>• Quality goal in education sector plan, book policies</li> <li>• Review of student test performance, teachers' assessments</li> <li>• Curriculum review and revision</li> <li>• Data update: enrollment, available books in local stores, schools</li> </ul>
	<b>WRITING OF CONTENT</b>	<ul style="list-style-type: none"> <li>• Charting of scope and sequence of units and lessons</li> <li>• Writing of content of student book, teacher guide</li> <li>• Testing of materials in classrooms</li> <li>• Revision of content, approval of manuscript for publishing</li> </ul>
	<b>PUBLISHING</b>	<ul style="list-style-type: none"> <li>• Editing of authors' manuscript</li> <li>• Book design, typesetting, illustration, page layout</li> <li>• Technical specifications, evaluation process, order quantities</li> <li>• Proofreading, correction, inspection, approval for printing</li> </ul>
	<b>PROCUREMENT*</b>	<ul style="list-style-type: none"> <li>• Solicitation of offers for manufacturing and distribution</li> <li>• Evaluation of quality, price</li> <li>• Contracting</li> <li>• Inspections, payments</li> </ul>
	<b>MANUFACTURING</b>	<ul style="list-style-type: none"> <li>• Paper procurement (by contractor)</li> <li>• Printing, binding, packaging</li> <li>• Shipping, overland transportation to contracted locations</li> </ul>
	<b>DISTRIBUTION</b>	<ul style="list-style-type: none"> <li>• Warehousing</li> <li>• Marketing, sales promotion</li> <li>• Delivery to regions, local offices, bookstores</li> <li>• Distribution to or pickup by schools</li> </ul>
	<b>TEACHER TRAINING, EVALUATION</b>	<ul style="list-style-type: none"> <li>• Orientation of teachers on new materials</li> <li>• Assessments of program effectiveness or impact on learning</li> <li>• Feedback of findings to planning, curriculum development</li> </ul>

\* Procurement is not a separate link in the book chain but an important process, as purchasing of goods and services is carried out at every link, most significantly in manufacturing and distribution.

Value for money calls for processes to be linked sequentially and firmly, from planning through evaluation, for the provision to be economical and efficient, each process delivering effective outcomes, and the entire chain contributing to achieving and maintaining quality and equity in education (Table 2). Within processes, there are large areas where achieving higher value for money can be improved, or where important choices need to be considered. These include:



**Economy.** In providing the funds (inputs) for procurement and distribution (activities), fraud and corruption can jeopardize the government’s goal of achieving economy in the provision of textbooks and other learning materials to schools. What can be done to curb corruption, especially in the procurement process, or to eliminate fraud in the publishing and distribution processes? (For example, the use of noncompliant materials in book manufacturing, short deliveries or payment of “ghost” book purchases and deliveries?) How can the government obtain good quality books at the right price?



**Efficiency.** At every step of the process, costs are involved. But does the government know how much a textbook really costs? Are the government’s own costs accounted for, in addition to the cost of purchasing or printing books? Are there less expensive alternatives that would be more efficient? For example, can the government obtain better quality by contracting out curriculum research rather than conducting the research itself? The same question can be asked regarding content development and publishing, prepublication field testing and tryouts, training teachers on textbook use, and the evaluation of programs’ impact on learning.



**Effectiveness.** In making textbooks and learning materials (outputs) available in schools, the government seeks to improve teaching and raise learning outcomes. The achievement of this purpose requires careful guidance, to direct many actors to play their specialized roles in this complex process. What policies should be adopted, and what should parents and private industry be told about what the government will or will not do with regard to textbook provision? Can publishers contract teachers to be the authors of textbooks or storybooks for their students? Should the government prescribe one textbook for all schools in the country, or should schools be allowed to choose their textbooks? Should the government give preference to locally produced materials, to help develop the nation’s publishing and printing industry?



**Sustainability.** Improved teaching and learning outcomes must be maintained to achieve a social good such as universal access to education, or the improved delivery of quality education as a public service (impacts). Thus, the provision of materials needed for learning must also be maintained. Textbooks used by children in class become worn out (some are lost) over some years and must be replaced. Because this replenishment of books is a regular, annual activity, what institutional arrangements must be made to ensure the sustainability of the system for procuring them, and for revising and issuing new editions when curriculum improvements are made? How can operating procedures be improved, standardized and maintained as part of institutional memory?



**Equity.** How do the government and citizens know that the system for providing schools with books not only is efficient and economical but also promotes equity in education? How can the evaluation process establish benchmarks for program improvement, and/or the impact of textbooks on student learning, and the achievement of more equitable educational services?

**This guidance note focuses on four specific areas:**

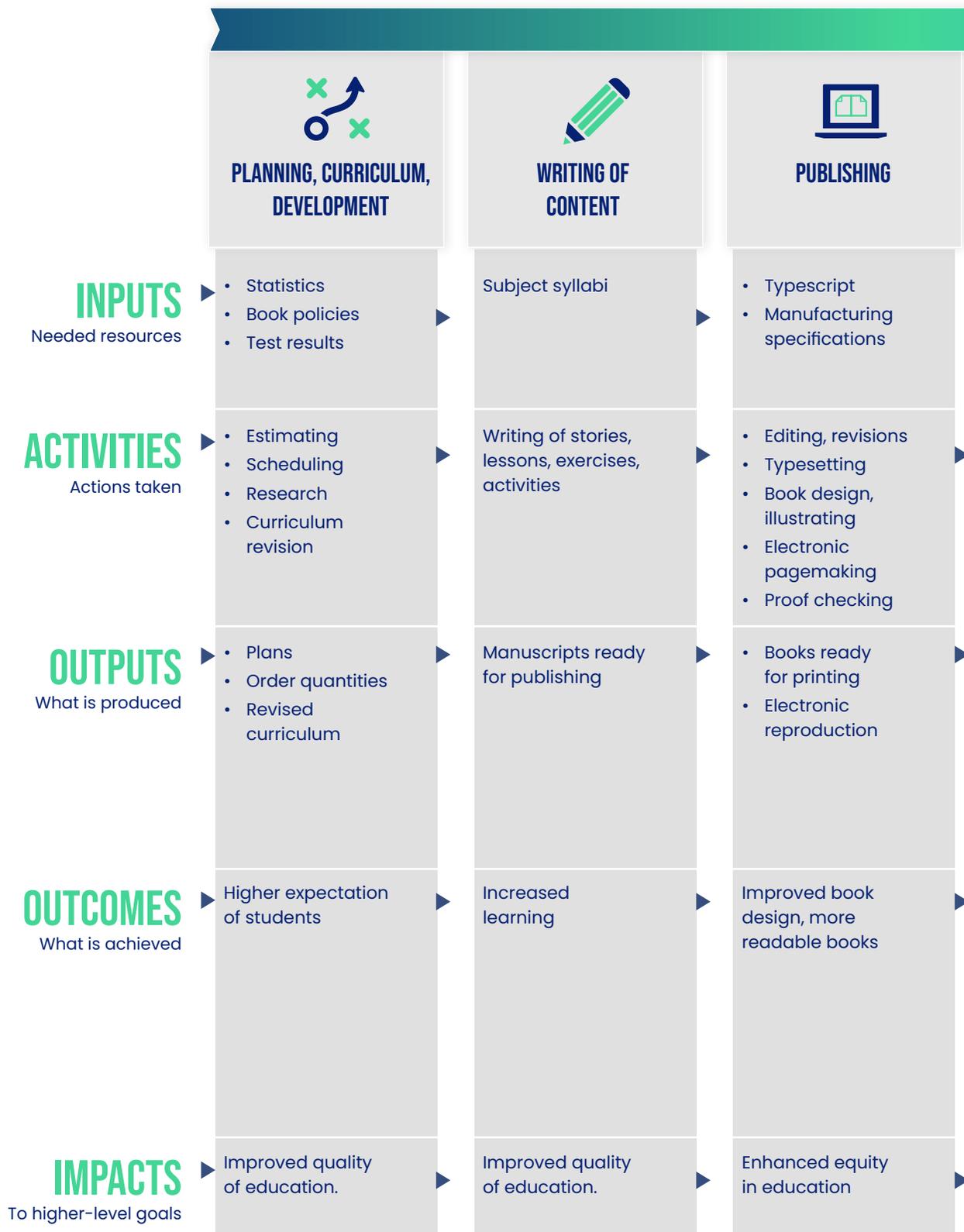
**(i)** The costing and tracking of the costs of the publication and distribution of books, and the related processes, for greater economy;

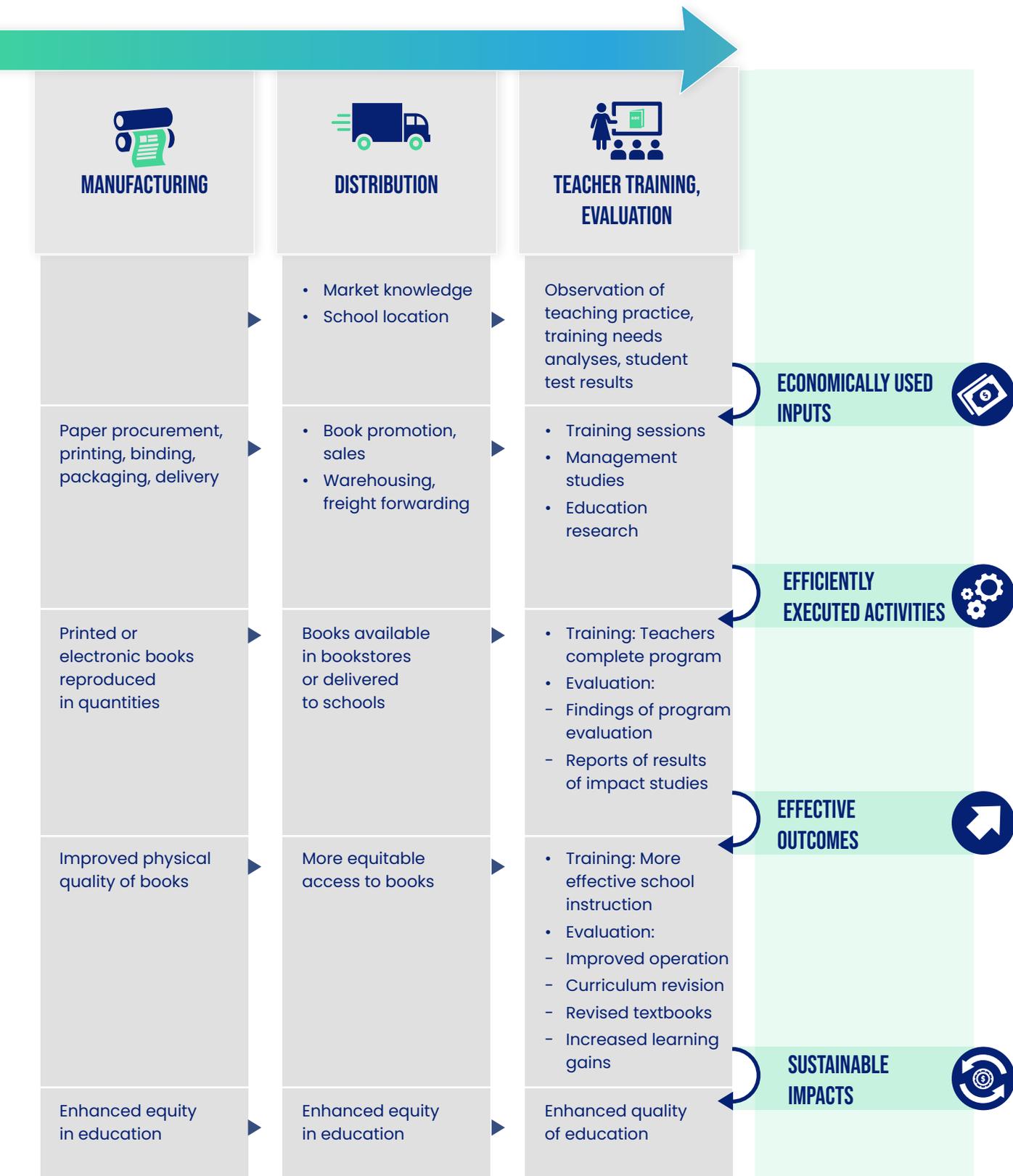
**(ii)** developing institutions to sustain the provision of books;

**(iii)** fighting fraud and corruption in the provision of books to schools; and

**(iv)** integrating textbook policies into education sector plans, with the aim of achieving more equitable educational outcomes.

TABLE 2. THE BOOK CHAIN: VALUE FOR MONEY FROM INPUTS TO IMPACT





# MAKING BETTER CHOICES

The following discussion covers four areas in the provision of textbooks and learning materials in which choices for the government are sometimes difficult to make. These areas have been chosen for their importance—to acknowledge what is known, and to focus on weaknesses that can be strengthened with the help of local country partners.



## ECONOMY: THE RIGHT QUANTITIES AT THE RIGHT PRICE

In the provision of textbooks, the principal economic choices are (i) adoption of a single textbook, or of several different textbooks, and (ii) whether the services involved would be better done by the government, or by the private sector.

### SHOULD THERE BE ONE TEXTBOOK FOR ALL, OR SEVERAL TO CHOOSE FROM?

There are two fundamental choices for providing textbooks to schools. With **single book adoption**, one textbook per subject, per grade is approved for use in all schools; with **multiple book adoption**, several different textbooks are approved for each subject and grade, and local authorities or schools select the textbooks they will use from a list of approved textbooks. Table 3 outlines the strengths and weaknesses of each choice.

**SINGLE BOOK ADOPTION YIELDS LOW UNIT COSTS.** In this approach, the process is shared with private industry. The government develops the curriculum and, through a competitive procurement process, contracts the writing, publishing, printing and distribution of the winning textbook. Less frequently carried out, though important, are the training of teachers on the use of the new materials and the evaluation of the effectiveness of the book (that is, the impact of the books on student learning). The costs incurred in single book adoption are low because only one book is ordered, and in great quantities; this significantly lowers the unit cost of printing. Distribution, if separately contracted, is an additional cost that is not always imputed to the total cost of the book.

**MULTIPLE BOOK ADOPTION ALLOWS GREATER CHOICE.** In this approach, central government evaluates textbooks offered by publishers, selects those that meet its evaluation criteria and issues a list of books officially approved for use in the schools. Listed publishers market the books to local governments and schools, which select the textbooks that best meet their instructional needs and buy the books, usually using government-provided funds. Parents also buy books on the open market. The cost of books in this approach tends to be higher since the orders are divided among several publishers, and the resulting low-quantity orders for each publisher preclude economies of scale.<sup>8</sup>

8 Low-quantity printing results in high unit cost, which impacts the publisher's profitability (see Box 1 in "Guidance: Economy," below).

TABLE 3. SINGLE AND MULTIPLE BOOK ADOPTION

	 <b>SINGLE BOOK ADOPTION</b>	 <b>MULTIPLE BOOK ADOPTION</b>
<b>QUALITY OF CONTENT AND DESIGN</b>	 <b>High</b> , if book is selected through a competitive process; doubtful without such a process or, if government-developed, without independent review	 <b>Uneven</b> . Government often approves several books that meet minimum standards (a floor) rather than the best books (a ceiling)
<b>ECONOMY OF SCALE</b>	 <b>High</b> . Adopting only one book for use in all schools means printing in great quantities, reducing the unit cost of the book	 <b>Low</b> . Schools choosing several books fragment the market, resulting in lower print quantities for publishers and consequently higher unit costs of all government-approved books
<b>SENSITIVITY TO LEARNING NEEDS</b>	 <b>Low</b> . One book can address many but not all linguistic and learning differences of students in all schools	 <b>High</b> . With several books available, teachers and school leaders can select the ones most appropriate for the learning abilities and needs of their students
<b>SUITABILITY</b>	 Best for <b>low population</b> , and monolingual school systems	 Best for <b>large, multilingual school systems</b> in sizable urban areas with access to bookstores
<b>COMPETITION</b>	 <b>High</b> stakes for suppliers: in publishing only one book for all schools, or for printing of one book in large quantities	 <b>High</b> at central level, for publishers' books to be included in government-approved list  <b>High</b> at local levels, where publishers and booksellers market to schools, parents and the public
<b>GOVERNANCE RISKS</b>	 <b>Collusion</b> among publishers or printers; bribery of central government officials; fraudulent payments for "ghost" deliveries	 Schools purchasing textbooks not on approved list; accepting " <b>kickbacks</b> " for purchasing one publisher's books over others; pocketing publishers' discounts for quantity purchases using government funds
<b>SUSTAINABILITY</b>	 <b>Possible</b> , if government (i) provides funds for books regularly; and (ii) develops the institutional capacity to manage the provision system	 <b>Possible</b> , if government (i) provides funds for books regularly; and (ii) encourages private publishers to sell books to parents, to share the financial burden of the provision of books with the government

Source: Adapted and expanded from Richard A. B. Crabbe et al., *Textbook Development in Low Income Countries: A Guide for Policy and Practice* (Washington, DC: The World Bank, 2014), 78.

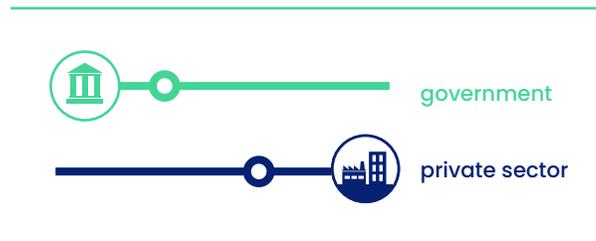
**BOTH APPROACHES HAVE RISKS.** In single book adoption, the low unit cost is the main benefit to the government. But corruption at the level of the central government is a significant risk, in the form of collusion among bidders and government officials, bribery to alter bid evaluations, or authorization to pay nonexistent book deliveries. These risks are covered in more depth in “Curbing Corruption: Improving Economy and Efficiency.”

Multiple book adoption benefits private industry, since the market is shared by several publishers. It also benefits schools: Teachers and school leaders can select the textbooks most appropriate for the varying learning needs of their students, enhancing equity in the provision of education for all. The profitable trade in school textbooks also provides resources for investment in other publications: supplementary materials, fiction for young readers, and trade books (poetry, cooking, personal and home improvement) for the reading public.

However, allowing choice in purchasing provides many opportunities for the misuse of government funds at multiple levels: illegal payments, kickbacks on buying overpriced books, the purchase of books not on the official list and the pocketing of publishers’ or booksellers’ rebates or discounts, among others.

## SHOULD IT BE DONE BY GOVERNMENT OR THE PRIVATE SECTOR?

In the private sector, publishing refers to the *industrial* process, from the authorship to the delivery of books. In this guidance note, a wider concept is adopted, which includes not only the publishing process but also the planning and curriculum development that come prior to the writing of content, as part of the *educational process*, and the teacher training and evaluation that come after books are distributed.



**WHO DOES WHAT IS NOT ALWAYS CLEAR.** In some early book provision systems, the entire process was handled by the government alone. Recent systems have taken a more mixed approach: Government carries out the planning, curriculum development and teacher training, while either government or industry carries out such phases as the writing of content and evaluation, and usually industry alone carries out such phases as publishing and manufacturing. Table 4 compares the capacities of each sector.

**CAPACITY CAN INDICATE THE FITNESS FOR SINGLE OR MULTIPLE BOOK ADOPTION.** Capacity in the industry is high when publication activity is high. Authors, editors and artists recruited by publishers can create textbooks and teacher guides, supplementary readers, fiction and nonfiction, and other trade publications; printing presses can run at or near capacity; and booksellers can deliver books to schools and other institutional buyers and sell books to the general public. When industry shoulders the burden, the government can focus on educational mandates: planning the systematic provision of textbooks and learning materials; setting standards for the selection of textbooks; choosing books that meet those standards; and evaluating the effects of books on student performance. Under these conditions, multiple book adoption is viable.

**TABLE 4. GOVERNMENT AND PRIVATE SECTOR CAPACITIES IN BOOK PROVISION**

ITEM	MINISTRY OF EDUCATION	PUBLISHING INDUSTRY
<b>FINANCING</b> 	Regular government budgetary appropriations  Loans, grants, budget support from bilateral and international development and philanthropic agencies	Private investments, bank loans, revenues from sales, fees
<b>USE OF FUNDS</b> 	Restricted. Funds used only for official activities in approved budget, subject to audit; officials held accountable for misuse of public funds	Flexible. Funds used according to business plan; managers accountable for results (e.g., reaching revenue targets)
<b>PERSONNEL</b> 	Political appointees at highest levels, civil servants at operational and administrative levels; contractors for projects (specialist researchers, experienced teachers); bureaucrats, clerks, laborers at central and local levels	Market-oriented business managers; skilled writers, editors, artists; experienced printing-binding tradesmen and freight forwarders; motivated sales and promotion representatives, entrepreneurial booksellers
<b>ORGANIZATIONAL CULTURE</b> 	Government performs public service Ministries obey laws, rules, and regulations, take actions following established procedures  Few incentives for initiative; risk-taking neither encouraged nor rewarded  No overtime pay; public service may not be available on public holidays	Private industry works for profit  Publishers and printers look for and seize businesses opportunities, modify operations to cut costs, increase sales  Risk-taking encouraged, rewarded when successful  Will pay overtime even on holidays, to deliver on time and claim full payment
<b>FACILITIES AND EQUIPMENT</b> 	Capital investment in buildings and technology lower in priority; personnel salaries and operational budget higher in priority	Workplace efficiency and electronic technology continually updated to keep publishing, printing, distribution, bookselling competitive in the market

When industry capacity is low, the burden weighs more heavily on the government. However, inflexible regulations, shortages of funds, lack of qualified personnel and outdated facilities and equipment can make publication very challenging for the government. Under these conditions, the option for the government is usually single book adoption. The government can constitute teams of public servants to write the textbooks, which can then be tendered for the publishing and printing part of the process, or the government can call for the competitive selection of textbooks for development and production by a nascent local industry or by established international publishers. When selecting a single book, however, it is important to be clear about the importance of the elements of content, design and printing set out below.



## GUIDANCE

**MANAGE THE KEY COST DRIVERS.** In both single and multiple adoption, the cost of a textbook is driven by the book's physical attributes. The basic technical specifications that impact book cost are briefly described below:

- **Paper:** Groundwood or mechanical paper (e.g., newsprint) is the least expensive, but book life using this paper will be limited (1–2 years). Part mechanical paper or wood-free book paper is more expensive, but book life is longer (3–5 years). The basic specifications for paper are weight or grammage; opacity; and brightness.
- **Format (length and width):** The greatest number of pages with the maximum area per page can be calculated on a standard sheet of paper. For example, in the ISO International Paper Size Standard A Series, one A0 sheet (841 x 1189 millimeters [mm]) will yield 32 pages of A4 dimensions (210 x 297 mm), which is the most common size for a textbook page.
- **Number of pages (also extent):** An economical book is one with pages in multiples of 8, 16, 32, or 64—the maximum numbers of pages that can be accommodated on commercial cuts of sheet printing paper.
- **Printing process:** Sheet-fed letterpress or offset presses are economical for small or moderate order quantities (e.g., teacher guides, upper secondary textbooks). Roll-fed offset or gravure presses are more economical for large order quantities (e.g., annually reprinted workbooks, primary textbooks).
- **Color:** A costly feature in low-quantity editions; should be used more to clarify content, less to prettify page.
- **Number of copies:** The higher the quantity ordered, the lower the unit cost. (This is due to the cost of starting up: When machine, ink and paper waste is spread over a substantial number of copies printed, the unit price is lower). Print quantities are usually expressed in units of 1,000 copies.
- **Bookbinding:** Thread sewing is sturdy but also slow and thus costly; some less expensive but still sturdy binding methods are wire stitching (saddle stapling on the spine of thinner books, stitching near the spine on thicker books) and perfect binding (gluing the cover onto the book's spine).

**COUNT ALL COSTS, NOT JUST PRINTING.** A textbook is either bought from a publisher or, when the government has the license to the copyright, simply printed. The cost of a **purchased book** is the purchase price plus the expense incurred in delivering the book to the school; the cost of a **printed book** is the printing plus the fee paid to the copyright owner (the author or publisher), plus the expense incurred in delivering the books to the schools. **Note that the printing cost of a book is different from the publisher’s pricing for the same book. Therefore, the cost of a textbook wholly owned by the government should be carefully calculated:** (i) If the writing of a manuscript is commissioned (i.e., contracted) by the government, the fees paid to the commissioned writers should be added the cost of the book. (ii) If the writing is done by ministry staff, the estimated portion of their salaries that corresponds to the amount of time they spent on the book should be added to the cost of the book. (iii) If publishing services (editing, design, typesetting, art, proofreading, and so on) are also contracted, the payments made on the contracts should be added to the cost of the book. All these costs, which occur prior to the printing of the book, should be added to the cost of printing and distribution to arrive at the total cost of the book. When all of the government’s obligations are added up, the sum can be compared with the total price offered by a publisher for a finished textbook of the same quality and delivered to the school to see which alternative is cheaper, and which is better with regard to time and trouble.

**REMEMBER: PRINTING IS NOT PUBLISHING.** When the ministry orders a book to be printed, the cost of printing the book is the amount charged by the printer. But if the book is protected by copyright, the government must first secure a license from the copyright owner (the author or publisher), who may charge a fee for reprinting the book. **The printing, copyright fee, and distribution costs make up the total cost of the book.** The printing cost of a book is different from the publisher’s pricing for the same book. Comparing the government’s cost for **printing** a book, described in the preceding paragraph, with a publisher’s **selling price** for the same book, or a similar book, results in the erroneous assumption that the latter is costlier.

Printing is the main cost driver of the publisher’s selling price. A high printing cost makes it difficult for a publisher to operate profitably; conversely, a low printing cost allows the publisher to cover all costs and make a profit even while maintaining a competitive price in the market (see Table 5).

**TABLE 5. PRINTING COST AND PUBLISHER’S PROFITABILITY**

ITEM	HIGH UNIT COST (US\$)		LOW UNIT COST (US\$)	
Unit cost of printing	0.50	33%	0.25	17%
Discount to wholesaler	0.45	30%	0.45	30%
Discount to retailer	0.30	20%	0.30	20%
Royalty to author	0.08	5%	0.08	5%
Gross revenue*	0.17	12%	0.42	28%
List (retail) selling price	1.50	100%	1.50	100%

Source: Adapted from Results for Development Institute, *Global Book Fund Feasibility Study: Final Report* (April 2016) to USAID, Norad, DFID, GRN (Washington, DC: Results for Development Institute, 2016), 251.

\*From gross revenue, publisher covers publishing services (design, illustrating, editing, etc.), marketing, administration, cost of borrowings and unsold inventories, taxes—and profit.

**ACHIEVE VALUE FOR MONEY; HELP DEVELOP LOCAL INDUSTRY.** The government's priority policy must be clear: Provide the best quality books at the most economical price, or support the local publishing and printing industry, which may be costly. There will be special-interest and political pressure to prefer local suppliers of publishing and printing, to benefit the national industry. To achieve value for money in the provision of educational materials and also be responsive to the need to foster the development of local industry, procurement arrangements must be planned carefully. Items that local industry can satisfactorily deliver at competitive prices can be packaged separately from items that international suppliers can deliver at more economical prices. For example, low-quantity orders for readers and teacher guides designed in single or only solid colors are usually better suited to the capacity of national commercial printers, as their equipment must also economically fill various other, mostly short-run printing orders of the local commercial community; in contrast, orders for multicolor textbooks in millions of copies can be produced quickly and economically by international industrial printers with equipment configured specifically for high-volume book printing. Providing opportunities to be profitable can incentivize national firms to upgrade their capacity to compete regionally and internationally.

**LOOK FIRST BEFORE LEAPING INTO E-TECHNOLOGIES.** In recent years, experience with new and fast-developing information and communication technology has identified educational and industrial challenges to the technology's application in teaching and learning. The educational challenges include curriculum modifications, availability of accessible digital content, teacher training and student motivation. The industrial challenges are many: intellectual property rights, equipment durability and maintenance, power and connectivity, and affordability to governments and families. Evaluations of impact on student learning and cost-effectiveness are scarce and so far inconclusive.<sup>9</sup> With value for money not yet established for this potentially powerful learning tool, present policy advice must be, in a word, caution.

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9 Discussed in Read, *Where Have All the Textbooks Gone?*, 189–205. See also Fredriksen, Brar, and Trucano, *Getting Textbooks to Every Child in Sub-Saharan Africa*, 85–100.

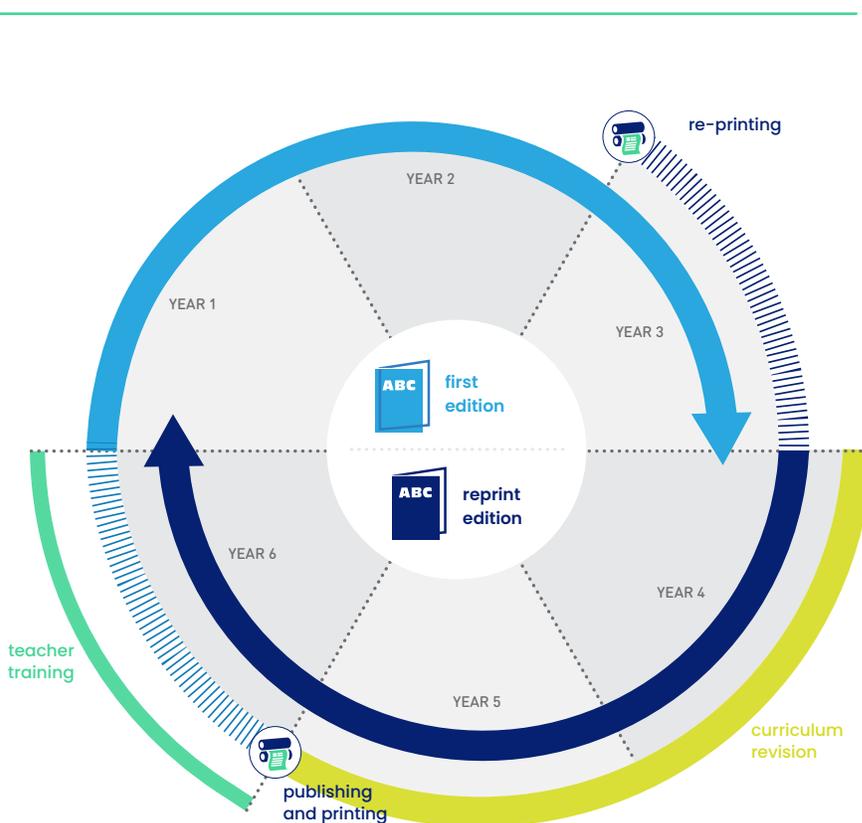
# EFFICIENCY AND EFFECTIVENESS: THE RIGHT BOOKS AT THE RIGHT TIME AND PLACE

**EFFICIENCY** means timely availability of textbooks. This results from a good curriculum planning, writing, production and delivery process, and is best achieved by managing the overall process by one individual, team or institution.

**EFFECTIVENESS** means the textbook is useful because it is actually in the hands of students, and that it is attractive, readable and relevant to the day’s learning objectives.

Books for classroom instruction, especially textbooks, are delivered to schools, used every day and withdrawn when they are no longer usable, after years of wear and tear. The central government, local governments or schools then replace the worn-out copies, order more copies to meet current enrollment needs or wholly resupply all the schools when the curriculum changes. It is a multistage process, and at each stage, the government is presented with choices that must be made.

To maintain adequate numbers of books for use in schools, the multiyear cycles of printing and reprinting must be coordinated (see diagram showing interphases). At each cycle, the processes of curriculum review and development, writing or revision of instructional content, book publishing, printing, distribution, and teacher training and evaluation are carried out in sequence, as shown in Table 6.



# THE CHOICES AT EACH STAGE OF PUBLICATION

Government procurement is carried out in almost all phases of the provision of textbooks and other learning materials to schools, from the writing of manuscripts through the evaluation of educational impact. The government's options at each stage are described below and summarized in Table 6.

## 1 PLANNING AND CURRICULUM DEVELOPMENT.

One key question is how detailed planning should be. Ideally, the goal for providing textbooks and learning materials to schools is set at the highest level, in the education sector plan, as part of quality improvement. The goal should be linked to the annual work and financial plan that sets the year's targets, further detailed in quarterly implementation activities, and closely coordinated with procurement schedules.

**2 CURRICULUM REVISION.** The school curriculum, syllabus or program of study standardizes instruction within the school system. However, a curriculum that is unexamined for long periods of time can lag behind changing educational needs. Ideally, curriculum review and development should be regularly conducted and informed by analyses of student performance in examinations as well as feedback from academic supervisors who have observed teacher performance and student behavior in the field. Furthermore, the number of school years that a curriculum remains in use unchanged should be prescribed. Overly frequent curriculum changes, even to only parts of the curriculum, are both disruptive and expensive because they require replacing textbooks and additional teacher training.

**3 WRITING OF CONTENT.** Is the government the best author of textbooks? Textbook manuscript development means creating content that delivers the curriculum in the language and at the reading level of students. In some ministries of education, this work is done in-house and is assigned to subject matter curriculum writers, or it is contracted out to individuals or organizations

elsewhere in the government or in the private sector. Keeping the writing in-house gives the government total control over the creation of content and the editorial process. However, while curriculum specialists are trained in teaching, research and pedagogy, few are skilled in writing for children. This is a creative talent that thrives in the private sector. Contracting with individuals, including freelance writers, retired teachers and supervisors, and commissioning writing to publishing houses are both feasible options. With their access to experienced writers, publishers know how to work with authors, manage the writing process and interact productively with a ministry's content reviewers and others involved in the development process.

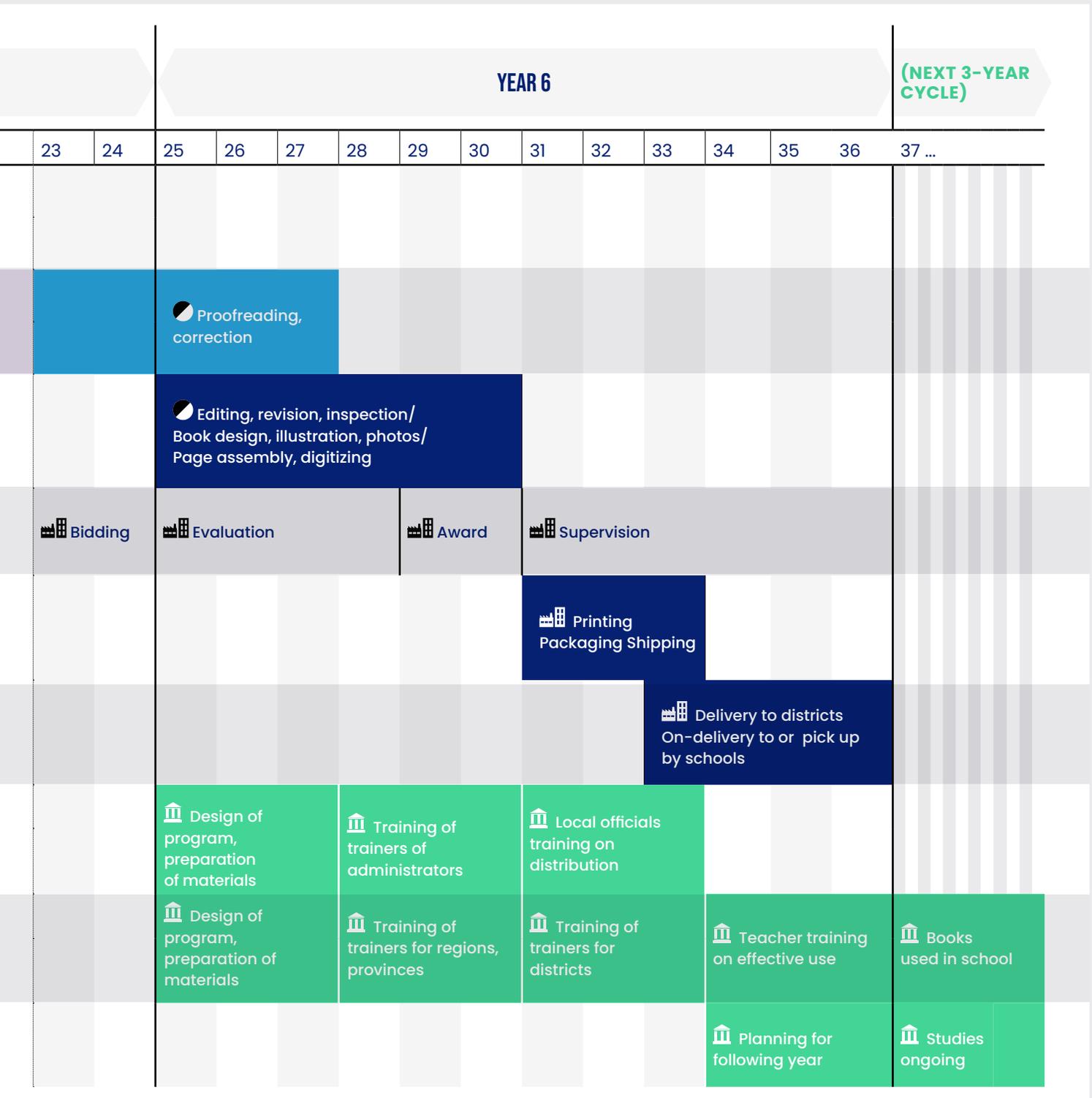
**4 PUBLISHING.** Who is best suited to providing publishing services? At this phase of publication, critical determinations need to be made for ways to maximize the effectiveness of the textbook. These considerations include (i) the design of the books and teacher guides (i.e., their "look"), especially the size of type that is appropriate to the age and reading level of the target students and teachers; (ii) the type of illustrations used, and the need for and use of color printing; and (iii) the number of pages (extent) of the textbook that will be sufficient to cover the teaching requirements of the curriculum. At this point, the technical specifications for manufacturing the book for the number of years it will be in use (its physical life) should also be determined, as well as the number of copies for distribution and reserve, the type and characteristics of the paper, binding and packaging, and delivery and distribution modes.

TABLE 6. SAMPLE 36-MONTH PROGRAM FOR TEXTBOOK PROVISION TO SCHOOLS

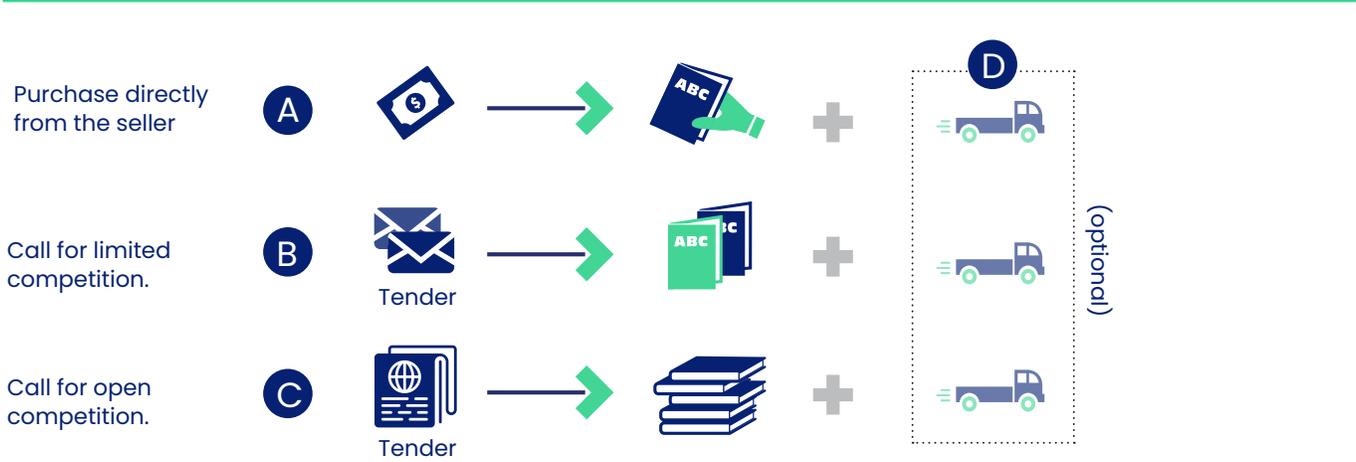
		YEAR 4*											YEAR 5			
		1	...	12	13	14	15	16	17	18	19	20	21	22		
	<b>CURRICULUM DEVELOPMENT OR REVISION</b>	 ESP guidance, research, formulation, testing											 Consultation, adjustment, approval, adoption			
	<b>WRITING OF CONTENT</b>												 Scope-sequence charting, writing, testing, revision			
	<b>PUBLISHING</b>															
	<b>PROCUREMENT</b>												 Planning			
	<b>MANUFACTURING (PRINTING)</b>															
	<b>DISTRIBUTION</b>															
	<b>LOCAL OFFICIALS TRAINING ON DISTRIBUTION</b>															
	<b>TEACHER TRAINING ON EFFECTIVE USE</b>															
	<b>EVALUATION</b>															

Execution:  Usually by government     By government or by industry     Usually by industry

\* Year 4 on the diagram on p. 23



The government can carry out some or all of the publishing activities, but this will require the recruitment of editors, graphic artists and other publications specialists as well as the acquisition of computers, desktop publishing programs, printers and other necessary equipment. These personnel and equipment items are difficult to justify for inclusion in annual recurrent budgetary requests. Contracting with publishing houses or art and design studios for publishing services is more easily justified and can be included in the education ministry’s investment budget.



Procurement options that are available to the government.

**HOW TO EVALUATE QUALITY?** The government through its education ministry’s curriculum and assessment units sets the standards for the content of textbooks and reading materials. For selecting and buying textbooks, the standards are frequently expressed as criteria for evaluating and approving materials for use in school instruction. These include compliance with the curriculum prescribed for the subject area and grade level, sufficiency of content for the school year, appropriateness of language and reading level, adequacy of instructional method (pedagogy), provision of instructional support (teacher guides), and attractiveness of design, typography and illustration. Other criteria address specific policy objectives: gender equity, love of family and country, care for the environment, and so on. The textbook policies of some education ministries and bidding documents of an international development agency provide guidance on using the criteria to discriminate differences in the quality of textbooks offered for sale to the government.

**HOW TO RELATE QUALITY TO PRICE?** In single book adoption, textbook offers are evaluated against a quality norm, and the lowest offered price among those meeting the norm is awarded the contract for national purchase. In multiple book adoption, two or more textbooks meeting the norm are included in an official list of textbooks that publishers, itinerant jobbers and in-town retailers sell to parents and schools. One multinational donor agency requires member countries to follow a formula of combined quality and price evaluation.<sup>10</sup>

<sup>10</sup> See quality evaluation, cost evaluation, and combined quality and cost evaluation in World Bank, “Request for Bids: Textbooks and Reading Materials” (standard procurement document, World Bank, Washington, DC, 2017), 44–49.

**MANUFACTURING.** What are the available options for the printing, binding, packaging and delivery of schoolbooks? The government's various choices for purchasing are listed below.<sup>11</sup> To achieve value for money in book procurement, the government should (i) set technical specifications that maximize economy, usually those conforming to international standards for materials (paper) and processes (printing, binding); (ii) for large volume orders, consider prequalifying prospective suppliers for their financial and technical capacity to satisfactorily perform and deliver on the contract; (iii) carry out the purchase using free, open and competitive procedures; and (iv) for orders of moderate volume, for which prequalification will neither be necessary nor practical, post-qualify the financial and technical capacity of the contractor with the best evaluated offer.

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- **Purchase directly from the seller, without competition.** This procurement method may be justified if the item is proprietary (owned and supplied only by the source), the price is attractive or there is no advantage to be gained in calling for a competitive process. Otherwise, calling for a competitive process is preferable.
  - **Call for open competition.** The government can opt to advertise locally if the technical specifications and quantity of the order are not attractive to international suppliers. Otherwise, advertising internationally is preferable. Therefore, the number of copies of books to be produced is an important consideration.
  - **Call for closed competition.** The government can opt for limited competition, that is, it may decide to invite only a few suppliers, if they are the only available suppliers in the market. Otherwise, open competition is preferable.
  - **Include distribution services** in any of the options above.
- 

**DISTRIBUTION.** Some education ministries engage the services of another government agency or a parastatal corporation for the distribution of educational materials, including textbooks. Other ministries use their own warehousing and transportation facilities and personnel to deliver books to schools. Still others contract this service with the private sector companies to forward the books to regional or district offices or deliver them directly to schools. When books are delivered to local offices, school communities sometimes assume the responsibility for collecting them, using either government-provided funds or their own resources. Which delivery modes work best? The experience is mixed.<sup>12</sup>

**TEACHER TRAINING AND TEXTBOOK EVALUATION.** Should this be the responsibility of the government? Or is it better handled by contracted services? Whether textbooks will be used actively in instruction or kept away from students depends on how well administrators and teachers are informed and motivated to use them. Education ministries provide training to classroom teachers, school leaders and local education administrators on changes in the curriculum; the management of textbook inventory control; the effective use of new textbooks;

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 11 The classification of procurement methods follows the World Bank; see *Procurement Regulations for IPF Borrowers. Procurement in Investment Project Financing: Goods, Works, Non-Consulting Services* (Washington, DC: World Bank, 2016), 35–37.

12 Government delivery systems have been plagued by many issues, including data integrity in Asia (see Smart and Jagannathan, *Textbook Policies in Asia*, 40–42) and inadequate capacity to address losses due to inefficiency and theft in Africa (see Read, *Where Have All the Textbooks Gone?*, 169–71). Evidence that textbooks in sufficient numbers reach schools in a timely manner remains elusive, although some countries have reported meeting distribution targets in successive years (see GPE, Results Report 2019 [Washington, DC: GPE, 2019], 121).

TABLE 7. THE GOVERNMENT’S POLICY OPTIONS VIS-À-VIS THE PRIVATE SECTOR

	PROCESS	GOVERNMENT	PRIVATE SECTOR	GOVERNMENT’S POLICY CHOICES
	<p><b>PLANNING, CURRICULUM DEVELOPMENT</b></p> <p>Organizing knowledge and skills to be taught and learned</p>	✓	✗	<ul style="list-style-type: none"> <li>• Prescribe term of effectiveness of the official curriculum; or</li> <li>• Maintain curriculum in force until further notice</li> </ul>
	<p><b>WRITING OF CONTENT</b></p> <p>Generating book content that imparts the curriculum in language students can understand</p>	✓	✓	<ul style="list-style-type: none"> <li>• Form in-house writing teams; or</li> <li>• Commission writing with individuals, firms or public or private organizations</li> </ul>
	<p><b>PUBLISHING</b></p> <p>Transforming manuscript to error-free book pages of text and illustration ready for printing or electronic dissemination</p>	✗	✓	<p>Procure:</p> <ul style="list-style-type: none"> <li>• All publishing services under one contract; or</li> <li>• Editing, illustration, page assembly, electronic capture in separate contracts</li> </ul>
	<p><b>MANUFACTURING</b></p> <p>Printing, binding, packaging, shipping of books in large quantities</p>	✗	✓	<p>Procure printing service:</p> <ul style="list-style-type: none"> <li>• From local contractors only, to support the local publishing industry; or</li> <li>• From international contractors, for best quality and price</li> </ul>
	<p><b>DISTRIBUTION</b></p> <p>Delivering to regional and district offices, to schools</p>	✓	✓	<ul style="list-style-type: none"> <li>• If printed locally, require delivery from printing plant to region, district or school</li> <li>• If printed overseas, require delivery to ports, region or district; arrange onward distribution to schools by contract or by local administration</li> </ul>
	<p><b>TEACHER TRAINING, EVALUATION</b></p> <p>Orienting teachers on curriculum, effective use of materials</p>	✓	✗	<p>Training:</p> <ul style="list-style-type: none"> <li>• Designed as stand-alone course on use of books and materials; or</li> <li>• Integrated with regular in-service teacher training program</li> </ul>
	<p>Assessing program effectiveness, impact on learning</p>	✓	✗	<p>Evaluation:</p> <ul style="list-style-type: none"> <li>• Government research agency; or</li> <li>• Contract with private agency</li> </ul>

and the care and storage of learning materials. The choice here is to conduct the training (i) as a dedicated short course to orient teachers and administrators on the new curricular requirements and the use of the new textbooks, or (ii) as part of a larger, nationwide in-service teacher training program. The first option is short and focused on new objectives, materials and pedagogy; the second option makes teacher orientation a regular feature of institutionalized training activities, such as teachers' summer institutes. An alternative is to arrange the orientation program with teacher training institutions or with training service providers in the private sector, including publishing firms.

Similarly, the evaluation of the textbook provision program and of gauging the impact of textbooks on student achievement can be done in-house, if sufficient institutional capacity exists in the education ministry, or by arrangement with other government agencies such as public universities or educational research institutes. The government option is more feasible for a relatively straightforward program evaluation. Impact evaluation, which is a complex and multiyear undertaking involving sophisticated research design, fieldwork and quantitative analyses, is better handled by experienced, equipped and well-staffed research organizations.



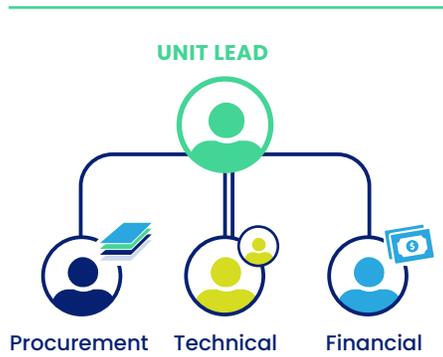
## GUIDANCE: EFFICIENCY AND EFFECTIVENESS

With the many and complex stages that are involved in publishing and distribution, the provision of books for schools is an ongoing annual task of government. However, the responsibility for providing books is usually fragmented among several government agencies. Planning may be in one department or agency, such as curriculum and publication in the central research units of the education ministry; procurement in administration and finance; distribution in general services; and training and evaluation in separate departments or attached institutes. Such institutional arrangements make it challenging to manage the overall provision process as well as to develop an effective strategy for developing, improving and sustaining management capacity.

Moreover, knowledge about **effective management** of the publication process is not well known or, even when it is known, it is often not practiced well. This knowledge includes updating and verifying the quality of the government's data on school enrollments and available inventories; editorial responsibilities for book manuscripts before they are given to contractors for publishing or printing; the follow-up after contracting and during the entire time the book is undergoing publishing and printing; and monitoring of deliveries to confirm that the books actually reach schools.

**ORGANIZE FOR CAPACITY-BUILDING.**

Enhancing the capability of personnel, instituting procedures for organized work and continually upgrading workers’ skills and ways of working involve (i) the enactment of laws, the formulation of rules and the issuance of regulations; (ii) the assignment and management of funds; (iii) the training of personnel, both in government and in private industry; and (iv) creating or designating an individual, team or unit with the authority and responsibility for overall management of the government’s book provision program.



Textbook procurement requires a variety of expertise and coordination.

Developing capacity is the responsibility of the government agency owners of each regulation, or budget, or training program or staff. In many countries, establishing procedures and improving skills for the conducting of public services following the procedures lie with the education ministry’s curriculum unit for the **educational aspects** of book provision (content origination, evaluation of the quality of offers; coordination of teacher training and testing) and with the procurement unit for the **industrial aspects** (tendering, contracting, distribution).

Developing capacity for overall coordination and management of the entire book provision process is institutionalization. It can start simply, by designating an incumbent official or an established administrative unit (e.g., curriculum, or procurement), as the designated coordinator in charge of the overall process.

**MANAGE CAPACITY-BUILDING.** An individual or team made up of current staff can be designated responsibility for overseeing capacity-building; this is a cost-neutral action that does not displace any previously programmed activity. Two capacity-building activities can run simultaneously, one for technical (or operational) capacity-building, the other for financial (or budgetary).

- **Technical capacity development** involves continually improving and codifying the ways in which government units discharge their responsibilities and continually training personnel to carry out their respective tasks. In donor-assisted programs, capacity development means transforming expert technical assistance from a substitutive to a developmental role. For example, consultants contracted to devise efficient procedures for manuscript review and trying out content in classrooms should also be

required to train curriculum specialists in how to follow these procedures after the conclusion of the technical assistance, and international experts engaged for contract management should also be required to train national counterparts to take over this function and improve its operation after the contract is over.

- **Financial capacity development** involves improving budget analysis and preparing for financial independence. In programs with donor financing accounted as *investment budget*, the government should progressively increase its share of annual expenditures over the life of the program and account for it as part of regular, *recurrent budget*. This will mean prudently managing the growth of fixed costs (staff salaries, administrative expenses) to create resources for *variable costs* (writers' and editors' services, printing and distribution contracts)—with a view to establishing sustained funding for books after donor financing ceases.

To institutionalize transparency, the content and intent of capacity development management should be disclosed to stakeholders. It should proceed in consultation with government departments as well as with the publishing and printing industry in the private sector. The competitive quality and price offered by the selection of consultants should be the method of procurement used. To make the designated official or unit accountable, the government's rules and regulations for audit and audit reporting apply.

The measures described above should improve planning and forecasting, elevate equity as a strategic objective to be achieved by the book provision program, and point to the need for training to improve the skill set of the government's education personnel. Over time, the administrative and operational procedures will become routine, which will in turn preserve institutional memory for maintaining book provision in an orderly fashion over the long term.

In effect, delivering textbooks and learning materials efficiently, that is, to all children in all schools, delivers equity in access to education. The government, as the principal provider of basic education, must have the capacity to manage and maintain that delivery, capacity that should be developed.

## CURBING CORRUPTION: IMPROVING ECONOMY AND EFFICIENCY

Illegal activities in textbook provision—principally collusion, bribery and fraud—are costly, and they undermine the value of education service. The adoption of standard international specifications for manufacturing, procurement and evaluation procedures, monitoring and auditing, and the engagement of civil society as watchdogs, especially in distribution, will minimize corrupt practices.

*Corruption is the abuse of power for private gain. Corruption takes many forms, such as bribery, trading in influence, abuse of functions, but can also hide behind nepotism, conflicts of interest, or revolving doors between the public and the private sectors. Its effects are serious and widespread. . . . It acts as a drag on economic growth, by creating business uncertainty, slowing processes, and imposing additional costs.<sup>13</sup>*

Providing books to schools is a complicated process that involves many actors, requires large amounts of money, and takes place over long periods of time. This complexity provides many opportunities for illicit practices to happen along the way. Examples abound: Suppliers may collude with government officials to prearrange winning bids, purchase prices or contract awards; corruptors may pay bribes to change winning bids or to increase the prices for textbooks, or to arrange for badly manufactured books to be accepted; or short or altogether “ghost” deliveries may be fraudulently documented as completed and billed for payment. Malpractice is significant in the procurement of books, especially textbooks, and in book distribution. Unfortunately, government inspectors and auditors alone are neither adequately trained nor sufficiently resourced to police the system and catch the crooks. This allows the abuse of public funds for private gain to fester, to the disadvantage of teachers and schoolchildren.

## WRONGDOING AT KEY STAGES OF THE PUBLICATION PROCESS

Institutional and social resources can be focused to shine light on some of the dark corners of the book provision process, however, and make them more transparent. Especially in book manufacturing and distribution, the participants (both public and private) can be identified. Table 8 summarizes the typical governance risks (fraud, corruption) as well as suggested measures for addressing them.

13 European Commission, “Corruption,” Migration and Home Affairs (website), accessed October 30, 2021, [https://ec.europa.eu/home-affairs/what-we-do/policies/organized-crime-and-human-trafficking/corruption\\_en](https://ec.europa.eu/home-affairs/what-we-do/policies/organized-crime-and-human-trafficking/corruption_en).

**TABLE 8. RISKS TO GOVERNANCE IN TEXTBOOK PROVISION AND POLICIES FOR ADDRESSING THEM**

PROCESSES	GOVERNANCE RISKS	POLICY MEASURES
 <p><b>PUBLISHING</b> Transforming manuscript to error-free book pages of text and illustration ready for printing or electronic dissemination</p>	<p><b>Collusion</b> Government officials and private interests may prearrange the winners of competitive bidding, the official adoption of textbooks, contract awards for government book purchases, or contracts for book printing</p> <p><b>Bribery</b> Contractors may give cash or gifts in exchange for government contract awards</p>	<ol style="list-style-type: none"> <li>1 Adopt standard international industry specifications for paper, printing, binding, packaging</li> <li>2 Impose third-party testing of materials</li> <li>3 Quantify evaluation criteria</li> <li>4 Train technical bid evaluators; sequester them during bid evaluation</li> </ol>
 <p><b>PARTICIPANTS</b> Largely private sector: publishers, printers, design studios</p>		
 <p><b>MANUFACTURING</b> Volume printing, binding, packaging, shipping</p>	<p><b>Bribery</b> Contractors may give cash or gifts in exchange for official acceptance of substandard goods, or for approval for payment of goods not delivered or service not performed or completed</p> <p><b>Fraud</b> Substandard materials may be used for book manufacturing, but (falsely) certified as passing quality control test results</p>	<ol style="list-style-type: none"> <li>1 Require submission of materials samples for independent evaluation</li> <li>2 Conduct in-plant inspection prior to shipping</li> <li>3 Subject deliveries to inspection, and payment requests to preaudit</li> </ol>
 <p><b>PARTICIPANTS</b> Government printing press, OR private sector printing companies</p>		
 <p><b>DISTRIBUTION</b> Delivery to regional and district offices and schools</p>	<p><b>Fraud</b> Officials may approve payment for books not ordered or not delivered; school or local officials may pocket discounts given by booksellers for official purchases, or kickbacks in overpriced delivery or distribution contracts</p>	<ol style="list-style-type: none"> <li>1 Print price prominently on book cover</li> <li>2 Adopt tamper-proof verification measures, including electronic tracking and hands-free reporting of books from origin through to destination</li> <li>3 Preaudit claims for payment of book deliveries</li> <li>4 Engage civil society organizations to witness, and news and social media to broadcast, book deliveries to schools</li> </ol>
 <p><b>PARTICIPANTS</b> Private sector freight forwarders from central government to region; local agencies from region to school</p>		



## GUIDANCE: CURBING CORRUPTION

**KNOW THE CHOICES FOR IMPROVING GOVERNANCE.** The fight against corruption must involve the government's tender committee on bids and awards and its technical procurement unit, all contractors (publishers, printers, freight forwarders, book wholesalers and retailers), the government's regional and district officials, school principals, national and local media, and civil society organizations.

- The choices for improving governance are both institutional and social. The institutional choices involve strengthening the administrative and procurement processes in the provision of books; this includes ensuring fairness in the distribution of resources for the development, procurement and distribution of textbooks and learning materials in the education sector plan.
- In administrative procedures, ensure that the mechanisms for funding books are adequate: that there is timely communication of the availability of budgeted funds to central, regional and local government units; expeditious authorization and release of funds for contracting and payment; and reasonably simple reporting of fund expenditures.
- Disclosing the criteria for evaluating bid offers in the solicitation or bidding document, the evaluation instrument itself, and the scoring scheme removes the secrecy surrounding evaluation. It allows bidders to evaluate for themselves how well their offer would meet the government's criteria.
- Public release of public bidding information (not evaluation) averts any attempt to alter bids after the bid opening. Uploading the information on the government's website strengthens the government's intention of maintaining transparency in the procurement process.
- Forming evaluation teams made up of curriculum specialists, practicing teachers and writers of children's stories provides a balanced view of the content and appropriateness of the books offered in bids.
- Timely announcement of the results of bid evaluation preempts attempts to change the results of the evaluation and helps keep the process free from corruption.

The social option for governance is specific to distribution. It involves forming partnerships with civil society organizations that operate at the district or community levels, to assist government inspectors and auditors in monitoring the delivery and use of books in schools. Volunteer organizations can confirm the official records of delivery and receipt and, more importantly, disclose their findings to the media. Although care must be taken when using the media (since some newspaper owners may also be interested bidders to government contracts), information carried by the media travels more quickly

than official reports do and can thus provide parents as well as school and district leaders with additional assurance that the deliveries promised were made correctly, and on time.

**ORGANIZE FOR THE FIGHT AGAINST CORRUPTION.** Procurement policy must require that bidding documents transparently disclose bid evaluation criteria and quantitative score values in bid evaluation; training policy must specify continual upgrading of evaluators' skills; and budget planning must include appropriations for small grants to civil society volunteer organizations witnessing and monitoring book deliveries in schools.

To raise the quality of the bidding process and thereby minimize occasions for corruption, the possibility of receiving technical assistance from international book procurement experts should be explored. Especially in the case of book procurements that are financed from external funds, expert help can be made available at little or no cost to the government. Similarly, engaging the collaboration of civil society can be cost-neutral to the government. The relatively small amounts needed to train and transport monitoring teams can be paid from the government's regular annual appropriations for grants or operational expenses, or they can be paid by the donor-assisted project concerned.

The corruption fighters must themselves be held accountable. All procurement actions are subject to government audit. Especially in procurement, additional oversight can be made available from donors who provide policy advice and financial and technical assistance. The national media can also be a partner in transparency, reporting on the effectiveness of book procurement and distribution, and when it occurs, on corruption as well.



Community supervision helps reduce corruption.

- **Corruption puts equity at risk.** Under both single and multiple book adoption policies, corruption raises costs and prices, and in turn threatens the government's ability to provide education more equitably. In multiple book adoption, the added cost of illegal transactions is passed on to the consuming schools or parents. In single book adoption, the estimated amounts for bribes are rolled into the publishers' bid offers as "part of the cost of doing business." In both types of policies, higher prices have the effect of reducing the government's buying power, which in turn limits its ability to provide materials equitably to all students, especially to students who are enrolled in schools in very remote locations, who must learn in a different language or who have physical or cognitive disabilities.
- **Good governance enhances equity.** In book procurement, a transparent process assures suppliers of an equitable chance of their books being selected for purchase by the government. In book distribution, when books are delivered as ordered, with the assistance of civil society monitors, they become available to all students, assuring them of equitable access to education.

# CONFRONTING THE CHALLENGES: POLICY GUIDANCE

Policies steer textbook programs. The government must clearly state (i) whether books will be provided to all students, (ii) whether there will be just one or several books to choose from per subject, (iii) whether the books will be in the language of instruction, (iv) whether they will be provided to students with different learning needs, and (v) what the distribution scheme will be. The formulation of policy should be both organized and consultative.

A textbook is a small and relatively simple product, made of paper printed and bound together, compared to the building of a classroom. However, getting a child to learn something from a book, with the help of a teacher who is trained to use it in class, is a complex, multistep process that is fraught with many risks along the way. Well-planned government policy can help mitigate those risks and prevent their occurrence.

## ENHANCING EQUITY IN BOOK PROVISION THROUGH GOVERNMENT POLICY

Textbooks are of critical importance in the educational process. They are bought and used in large numbers, and the government, in guaranteeing education for all, assumes responsibility for providing them. Therefore, the national textbook policy is of key importance. It sets out what the government will and will not do. Will it provide textbooks for all students? If textbooks will be provided, will they be sold, loaned or given to all students without charge? Will they be provided in all subjects, or for some subjects only, and if so, which ones? How many years will a textbook be officially used in schools?



The national textbook policy should clearly answer these questions. More importantly, it should articulate the government’s active pursuit of equity in educational opportunity by clearly stating the choices it has made on the matters of policy briefly described below.

**PROVIDE TEXTBOOKS FOR ALL.** Achieving a book–pupil ratio of 1:1 in all grade levels and all subject areas for primary and secondary education is the most equitable approach. However, this policy will impose an unsustainable financial burden for the government. An alternative is to provide textbooks at different ratios. For example, providing one book for every two pupils (1:2) will reduce the cost by half. Or providing books for all in the early grades when reading and computational skills are still being acquired and then varying the book–pupil ratios in later grades and for different subjects when children have become independent learners can reduce costs substantially.

**CHOOSE SINGLE BOOK ADOPTION OR MULTIPLE BOOK ADOPTION.** There are very different costs and operational features depending upon which of these policies the government selects. The benefits and risks, as well as the cost implications of adopting each policy were discussed in “Economy: The Right Quantities at the Right Price,” above.

**PROVIDE TEXTBOOKS IN THE LANGUAGE OF INSTRUCTION.** This policy should refer not only to the national language but also to major languages spoken in various regions of the country, as well as the mother tongues used in initial literacy and early grade instruction by minority communities. The capacity for publishing learning materials in many languages will obviously be limited, both for the government and in the private sector. The adoption of this policy should be informed by the following:

- **Public–private partnerships.** The provision of instructional materials is feasible in the national language and sometimes—when basic content and funds are available—in the other major languages of the country as well. But the availability of content, if not budgetary funds, are scarce for developing materials in a variety of mother tongues, especially for small minority communities. To help bridge this gap, the government can mobilize volunteer, nongovernmental organizations to work with local governments in promoting literacy in mother tongues and developing instructional content that the national government can produce for minority communities.
- **Language research.** A related policy initiative is for the government to support ethnographic and linguistic studies focused on the identification, standardization and orthographic development of minority languages, those that are as yet unwritten but have a sufficient number of native speakers who should be provided with initial literacy instruction in their mother tongue. The government should also reach out to international donors for support in this important basic research effort.
- **Downstream implications.** Initial literacy in the mother tongue facilitates a student’s acquisition of reading skills. Once this skill is acquired, ideally the student should continue reading for at least a year in his or her mother tongue. After mastering this skill, students can transition to reading and other skills in a language of wider communication, usually



Single versus multiple book adoption is a critical policy choice.



Mother tongue learning materials have benefits for early learning but require careful transition to national language of instruction in higher grades.

a national or international language. This process of transition needs careful analysis and curricular planning, teacher recruitment and deployment, appropriate learning materials, and budgetary resources.

**PROVIDE TEXTBOOKS TO SPECIAL GROUPS.** Of special interest to GPE, this policy addresses the need to provide materials that ensure equal learning opportunity for girls as well as for students with specific learning needs or those with visual, auditory or other disabilities. However, this policy is costly to implement and difficult to maintain, especially by under-resourced education ministries with limited capacity to deliver the needed services. Governments must continue to build their knowledge base (concerning the types of disabilities, the numbers and locations of students with special needs, etc.), raise awareness, and campaign for financial and technical support to respond adequately to these needs. New programs should be tried and tested, especially those promoted by international development agencies and nongovernmental organizations. Among these are (i) working with community-based organizations to support the creation and provision of learning materials to special groups, and (ii) the piloting of new processes, including digital delivery of learning content and electronically aided control of book distribution. The challenge is to raise government resources for developing instructional approaches for children with special needs, training special education teachers and delivering instructional print materials, including textbooks and other books for basic and remedial reading, audio books for the hearing impaired and books in braille for the visually impaired.

**ADOPT A TEXTBOOK PROVISION SCHEME.**

Governments should consider the following policy options:

- **Give textbooks free to all students.** Under this policy, books will need to be printed in very large quantities for distribution in the current and succeeding years or reprinted annually. As noted above, this would create a heavy fiscal burden on the government.
- **Sell or rent textbooks.** This policy would be a blow to equity in education, as it would discriminate against poor parents, who might pull their children from school because of their inability to buy the books or pay the rental fees. It would also hold teachers and school administrators accountable for the collected sales or rental proceeds, an added, and unnecessary, responsibility.
- **Issue textbooks loan-free.** Under this policy, textbooks are given to students free of charge for their use, to be returned at the end of the term. This policy is equitable, but it could raise manufacturing costs by requiring sturdier paper, binding and additional protective coating on the cover surfaces of the books, to make them last for several years under conditions of normal use. Teachers and parents would also need training on the proper care, repair and storage of textbooks returned at the end of the school year, to extend the physical life of the books, and to make students, parents and teachers appreciate their value.

	 free	 rent/ sell	 loan (free)
 cost			
 equity			
 maintenance			

**ADOPT A DISTRIBUTION SCHEME.** The most equitable policy option is to contract the purchase of textbooks, including distribution to all schools, including those that are difficult to reach. However, this is impractical in many developing countries. Publishers and printers are most capable of developing textbooks, printing them and delivering them in bulk to one or a few locations; they are not well set up to undertake distribution to schools. The latter is better done by bookstores, who buy books wholesale from publishers to sell retail to the book-buying public, or by freight forwarders, who can distribute books to districts and schools, provided they can be reached by road. Another option is to procure the books at the central level, for delivery to regional or provincial locations, and to provide financial and technical assistance to regional and provincial authorities, as well as to civic and community organizations, for the onward distribution of books from there to the schools. As they are frequently immersed in local projects, nongovernmental organizations can also be effective in ensuring that books reach even the most remote schools, as discussed above in “Curbing Corruption: Improving Economy and Efficiency.”



Different options for textbook distribution.

**ENCOURAGE TEXTBOOK USE IN INSTRUCTION.** A textbook is only effective if it helps students learn, and the textbook provision process has value for money only when textbooks end up in the hands of students. Adopting a policy that actively promotes the use of textbooks in instruction will increase the demand for textbooks in schools. It will also provide incentives for (i) local administrators to attend training sessions on textbook distribution, inventory control and the maintenance of storage facilities and materials; (ii) teachers to attend in-service programs on how to use the textbooks effectively; and (iii) inspectors, academic supervisors and school leaders to see that the policy is being enforced. As textbooks become a regular part of classwork and homework, allowing students to take the books home will become necessary. At that point, administrative measures will have to be adopted to allow for better reporting of inventory shrinkage owing to losses, or wear and tear, and for easing teachers’ accountability for the books. This policy can contribute to improved instruction and learning, but it can also reduce the incidence of textbook use. It should be a goal to eventually eliminate the practice of locking away textbooks for fear of loss or damage.

**ORGANIZE FOR POLICY FORMULATION.** A good national textbook policy is formulated in consultation with in-country development partners, and with policy drafters holding local, regional and national discussions with educational researchers, political leaders, teachers’ unions, school community leaders and publishers in the private sector. To ensure compliance with policy, a guardian regulatory body will be needed. This body, in some countries called a textbook board or an educational materials council, is the authority that will issue rules and regulations for implementing the policy and serve as the public face of the policy as well as the forum for receiving feedback from private industry and the general public. Just as capacity for technical and financial management needs to be built for efficiency and effectiveness of book provision programs, in like manner the capacity to formulate and promulgate policy will also need to be developed, to see that programs also keep promoting equity in education.

# CONCLUSION

This note provides guidance on how to maximize value for money by providing the right textbooks at the right time, to the right places. It applies the value for money concept broadly, without attempting to cover all the elements involved in the process of textbook development, purchase and distribution. Rather, it highlights the areas where significant decisions—those with the greatest consequences for the use of domestic and foreign resources in supporting learning through textbooks—must be made.



In itself, this note should provide helpful guidance, though some areas overlap with other areas contained in any education sector plan. Other guidance notes focus on schools and teachers. These three areas of focus are certainly linked, yet significant efficiency gains can be made in each one individually.

Throughout this guidance note, which is aimed at policy makers in partner countries, the emphasis is on practicality, and the choices that must be made. A recurrent theme is the link between the ability to provide equity in education and corruption. While both are difficult to address in a definitive way, it is clear that different choices have different consequences. As such, this note is intended to foster productive discussion, examination and dialogue concerning these important issues. ◀

# ANNEX A:

## SELF-REFLECTION – A CONTINUAL LEARNING PROCESS

Evaluation can show whether policies or programs are achieving their goals. In the provision of textbooks and learning materials to schools, it can determine the extent of effectiveness of the program. Donors and governments are mandated to regularly monitor the performance of their education programs and projects, and to assess and document overall performance. Lessons learned during implementation can benefit future operations.

Evaluation can also measure the impact textbooks and learning materials are making on student learning. Rigorous impact studies of textbook and reading projects report that the use of books can raise levels of student achievement. This achievement can be remarkable: “Measured in units of standard deviation, the alteration in science achievement in the Philippines is twice the impact of what Glass and Smith (1979) conclude would be the result of reducing the size of the average class in North America from 40 students to 10.” More significantly, “the effect . . . appears to be the most pronounced among the children who are most impoverished and whose home backgrounds are the most underprivileged.” Contrary findings have also emerged, pointing to the need for identifying blind spots when critically looking at the book development process, and obvious inadequacies in teacher training.<sup>1</sup>

Unfortunately, regular budgetary or external program support for evaluation is rarely provided. Consequently, the evaluation of book provision programs and the impact of books on learning is neither a regular activity of education ministries in developing countries nor mandatory in donor-assisted book programs.

**THERE ARE GAPS IN OUR KNOWLEDGE OF IMPACTS ON LEARNING.** The evidence regarding the effectiveness of testing, providing textbooks and learning materials, and the impact of materials on children’s learning is sparse and scattered over time.<sup>2</sup> Governments and donor agencies have yet to make a commitment for consistent support for the evaluation of interventions, and to encourage ministries of education to set out in their education sector plans the specific outcomes expected in testing, management and learning. Once set forth, evaluation objectives can be formulated, evidence gathered and longer-term knowledge accumulated. This will elevate evaluation to a level of necessity and importance and will provide policy coherence for the various assessments carried out in projects.

1 For the impact on learning, see Heyneman, Jamison, and Montenegro, “Textbooks in the Philippines,” 147. The reasons for textbooks not impacting learning (content too difficult, books kept from students, no incentive payment to teachers, reduced parent spending on books) are summarized in Pritchett, “Creating Education Systems Coherent for Learning Outcomes,” 37.

**EVALUATION CAN SHED LIGHT ON EQUITY ISSUES.** The contrast in various findings on books and student achievement points to the need to evaluate the quality and appropriateness of textbook content, and the need for teachers to be trained on using materials in class, among other educational issues. In addition, to evaluate the system, the costs, timeliness and effectiveness of the operation must be reviewed. This includes, among other institutional concerns, the efficiency of procurement and contract execution, the extent of coverage (i.e., book–pupil ratios), distribution performance, and the economic cost of fraud and corruption in the process of providing textbooks to schools.

More importantly, what is usually not included in the design of impact evaluation are the impacts of textbooks and learning materials on extending and improving the education of girls and of minority students, usually disadvantaged groups: children in remote schools, who speak mother tongues other than the official language of instruction, and those whose families are extremely poor or who suffer from physical or cognitive disabilities. These groups represent what is not equitable in the provision of textbooks and learning materials. Evaluating the impact on these minority groups must be part of the evaluation design.

- 2 B. Snilstveit et al., *Interventions for Improving Learning Outcomes and Access to Education in Low- and Middle-Income Countries: A Systematic Review*. *3ie Systematic Review 24* (London: International Initiative for Impact Evaluation, 2015), 29–30, provide details of Pritchett’s above summary:

The results suggest a relatively consistent pattern of no effects on learning outcomes, as measured by math, language and composite test scores. In the case of the Schools Assistance Programme in Kenya, there was a negative effect on math test scores (Glewwe, Kremer & Moulin 2009). Similarly, the government–run textbook program in Sierra Leone failed to have any impact on students’ learning outcomes. The program did, however, appear to have improved teacher performance and student attendance, particularly for older girls. The authors of the study suggest that enhanced access to textbooks may have made teaching easier, and increased teacher motivation (Sabarwal, Evans & Marshak 2014) . . . .

The evidence suggests that many of these programs experienced implementation challenges. For various reasons, the distribution of textbooks among students did not meet the program goals in India, Kenya and Sierra Leone (Glewwe, Kremer & Moulin 2009; Das et al. 2013; Sabarwal, Evans & Marshak 2014). In Sierra Leone and India, many schools did not receive the textbooks that were due to be provided as part of the program (Das et al. 2013; Sabarwal, Evans & Marshak 2014). There were also reports in Sierra Leone that a large number of textbooks were often kept in storage and not distributed to students. School administrators who did not expect to receive the textbooks were more likely to store them, as they were uncertain if the supply of books would be sustained in the future (Sabarwal, Evans & Marshak 2014). In Kenya, there were reports that some schools used the grants meant for textbooks for other investments, such as classroom construction (Glewwe, Kremer & Moulin 2009).

Materials that are provided to students may not contribute to student learning if they are not appropriately customized. In Kenya, the textbooks were in English, which for most students was their third language; they were therefore too difficult to comprehend (Glewwe, Kremer & Moulin 2009). The four programmes . . . focused on increasing the supply of materials, without addressing other constraints to learning. Other programs that have had more promising effects on learning outcomes, such as structured pedagogy and remedial education, also provide materials. But in these cases, materials are part of a package and are typically integrated with a tailored curriculum. In contexts with a range of constraints, such as low baseline learning levels and poorly trained teachers, materials are a necessary but not sufficient condition for children’s learning.

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Cover photo: A young boy in class learning with his textbook at the Shapara General Primary School, Bangladesh.  
*GPE/Daisuke Kanazawa*