Planning textbook development for primary education in Africa

Report of an IIEP Seminar

Etienne Brunswic
Habib Hajjar

Maputo
19 - 22 November 1991

International Institute for Educational Planning
(established within the framework of UNESCO)

Swedish International Development Authority
Planning textbook development for primary education in Africa
Planning textbook development for primary education in Africa

Report of an IIEP seminar
Maputo, 19 - 22 November 1991

Etienne Brunswic
Habib Hajjar

International Institute for Educational Planning
(established by UNESCO)

Swedish International Development Authority
The views and opinions expressed in this volume are those of the authors and do not necessarily represent the views of UNESCO or of SIDA. The designations employed and the presentation of material throughout this report do not imply the expression of any opinion whatsoever on the part of UNESCO or SIDA concerning the legal status of any country, territory, city or area or its authorities, or concerning its frontiers or boundaries.

The Swedish International Development Authority (SIDA) has provided financial assistance for the seminar and for the publication costs of this report.
Contents

Part I. Report of the seminar 1

Chapter I: Overview of the seminar 3

Chapter II: The state of textbook development in the participating countries 7

Chapter III: The group work, summing up countries’ experience 13

Chapter IV: Specific issues 18

Chapter V: Responsibilities of departments of education and governments 23

Chapter VI: Further recommended actions 27

Part II Selected papers presented at the seminar 29

Orientation Note
by the International Institute for Educational Planning 31

Textbook provision from a donor perspective: an experience of the Swedish International Development Authority
by Ingemar Gustafsson 36

Background paper: Conceptual framework
by Peter Stoye 38

Appendices 45

Selected Bibliography 55
Part I

Report of the seminar
Chapter I

Overview of the seminar

"The teacher and the textbook are the cornerstones of education",

1. Background

The importance of textbooks and related instructional materials in improving the quality of education and student learning achievement in developing countries has been confirmed by a number of empirical studies carried out in the past two decades. As evidence about the importance of textbooks to the educational process has accumulated, more and more countries in the developing world have launched major textbook development programmes and established corresponding units to take care of the complex process of production and distribution. The international community, both at the multilateral and bilateral levels, plays an important role in supporting these national efforts for the provision of school textbooks for all levels of education. The conjunction of these national and international efforts has led to remarkable results whereby millions of students now have access to school textbooks and instructional materials.

However, in spite of these accomplishments, many developing countries have not fully succeeded in providing their school systems with the textbooks needed, especially at the primary level. Although specific data on student-to-textbook ratios are generally lacking, the fragmented available information shows that, in many countries, primary students are either lacking textbooks altogether or required to share them extensively with others. Besides this low level of textbook availability in general, there is a marked variation between urban and rural schools, between subjects and between grades. This shortage is sometimes so acute that the quality of education offered and received must surely be affected, especially in situations where there is chronic shortage of qualified teachers. It seems, therefore, that the textbook supply situation has clearly deteriorated in many countries over the past 10-15 years. Research shows that many shortcomings have been encountered in formulating and implementing school textbook programmes, mostly related to the lack of co-ordinated and cost-efficient policy and the absence of comprehensive and long-term planning to deal with the complex process of textbook development which includes educators as well as many outside groups.

The situation applies particularly to the African continent where the scarcity of appropriate school textbooks and instructional materials is the most serious impediment to educational quality effectiveness. This scarcity will continue to be challenged in the years ahead because the number of pupils in primary schools will continue to increase in a context of economic crisis and educational expenditure reductions falling most heavily on non-salary items such as chalk, maps, furniture, laboratory equipment and textbooks.
As school textbooks constitute the base of school knowledge and thus will continue to play a leading role in the efforts to meet basic learning needs in developing countries, attention to improve the quality of educational services must therefore consider issues of textbook design, production and distribution and of assuring that all pupils at the primary level have access to effective learning materials, on time and at an affordable cost.

In line with the specific strategies addressed after the Jomtien Conference, aiming at improving the conditions of learning and supporting national efforts to implement action plans to meet basic learning needs, a seminar on Planning textbooks development for primary education in Africa was planned and, subsequently took place in Maputo, Mozambique from 19 to 22 November 1991. Organized jointly by the International Institute for Educational Planning (IIEP) and the Swedish International Development Authority (SIDA), the seminar aimed to draw up a policy and planning framework for the development of sustainable textbook development programmes with special reference to primary education in selected African countries to help them meet the expansion of their educational systems and improve their quality.

Specifically, the seminar had the following immediate objectives:

- to assess the present situation prevailing in the participating countries with regard to the provision of textbooks for primary level: problems and bottlenecks, solutions, suggestions for improvement, etc.;
- to attempt to identify the main responsibilities of the Ministries of Education (MOEs) in relation to other entities and bodies concerned with the textbook development process; and
- to give new impetus to the involvement of educational planning units in textbook development with an attempt to identify the specific role to be played by the educational planner.

2. Participants

A total of 29 persons assembled for the seminar (See Appendix II). Nineteen represented the ten English-speaking and Portuguese-speaking participating countries at different levels of responsibilities: high level policy- and decision-makers, top level educational planners, managers of textbook development programmes, curriculum developers, etc. Five participants represented the SIDA Development Co-operation Offices co-ordinating textbook development projects in four participating countries. The faculty was composed of two IIEP specialists and two SIDA consultants. The Director of the UNESCO Office for Southern Africa in Harare, Zimbabwe was also present.

The diverse and strong educational experiences of the participants provided the opportunity for an effective dialogue and concrete outcomes.

3. Agenda and proceedings

The seminar was held at Hotel Rovuma in Maputo with simultaneous interpretation. His Excellency Professor Aniceto Dos Muchangos, Minister of Education in Mozambique, opened the seminar with a welcoming address (See Appendix III), in which he outlined the
deterioration of education in many African countries and presented the challenges and tasks with regard to a defined policy and planning framework for the development of primary school textbooks.

After the participants agreed upon the agenda (Appendix I) the objectives of the seminar and the working methods and procedures were presented and explained. The participants decided to keep a degree of flexibility in the agenda for eventual changes, depending on the direction and progress of the discussions in plenary and working group sessions.

During the first two days the participants presented their national experiences with regard to the preparation, production, distribution and use of school textbooks for primary education. These national experiences had been prepared on the basis of detailed guidelines sent to the invitees by the IIPE
t. By the end of these presentations a detailed picture of the textbook provision systems in the participating countries had been drawn with main emphasis on the problems and shortcomings encountered, and the needs to be fulfilled. In general, overall textbook provision in the participating countries must be regarded as insufficient, especially in the rural and remote areas, and did not constitute a major policy issue by the central planning units in the MOEs. On the basis of that diagnosis, the overall policy and planning issues for the development of sustainable textbook programmes were ready to be taken.

The programme of the first day comprised a visit to Editora Escolar and DINAME respectively in charge of publishing and distributing textbooks in Mozambique.

For the rest of the day and the two remaining days of discussions, the seminar participants were divided into four working groups (Appendix II). A ‘rapporteur’ was appointed for each group and common topics were set for the focus of the discussions: summarizing the main experiences made with regard to the different stages of the textbook development process, minimum requirements of a government textbook policy, main responsibilities of the MOEs in relation with other entities and bodies involved in the provision of textbooks and specific role and tasks of the educational planning function.

When the four groups reassembled to report in plenary it was found that developing and formulating a textbook policy requires a comprehensive and long-term approach, covering all the stages of a textbook development process and co-ordinating all the elements pertaining to the educational system and the publishing industry.

Besides their normal responsibilities of co-ordination with other ministries, departments and partners, and their overall control on curriculum and examinations, MOEs should always warrant equity and quality issues in their textbook policies.

The educational planners’ responsibilities with regard to policy options to be specified and plans to be implemented deal specifically with: setting priority targets,

---

1. The information gathered in the background paper of Angola has been used for the preparation of some tables in the report in spite of the fact that the representative of Angola did not participate in the Seminar. The representative of the African National Congress could not prepare a background paper.
Planning textbook development for primary education in Africa

building up an information base for decision-making and planning, identifying needs, deciding on financing mechanisms and securing adequate budgetary allocations for textbooks.

The participants emphasized their training needs with regard to the formulation and implementation of textbook development policies and the follow-up activities in terms of research, training and dissemination to be undertaken, especially by the IIIEP.

All details concerning the content and discussions in plenary and group work sessions appear in the following parts of the seminar report.

The seminar was officially closed by His Excellency the Minister of Education. In his closing speech, the Minister addressed his thanks to the IIIEP and SIDA for this important seminar, the aim of which was to strengthen the national capabilities of the participating countries in planning the development of school textbooks for their primary educational systems. He stressed the necessity of multiplying these training activities to assist African countries in their efforts to meet the expansion of their educational systems and improve their quality.
Chapter II

The state of textbook development in the participating countries

1. Basic data on first level education

The overall background concerning the situation of the first level of education in 1990 is presented as first level education: global data (Table 1), and in public expenditure on education, first level (Table 2).

In relation to the provision of textbooks, some indications are worth noting. The duration of the first level of education varies from four years (Angola) to eight years (Kenya). Three countries (Cape Verde, Guinea Bissau and Namibia) have very small enrolments and for this reason small print runs per title. In all countries with the exception of Zambia and Ethiopia there are high percentages of untrained teachers for whom textbooks and teacher guides mostly provide a unique source for direction and guidance. In Zimbabwe, according to UNESCO, private education accounts for a very high percentage at the first level.

Investment in textbooks provision is a minor part of educational spending but has an importance in educational performance out of all proportion to the size of investment. The World Bank, 1991.

Investment in textbook provision is only a minor part of educational spending but is also a most fragile one; books don’t vote. The rapid deterioration of the economic situation has resulted in budgetary savings and cuts where it is easiest to apply them, and hence in resources allocated to textbooks. Yet textbook provision has an impact on educational achievement out of all proportion to the size of investment. Public expenditure per pupil in the participating countries varies in the range of 1 to 10 per cent of GNP and even more in Namibia (see Table 2). This expenditure has to be matched with the source of finance for textbooks, either State or family, shown in Table 4. In several countries, like Tanzania, the funds allocated to the first level of education were, in real terms, reduced during the 1980s. This resulted in a deterioration of educational facilities as a whole, especially the teaching/learning environment including the provision of textbooks, and in some cases in a decline of the enrolment ratios.
Planning textbook development for primary education in Africa

Table 1. First level education: global data (1988-1990)

<table>
<thead>
<tr>
<th>Country</th>
<th>Duration (years)</th>
<th>Age</th>
<th>Enrolment (thousands)</th>
<th>Gross enrolment ratio (%)</th>
<th>Number of schools</th>
<th>Teacher/pupil ratio</th>
<th>Untrained teachers %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angola</td>
<td>4</td>
<td>7-10</td>
<td>1 063</td>
<td>43.8</td>
<td>4 111</td>
<td>40</td>
<td>68.3</td>
</tr>
<tr>
<td>Cape Verde</td>
<td>6</td>
<td>7-12</td>
<td>63</td>
<td>110</td>
<td>n.a.</td>
<td>33</td>
<td>n.a.</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>6</td>
<td>7-12</td>
<td>3 047</td>
<td>55</td>
<td>8 373</td>
<td>43</td>
<td>17.5</td>
</tr>
<tr>
<td>Guinea Bissau</td>
<td>6</td>
<td>7-12</td>
<td>313</td>
<td>54.8</td>
<td>652</td>
<td>25</td>
<td>55</td>
</tr>
<tr>
<td>Kenya</td>
<td>8</td>
<td>6-13</td>
<td>5 397</td>
<td>94</td>
<td>14 864</td>
<td>33</td>
<td>36</td>
</tr>
<tr>
<td>Mozambique</td>
<td>5</td>
<td>7-11</td>
<td>1 211</td>
<td>68</td>
<td>3 496</td>
<td>62</td>
<td>31</td>
</tr>
<tr>
<td>Namibia</td>
<td>7</td>
<td>n.a.</td>
<td>1 313</td>
<td>n.a.</td>
<td>1 134</td>
<td>28</td>
<td>80</td>
</tr>
<tr>
<td>Tanzania</td>
<td>7</td>
<td>7-13</td>
<td>3 379</td>
<td>73</td>
<td>10 417</td>
<td>33</td>
<td>n.a.</td>
</tr>
<tr>
<td>Zambia</td>
<td>7</td>
<td>7-13</td>
<td>1 358</td>
<td>94</td>
<td>3 456</td>
<td>44</td>
<td>11</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>7</td>
<td>7-13</td>
<td>2 116</td>
<td>128</td>
<td>4 559</td>
<td>38</td>
<td>54.5</td>
</tr>
</tbody>
</table>

Sources: (i) Participants' country papers; (ii) World Education Report 1991 (UNESCO) by default.

Table 2. Public current expenditure on education 1988-1990.

<table>
<thead>
<tr>
<th>Country</th>
<th>GNP (US$)</th>
<th>Public expenditure on education</th>
<th>Per pupil current expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>as % of GNP</td>
<td>as % govt. expend.</td>
<td>% spent on first level</td>
</tr>
<tr>
<td>Angola</td>
<td>620</td>
<td>n.a.</td>
<td>12.7</td>
</tr>
<tr>
<td>Cape Verde</td>
<td>760</td>
<td>2.9</td>
<td>n.a.</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>120</td>
<td>4.4</td>
<td>9.4</td>
</tr>
<tr>
<td>Guinea Bissau</td>
<td>180</td>
<td>2.8</td>
<td>n.a.</td>
</tr>
<tr>
<td>Kenya</td>
<td>380</td>
<td>6.3</td>
<td>27.0</td>
</tr>
<tr>
<td>Mozambique</td>
<td>80</td>
<td>n.a.</td>
<td>n.a.</td>
</tr>
<tr>
<td>Namibia</td>
<td>1 200</td>
<td>19.4</td>
<td>20.2</td>
</tr>
<tr>
<td>Tanzania</td>
<td>120</td>
<td>4.0</td>
<td>9.1</td>
</tr>
<tr>
<td>Zambia</td>
<td>390</td>
<td>2.7</td>
<td>12.2</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>640</td>
<td>8.7</td>
<td>16.0</td>
</tr>
</tbody>
</table>

* First and second level.
Sources: (i) Participants' country papers; (ii) World Education Report 1991 (UNESCO) by default.
2. Diagnosis of the existing textbook provision system for the first level of education

The background papers prepared by the participants provide a good picture of the actual implementation of the textbook provision systems in the participating countries. This information is summarized as textbook availability, titles per grade, assumed textbook to student ratio Table 3, alternatives in the implementation of textbook provision Table 4, and publishing of educational books by origin Table 5.

(i) Textbook availability

"Textbook availability in the classroom is a simple measure of the overall effectiveness of the textbook provision system", The World Bank, 1991.

In most countries availability of textbooks in classrooms is not really known and can only be assumed with important variations in the estimations. MOE calculations are based on print runs or financial allotments, not on actual presence of textbooks in classrooms. The African book sector studies (summary report) states "generally low levels of textbook provision throughout, but with satisfactory to good ratios in elite schools in important urban areas. There is a marked variation between urban and rural schools. Angola, Kenya, Mozambique, Tanzania, and Zambia all record textbook to pupil ratios of 1:20 or worse in rural areas, which implies only one or two textbooks per classroom" (The World Bank 1991).

In most participating countries the number of titles per grade is high. Cape Verde, Guinea Bissau, Mozambique and Zambia have decided to give priority to core subjects, so as to reduce the number of textbooks: language and mathematics in Guinea Bissau; Portuguese, mathematics, natural sciences, history and geography for grade 5 in Mozambique, i.e. six titles, compared with 11 for grade 5 in Tanzania. Ethiopia reported on an interesting attempt to integrate in an interdisciplinary approach, three subjects (natural and exact sciences and geography) into one new subject 'environmental studies', thus reducing the number of titles.

The single textbook situation is prevalent in most of the participating countries. Only Namibia and Zimbabwe, where textbooks are supplied by the private sector, offer schools a choice between different textbooks. The 'textbook catalogue' compiled by the Ministry of Education and Culture of Namibia for 1992 has more than 160 pages offering some 2,000 titles for grades 1 to 12 in different language versions. The 'short list of essential primary textbooks' issued by the Ministry of primary and secondary education of Zimbabwe in 1989 presents a choice between two or three titles for each subject matter and grade.
### Table 3. Textbook availability in first level education. Titles per grade, assumed textbook : student ratio

<table>
<thead>
<tr>
<th>Country</th>
<th>I</th>
<th>II</th>
<th>III</th>
<th>IV</th>
<th>V</th>
<th>VI</th>
<th>VII</th>
<th>Assumed ratio</th>
<th>Method of financing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angola</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>6</td>
<td></td>
<td>6</td>
<td>6</td>
<td>1 : 5</td>
<td>Sold</td>
</tr>
<tr>
<td>Cape Verde</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>3</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>1 : 1</td>
<td>Sold</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>4</td>
<td>5</td>
<td>7</td>
<td>7</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>1 : 3</td>
<td>Loaned</td>
</tr>
<tr>
<td>Guinea Bissau</td>
<td>4</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1 : 1</td>
<td>Sold</td>
</tr>
<tr>
<td>Kenya</td>
<td>8</td>
<td>8</td>
<td>9</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>11</td>
<td>1 : 6</td>
<td>Sold</td>
</tr>
<tr>
<td>Mozambique</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>1 : 2</td>
<td>Sold</td>
</tr>
<tr>
<td>Namibia</td>
<td>6</td>
<td>7</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>1 : 1</td>
<td>Free</td>
</tr>
<tr>
<td>Tanzania</td>
<td>6</td>
<td>5</td>
<td>8</td>
<td>11</td>
<td>10</td>
<td>11</td>
<td>11</td>
<td>2 : 3</td>
<td>Free</td>
</tr>
<tr>
<td>Zambia</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>1 : 6</td>
<td>Free</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>7</td>
<td>7</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>9</td>
<td>n.a.</td>
<td>n.a.</td>
</tr>
</tbody>
</table>

**Sources:**  
(i) Participants' country papers  

### Table 4. Alternatives in implementation of textbook provision

<table>
<thead>
<tr>
<th>Country</th>
<th>Authoring</th>
<th>Production</th>
<th>Distribution</th>
<th>Financing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angola</td>
<td>S (MOE)</td>
<td>S (MOE)</td>
<td>S (EDIMEL, EMATEB)</td>
<td>F*</td>
</tr>
<tr>
<td>Cape Verde</td>
<td>S</td>
<td>S</td>
<td>S, P</td>
<td>F</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>S (ICDR)</td>
<td>S (EMPDA)</td>
<td>S (EMPDA)</td>
<td>S**</td>
</tr>
<tr>
<td>Guinea Bissau</td>
<td>S</td>
<td>S (EDITORA ESC.)</td>
<td>S (INACEP)</td>
<td>F</td>
</tr>
<tr>
<td>Kenya</td>
<td>S (KIE), P</td>
<td>S (JKF), P</td>
<td>P</td>
<td>F</td>
</tr>
<tr>
<td>Mozambique</td>
<td>S (INDE)</td>
<td>S (EDITORA ESC.)</td>
<td>S (DINAME), P</td>
<td>F*</td>
</tr>
<tr>
<td>Namibia</td>
<td>P</td>
<td>P</td>
<td>P</td>
<td>S</td>
</tr>
<tr>
<td>Tanzania</td>
<td>S (ICD)</td>
<td>S,P</td>
<td>S</td>
<td>S</td>
</tr>
<tr>
<td>Zambia</td>
<td>S (KKF, ZEMP), P</td>
<td>S,P</td>
<td>S (ZEMP, KKF)</td>
<td>S*</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>S (CDU), P</td>
<td>S,P</td>
<td>P</td>
<td>F</td>
</tr>
</tbody>
</table>

*S = State or Para-statal  P = Private  F = Family  
* with subsidy  ** with parent's contribution*

CDU: Curriculum Development Unit  
DINAME: Distribuidora Nacional do Material Escolar  
EDIMEL: Empresa Distribuidora de Material Escolar de Luanda  
EMATEB: Empresa de Material Escolar de Benguela  
EMPDA: Educational Materials Producing and Distributing Agency  
ICD: Institute of Curriculum Development  
ICDR: Institute of Curriculum Development and Research  
INACEP: Imprensa Nacional da Editora y Produção  
INDE: Instituto Nacional de Desenvolvimento da Educação  
JKF: Jomo Kenyatta Foundation  
KIE: Kenya Institute of Education  
KKF: Kenneth Kaunda Foundation  
ZEMP: Zambia Educational Materials Project

**Source:** Participants’ country papers.
Table 5. First level education: Publishing of educational books by origin

<table>
<thead>
<tr>
<th>Country</th>
<th>Local State</th>
<th>Local Parastatal</th>
<th>Local Private</th>
<th>Foreign</th>
</tr>
</thead>
<tbody>
<tr>
<td>Angola</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cape Verde</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ethiopia</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guinea Bissau</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kenya</td>
<td>75%</td>
<td>25%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mozambique</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Namibia</td>
<td></td>
<td></td>
<td></td>
<td>100%</td>
</tr>
<tr>
<td>Tanzania</td>
<td>100%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zambia</td>
<td>90%</td>
<td>10%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>10%</td>
<td>90%*</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Under licence.

Sources: Participants’ country papers.

Due to the economic situation, many countries could not continue to meet the high costs of the free textbook distribution. In Zimbabwe, since 1988, the books produced by CDU are no longer distributed free of charge. The money realized in the sales is banked into a revolving fund set up for the provision of basic educational materials and equipment in the future. Ethiopia has introduced a subsidized loan system as follows: grade 1 and 2 free loan, grade 3-6 about US$0.50, etc. for one year and for the whole set of prescribed textbooks. Out of the proceeds from the loan, 30 per cent is given to schools, 25 per cent to the regional school offices so that they can use it for expanding school library facilities, and the remainder is used for printing more books. In Angola and Mozambique, which operate a sales method, prices are highly subsidized in order to reduce the cost to families. Namibia, Tanzania and Zambia still maintain a free textbook provision scheme. None of the participating countries operates a proper loan/rental system.

(ii) Organization and management:

The objective of a system to provide textbooks is to provide books that are suitable and effective for both students and teachers on a timely and sustainable basis. Barbara Searle, 1984.

Table 4 focuses on the alternatives in organizing four aspects of the provision of textbooks: authoring (book preparation, preliminary publishing tasks), production (publishing and printing), distribution and financing, in the participating countries and Table 5 on the publishing of textbooks by origin. Three main models can be identified:
Planning textbook development for primary education in Africa

(i) The State controlled model. State monopolies exist in six countries: Angola, Cape Verde, Ethiopia, Guinea Bissau, Mozambique and Tanzania. Even where State monopolies exist, the private sector can be associated with the distribution process, as in Cape Verde and Mozambique.

(ii) The ‘Free enterprise’ model as in Namibia where publishing and production is in the hands of the private sector.

(iii) Mixed systems where State and private publishers co-exist. This is the case in Kenya, Zambia and Zimbabwe.

Authoring is mainly the role of MOEs or Curriculum Development Centres within ministries (ICDR in Ethiopia, INDE in Guinea Bissau and in Mozambique, KIE in Kenya, ICD in Tanzania, etc.).

For production and distribution, there are State or parastatal organizations (organizations with proper statutes and budget distinct from ministry) such as EMPDA in Ethiopia, Editora Escolar in Guinea Bissau and in Mozambique, Jomo Kenyatta Foundation in Kenya, etc. all under MOEs.

Parastatal organizations for distribution can come under the Ministry of Information like INACEP, the national printing house in Guinea Bissau, or under the MOE like DINAME, the National Educational Materials Distribution Agency in Mozambique.

On the whole, the organization and management of the textbook provision process varies from country to country, but State or State controlled enterprises still have a prevailing role.

Concerning the origin of textbooks for the first level of education, all the participating countries, with the exception of Namibia, have achieved self sufficiency in the production of textbooks, either under State monopoly or with local private publishers who publish under licence, as in Zimbabwe. Licensing is considerably cheaper than directly importing printed textbooks. Zimbabwe has not only become self sufficient in textbook production at school level, but has begun exporting textbooks to neighbouring countries.

Nevertheless overall textbook provision in the participating countries must be regarded as insufficient especially in the rural and remote areas where there are only two or three copies of a book per class. Despite or because of the high level of State involvement in the publishing process, government commitment appears marginal and is not supported by regular budget allocations. Textbook provision is not seen as a major policy issue by the central planning units in the MOEs.
Chapter III

The group work, summing up countries’ experiences

The first task assigned to the groups was to draw the lessons of their countries’ experiences and come up with suggestions for improvement. A common framework had been proposed to facilitate the analysis: curriculum and authoring, design, printing, distribution, use and funding.

1. Curriculum and authoring

"From an instructional standpoint, the textbook has three main roles: (i) an information role; (ii) a role of structuring and organizing learning and (iii) a role of guiding learning."


There often exists a confusion between the curriculum and the syllabus. The syllabus is ordinarily an administrative text. It fixes the number of subjects to be taught and the periods allotted to each of them as well as the list of contents to be acquired. The syllabus document is the official guideline for textbooks. The issue of pressure groups influencing syllabus formation and hence textbook development policies was also discussed. The need to consult more broadly before syllabus finalization was stressed.

The purpose of the curriculum is to define the objectives of learning, educational content, cultural and social values to be incorporated within as well as the methods and the materials to be used. Curriculum development can be, but must not be, a State responsibility. In the participating African countries, however, curricular reform is an urgent national task in order to render, as recommended by the World Conference on Education for All, basic education more relevant to the socio-economic and cultural environment.

Where State curriculum development centres or units exist, these entities are most often in charge of manuscript writing and authoring, and sometimes of publishing and even distributing their teaching materials as in Zambia or Zimbabwe. But in most countries authoring and publishing are separate functions. The design of a textbook is clearly a publishing function but it should be done in constant interaction with the authoring team.

"A textbook published by a curriculum development centre cannot be correctly evaluated, since the evaluation is the responsibility of the curriculum centre itself."

An IIEP Seminar, 1990

Approval of textbooks should be a process independent from both authoring and publishing. Where curriculum development, textbook authorship and textbook approval are combined, textbooks are often of poor educational quality and traditional. It was further suggested that the approval should be given at the stage of the manuscript and not of the printed book. This could facilitate competition between different textbook proposals and lead to improvement in quality. Countries where private publishing has an important role
usually make a distinction between the 'approval status' awarded to books passed for use as basic textbooks in the classroom, and the 'recommended status' given to books passed for use as supplementary texts, resource, reference or enrichment material.

Delays in the process of drafting manuscripts are frequent in State institutes and ministries. To overcome this handicap one group suggested a special reward to be given to successful authors above their regular salary.

"The book is nowadays produced jointly in a team or a project group."


Who should be the authors? For the preparation of a textbook, should one call on a single author, a team or a commission? The groups expressed different views. It seems that the common practice of having curriculum developers as full time authors has not proved satisfactory; teaching experience is requested. Therefore it was suggested that practising teachers should preferably undertake this task. A solution could be found in the setting up of teams in which subject matter specialists, practising teachers, learning specialists and graphic designers would co-operate.

There was a need felt concerning training for authorship. But can everyone be trained to write textbooks? As part of a strong personal commitment and skill in drafting, textbook authoring requires an understanding of the responsibilities and duties of the other partners in book production: illustrators, designers, publishers. Actual or potential authors could certainly improve their skills through adequate training, which does not mean necessarily through training courses.

2. Design and publishing

"There is a major issue as to how publishing skills can be acquired, and local publishing development encouraged."


The level of publishing skills available for textbook development varies widely. There was a general consensus on the scarcity of skilled designers. (Designers carry out a variety of tasks which include: selecting the typefaces to be used, arranging the layout of the pages, and choosing the style, method, size and number of illustrations.) Usually they have a qualification in graphic design. The lack of professional designers is a bottleneck in publishing. It was also mentioned that for State enterprises it is difficult to retain designers, given the attraction of the private sector. It was recommended that governments should give high priority to the training of this kind of specialists both at national and regional level. It was also suggested that training of national specialists and transfer of expertise through attachments should be included systematically in all contracts with foreign publishers.

The issue of desktop publishing (DTP) was raised. It was felt that there was not enough information concerning the benefits which could be expected in introducing this technique such as allowing greater flexibility in adaptation of materials to suit different regional needs and contextualizing the content, or easier printing and distribution. It was recommended that a donor agency should do a feasibility study about DTP and then arrange a seminar.
3. **Printing**

"It will be difficult to envisage 'a healthy and effective book industry' without having a cost-effective printing apparatus."  
*Kebede Friesenbet, 1991.*

In some of the countries there is enough printing capacity, in others there is not. In many countries there are delays in printing and difficulty in control over the printing process. Private printers, quite often, lack capital and staff, and work under considerable difficulties in selecting, obtaining and maintaining equipment. Sometimes they are expected to carry out functions which normally should be the responsibility of the publisher such as the design of the books and the selection of typefaces.

Several countries suffer from a wrong selection of machinery. Speed gained at one stage of the printing process is often lost by incompatibility in the next, such as book printing capacity exceeding book binding capacity. It was further suggested to limit the different brands of technical machinery in each country in order to facilitate maintenance, but avoiding the creation of monopolies.

There is an urgent need to standardize the equipment and to adopt textbook formats matching the paper and the machine format. When all of the letter press and most of the offset machines installed in a country are suitable for B series, it would be uneconomical to standardize A-series paper size.

Some of the delays caused by the absence of raw material and spare parts could possibly be overcome by setting up an Open General Licence system like in Tanzania. With the assistance of donor agencies, an account in foreign currency has been set up and an open general licence has been given to the Bank of Tanzania with a list of items which can be imported. Some of the delays caused by the absence of raw materials and spare parts could possibly be overcome by setting up such a system.

Paper and board is a major raw material in textbooks. Sometimes governments raise taxes on imported paper rather than on imported books. It was felt that all materials needed for education should be imported tax free.

The lack of professional skill in making design, production and purchase specifications has often impaired the effective use of existing resources. Therefore it was recommended to develop the training capacities for all kinds of professionals concerned with the publishing process: editors, designers, illustrators, printers, etc.

4. **Distribution**

"Priority must be given to the all too frequently neglected distribution function".  
*An IIEP Seminar, 1990.*

In all participating countries distribution is one of the major problems in the provision of textbooks. There is a wide variety of systems, ranging from a completely free market through a mixed economy to a State monopoly. The results vary depending on the constraints of communication and transport systems.
Most countries have a restricted system of outlets, present mainly in the urban areas. Both in State controlled and in the free enterprise model, textbooks are usually available in larger cities. No serious problems are experienced with regard to transportation of textbooks up to the regional or the district level. Problems arise in district to school distribution. Often the responsibility of State monopolies (e.g. Ethiopia, Tanzania) ceases at the district level, and moving the materials to schools remains an adventure left to the initiative of individuals, inspectors, headmasters, teachers and parents, using vehicles, bicycles, donkeys or carrying the books themselves.

One acute issue in some countries is the mishandling of educational funds by district councils, because the money for textbooks is sometimes spent on other priorities or delayed in releasing allocations. Therefore it was recommended that these funds be spent only under the control of the district education officers.

Even if the State provides textbooks free, parents still want access to the books, so that they can follow-up. Therefore it was recommended that copies of free distributed textbooks should be available for sale.

There are often problems of control and accountability for funds collected at the local level when parents are paying loans to schools. It was suggested that both representatives of the school and of the community or of the parents be associated in the management of these funds.

5. Use

Objectives of the use of textbooks:

"(i) to improve the learning process by increasing the effective use by teachers and pupils; (ii) to increase the length of life by making provision for their preventive maintenance and repair."  


In the absence of teaching guides, or if they have not been properly taught how to use them, teachers do not make the fullest use of the textbooks at their disposal. Inspectors and heads of schools, who are responsible for the overall control of resources in the schools, should ensure proper and effective use of textbooks by teachers and students. It was further recommended that book use should be part of teacher training, both pre-service and in-service. In particular, all teacher trainees must be given an opportunity to become fully conversant with the books which they will be using in the classrooms. It is thus essential that the relevant textbooks are provided free to all trainees.

With regard to preservation and repair, teachers must set the example. It was also recommended that when the State provides the books, these should be repaired at the end of each term.

Surveys should be systematically conducted on the two aspects of the use of textbooks: their teaching/learning impact and their length of life.
6. Funding

"The financing problem can be summed up as the need to achieve affordable provision which is also sustainable in at least the medium term."


Finance is an important but often under-considered feature. Little is done in the area of costing in State publishing houses where books are often resold at below cost prices. Books in general are not affordable to parents, and government or donor support is often used to offset costs. It was felt in some groups that where parents are well off, they should pay for the books, and that disadvantaged parents should be assisted.

Some countries showed an interest in setting up a revolving fund or a dedicated fund to ensure the sustainability of textbook provision systems in the future. All groups recognized the need for the countries to be self sufficient and not rely forever on donor funds in this area.

All groups observed the need to review tax surcharge and other levies placed on books.

The second session of group work was devoted to the responsibility of the Ministries and the planning units within. The outcomes are reported under Chapter V.
Chapter IV

Specific Issues

During the presentations and the discussions in plenary several specific issues were raised concerning questions such as setting standards, state or private production, language policies, costs and prices, the case of small countries, donor/recipient relations.

1. Setting standards and targets

"The quality of a textbook is necessarily a relative concept, and a function of its utilization in a given situation." IIEP Seminar, 1990.

Concerning standards and targets for book provision, comparison with free-market western countries is misleading. Competition among publishers and freedom of choice for textbooks does not guarantee quality. A recent French study, reviewing the state of school-book publishing in France, is entitled 'The textbook jungle'.

The criteria for choosing one or another book are very often taken on a political or cultural basis irrespective of the quality of the book. In many countries private religious schools are not using the same books as governmental ones. Anyway the choice is never with the teacher or the student, but mostly with the school or even the county.

There is no available research evidence that multiple choice is more effective in improving learning performances than the single book situation. In countries with a planned economy, the single book is the rule, and there is no difference as regards scholastic performance with market economy countries.

The single textbook situation does not preclude the publishing of different versions of a textbook or of a teaching guide to take into account regional (mountains, islands) or urban/rural characteristics.

The quality of a textbook is not an absolute concept: there is no international standard in this field. We have no research evidence that using four colour print or an abundance of illustrations results in improved learning. The main quality of a textbook is to be adapted to the teacher who uses it; the less qualified the teacher, the more the textbook has to be clear, intelligible and easy. Textbooks, the content of which are ill adapted, are either not used or are misused. Qualified teachers should be able to teach with every kind of book and even without.

The educational efficacy of a given textbook can only be assessed through field research such as the one made in Mozambique by evaluating the relevance and the effectiveness of textbooks produced by Editora Escolar. This kind of research into textbooks and how the teachers are using them should be further developed.

18
Another mythical target, borrowed from industrialized countries, is the 1:1 textbook to student ratio. From an educational point of view, when textbooks are the property of the school and are not taken home, there is only a marginal difference between a 1:1 and a 1:2 ratio, as shown in the study of the Philippines project. There is enough evidence from European countries to show that many students do not acquire all the books prescribed for their grade, and even that instead of their textbook they are often using digests or handouts.

An average textbook to student ratio of 1:2 or 1:3 should be regarded as satisfactory and considered as a target for the coming years. Having a good physical quality textbook for every two children, that lasts for three or four years, gives an annual cost reduction coefficient per pupil of six or eight. Much depends on the way the books are used: simultaneously by the whole class or by groups working on different subjects; e.g. group 1 on a language assignment while group 2 has a maths assignment. Free access to books could also be enhanced if some copies are made available in a school or village library and of course supplementary copies should be offered for purchase.

The special Conference of African Ministers of Education 'Textbooks and Library development in Africa' held in October 1991 in Manchester (United Kingdom) recommended the free provision of full sets of teachers’ books and the availability of at least one textbook for three pupils at the primary level.

2. State or private commercial publishing

"It is important for each country to have some control over and capacity to produce its own textbooks."  

What ought to be a government’s objectives in the area of textbooks? To ensure within the framework of an overall book policy and with the greatest possible sustainability:

- timely and continuous provision of textbooks to all schools;
- at minimal unit costs;
- better suited to the national socio-economic needs;
- reducing imports; and
- creating employment and developing national capacity.

At the various stages of the textbook provision process there may be different options in the countries. The groups have identified three models: the State controlled, the Free enterprise and the Mixed model. For each model, there exist many variations. For instance, State controlled does not mean necessarily that the MOE is involved directly in the whole process from writing of manuscripts to distribution. There can be parastatal institutions and/or State commercial enterprises, etc. or only procedures for tendering or subcontracting. There are also different types of co-operation in the publishing area between foreign and national (State or private) publishers such as licensing, co-publishing agreements, joint ventures with risk sharing, partnership in national companies or national branches of multinational societies. Concerning the different models, useful lessons could be derived from approaches used for transport organization or water distribution.
Whatever the solution, there are two major rules:

(i) To avoid monopolistic situations. Private monopolies are not more efficient than public ones. A totally public system is often subject to the pressure of finance and education ministries and can lead to bureaucratic deviations. A totally private system, based on profitability, will neglect insolvent groups and disadvantaged regions, and often tends to re-utilize existing materials.

(ii) To avoid the proliferation of interacting entities, which is a source of difficulties and will need increased control and monitoring.

Many countries are at a stage of re-examining the role of the MOE in relation to the provision of textbooks. There is now a trend to rely more on the so-called market mechanisms for publishing. But this creates the need to redefine the role of the Ministry and the relations between the State and the market.

3. Languages

Mother tongue language instruction is and becomes a major issue in many African countries, with strong political and cultural connotations relating to the national identity, the cultural identity of different ethnic groups and the specific problems of minority languages, etc. Where textbook publishing in local languages is concerned, several aspects must be taken into account:

- It is not only a matter of textbooks, but of creating a literate environment, which means the existence of newspapers and other books. Local language textbook publishing can not be considered in isolation.

- It will require structural changes in the education system concerning teacher transfer and promotion from one language area to the other.

- Feasibility and costs: local language publishing often raises issues of the shortage of editors and writers with the necessary professional knowledge of the various subject matters as well as of availability of typefaces for special scripts; small print runs undoubtedly will increase the costs without speaking of the bottleneck of distribution problems.

UNESCO subscribes to the principle that education is most successful when given in the language familiar to the learner. Undoubtedly using the mother tongue as a medium of instruction in the first and second grade, while switching progressively to the national language, can facilitate literacy and increase the retention rate at this level. But these advantages have to be weighted in each context. It is better to have a fair textbook provision in one language (be it the national language) than a scanty provision in a few languages. After all, in Europe some hundreds of years ago, the main medium of instruction was Latin.
Nevertheless it is noteworthy that linguistic areas do not coincide with national borders. Eventually books published in a common African language in one country could be of interest to others. This is a plea for intercountry co-operation. A recent Regional Multidisciplinary Seminar on the Harmonization of Educational Publications in Common African Languages (Lomé Togo 1987) recommended *inter alia*:

- the creation of inter-state institutes or of mechanisms of co-operation between the relevant national institutions of countries with common languages, for linguistic and educational research for the use of these languages, and for the preparation and use of common educational books and reading materials; and

- the intensification of co-operation between publishers as well as printers in countries using common languages, for exchange and joint publishing/printing/distribution of educational books and literature in these languages.

In our experience co-operation on a commercial basis in the private sector is easier to develop than co-operation between governmental institutions. Therefore it seems that publishing in local languages must go hand in hand with the development of a local private publishing capacity.

4. Cost and price

> "A textbook as cheap as a can of beer."

We must not confuse cost and price. Frequently direct or indirect and hidden subsidies distort prices and encourage inefficiencies. Therefore it is not easy to compare in terms of economic costs, State production and private commercial production. To this end, it is necessary to take into account the invisible costs included in packages financed under other sources: premises, staff for manuscript writing (part of the costs of curriculum development institutes), and for distribution (which accounts for nearly 40 per cent in the private sector), tax exemptions for government printing, etc.

Prices can be influenced by various considerations. In some countries prices are highly subsidized to match the purchasing power of the families. Sometimes the price of a textbook has been increased with regard to its real cost to take into account expenditures involved with the production of teachers’ guides, or to compensate for regional inequalities in distribution. Most often the price corresponds to the sole production costs.

Significant cost reduction can be achieved mainly on variable costs (e.g. costs concerning the print run) rather than on fixed costs (e.g. costs concerning authoring or design) which are incurred once and for all.
Where unit costs are concerned, the main cost reduction factors are the following:

- standards for book size, matching paper with machines;
- the number of pages (if possible in multiples of a signature, 16 or 32 pages) with a multiplier effect on all subsequent operations;
- the number of colours; and
- the print run of each edition (to be matched with costs of warehousing and amortization of stocks).

Cheap paper and cheap binding results in books which will only last for a limited period of time and have to be replaced quickly. Manufacturing more durable books could increase the total cost by 30 to 50 per cent, whereas the book can then be used for three or more years, that is to say by 6 to 10 students with the effect that the cost per pupil (instead of the unit cost) will be drastically reduced.

Other cost reduction factors are related to the physical and educational life span of the book, and include maintenance at the school level and the durability of the curriculum so that the title must not be replaced too often (a six year period seems to be a minimum).

The need for frequent revisions can be reduced either by using trial editions (often produced by mimeograph or small offset printing) for testing in schools, or by distributing a preliminary or first edition in only one or two regions and to collect feedback from the users.

5. Textbook publishing in small countries

In small countries and island communities, populations are often too small to make the production of textbooks viable and thrifty. One way to overcome this situation could be sub-regional co-operation. For instance, common examination councils could be formed in order to reach a standardization of curricula, opening up possibilities for regional publishing negotiations with publishers for bulk supply and bulk prices. Another possibility is to negotiate with a publisher to produce a special edition of a textbook locally. Desktop publishing and offset printing should also be considered for small print runs.

6. Donor recipient relationship

Donor agencies don’t have projects of their own. Their role is to assist national authorities in the provision of textbooks. But it is clear that choices are national, each country having its own set of local characteristics involving such things as paper supply, printing and publishing expertise, the existence of a private sector industry, distribution networks, storage facilities and many other factors. The most important role of the donor as also stated at the African Ministers Conference on Textbooks in Manchester, is to assist in capacity building and transfer of know-how.

For example, as a result of an analysis made by the MOE assisted by Swedish consultants, SIDA will no longer be involved in the actual production of textbooks in Mozambique; its role will be to help the Ministry meet the costs of subsidies necessary to create conditions for an equal provision of textbooks to all children.
Chapter V

Responsibilities of departments of education and governments

"A new impetus to the involvement of educational planning units in textbook related programmes and projects."  

One of the objectives of the seminar was to identify the main responsibilities of the Ministries of education in relation with other entities and bodies concerned with the provision of textbooks and in particular the role of the educational planning units. (The term Ministry of Education is intended to cover all public authorities responsible for the development of primary education, depending upon each national system; planning unit means the function of planning and forecasting which is sometimes located in the cabinet of the minister). The various actors and entities concerned with textbook provision are shown in Table 6. This issue was taken over both in the groups and in the plenary.

Table 6. Actors and entities concerned with textbook provision

| Ministries of Education and Culture | Political Groups |
| Ministries of Trade | Subject Panels |
| Ministries of Finance | Curriculum Development Centres |
| Ministries of Information | Inspectorates |
| Ministries of Industry | Teacher Training colleges |
| Ministries of Agriculture | Universities |
| Ministries of Transport | Schools |
| Educational Planning Units | Teachers |
| Directorates for Primary Education | Parents' and Teachers' Associations |

Local Educational Authorities
- Local Governments
- Publishers
- Printers
- Booksellers
- Transporters
- Banks
- Donor Agencies
Planning textbook development for primary education in Africa

1. The responsibility of the department of education and government

The State is responsible for guaranteeing minimal acceptable school conditions, and in particular access to textbooks and for promoting equity, so as neither to wrong minorities nor favour children of wealthy families to the detriment of pupils most disadvantaged in economic, social and cultural terms.

This fundamental responsibility by no means requires that the State should take everything in hand, but its intervention is an inverse ratio of the development of a local publishing industry. The more the local publishing industry is developed, the less the intervention of the State is necessary. In industrialized countries, public authorities are only providing per capita grants for textbooks. But given the critical situation prevailing in most developing countries as regards textbooks State intervention is still necessary.

Government intervention is necessary because MOEs cannot simply work on their own in developing effective policies in this area. Textbook development is a complex process involving many ministerial departments: Culture, Trade, Industry, Finance and Agriculture besides that of Education. But the MOE has a main role in this field and has to seek co-operation of the other services involved, as its particular concern is to ensure the implementation of the State’s policy concerning education and minimum basic education for all.

Responsibilities of the MOE which cannot be delegated lie in the area of curriculum and of standards set out for education. These are ordinarily expressed through a control over the examination system. The Ministry also has clearly the responsibility for staff development and teacher training.

It is also the role of the MOE to ensure the necessary budgetary allocations and to convince the Minister of Finance of the cost-effectiveness of textbook provision. In order to do this, the MOE must be prepared, hence the role of planning units.

Some countries have established a textbook co-ordination committee with an overall co-ordinating and monitoring function. In Mozambique a school book provision committee has been set up under the Vice Minister of Education to oversee and ensure that development, production and distribution of textbooks is done according to planned schedules. All partners concerned with textbook development are represented at this committee which meets at regular intervals. There is a need to further develop such co-ordination mechanisms with three main orientations (or sub-committees): education, management and finance, and intersectoral co-ordination.

2. The specific role of educational planning

In general terms planning has a role of co-ordination, monitoring and forecasting. The planner should in no way be involved in the actual process of textbook development, production and distribution.

The planner’s action is situated downstream of decisions and directions pertaining to political authorities such as language policies, social policy, industrial and commercial
policy etc. Where it is necessary to take relevant decisions of a general nature, for instance legislation concerning intellectual property and copyright, it is up to planners to seek to have such decisions specified and to have them taken.

The planner's action is also situated upstream of a series of operations and tasks which are the responsibility of various professionals in the area of education, publishing, printing and distribution. When necessary the planner has to ensure monitoring and the co-ordination of the various stages of implementation.

The planner has specific responsibilities in the following areas:

(i) Specifying aims: setting priorities concerning subject matters and establishing standards: number of titles per grade, target book to student ratios, book life assumptions etc. as bases of costing decisions. Standards cannot be established in a vacuum; they have to take into account the budgetary constraints, the training of teachers and prevailing teaching methodologies, the role of the textbook in relation to other media such as radio or television etc.

(ii) Identifying needs: it is his/her role to obtain satisfactory information concerning the availability and the use of textbooks at the classroom level. This information is needed to adjust the forecasts to the actual situation. To this end the planner can use the annual statistical survey, process inspection reports or launch specific surveys and promote research and evaluation as to the relevance and efficacy of textbooks. Information is the first step in decision-making.

(iii) Deciding on financing mechanisms and securing adequate budgetary allocations: this implies cost estimation and programming, phasing textbook development with financial constraints as well as deciding on cost recovery mechanisms. This can result in cost reduction strategies through revision of priorities and standards (priority to core subjects, shorter textbooks), in phasing over a longer period of time, etc. or in deciding on special measures to support the disadvantaged groups, etc. It is obvious that decisions of this kind pertain to the central level and not to professionals in education or publishing.

(iv) Ensuring intersectoral and donor aid co-ordination.

(v) Auditing the various stages and helping to define corrective measures whenever necessary in the different areas concerned such as curriculum, teacher training, equipment and raw materials requirements, foreign exchange allotments and accounting systems. Distribution is a special area which deserves all the attention of the planner.

(vi) Research and development: looking into future developments and promoting evaluation, research and innovation (introducing modern techniques in management, experimenting with innovative distribution methods, etc.).

Often the planner will have to settle conflicts which could arise from the opposite interests between finance and education, authoring and publishing, centre and periphery, etc.
Finally planning must ensure overall consistency and co-ordination of all protagonists involved to achieve general mobilization in favour of the textbook and the book in general.

In order to be able to perform these different tasks, planners will have to be trained. Textbooks can only be brought into the level of school policy choices if planning officials speak the same language as experts and acquire an overall understanding of the whole textbook provision process. One of the main conclusions of all groups was to ask IIIEP and other donor agencies to raise the awareness of decision makers, and to support national planning bodies with decentralized training activities, such as the Maputo seminar, intended for planners and administrators.

3. **Towards a minimum national textbook policy**

There is no simple blueprint for the development of textbooks across the countries, but we have identified key elements of a development policy in this area. In the framework of a long-term, comprehensive strategy, a national textbook policy should encompass the following activities:

(i) establishing the role and responsibilities of the government

(ii) identifying needs and priorities;

(iii) setting standards;

(iv) deciding on adequate financing mechanisms;

(v) encouraging authorship by allowing reward;

(vi) supporting the development of a national (public or private) book publishing industry;

(vii) fostering workable distribution systems;

(viii) securing training facilities in critical areas; and

(ix) integrating the use of textbooks into teachers' in-service and pre-service training.
Chapter VI

Further recommended actions

As a result of the work of the seminar several courses of action should be considered.

1. **Reviewing actual systems.**

   In each of the participating countries a careful review of the actual textbook provision should be made with a view to short-term improvements and defining a long-term strategy.

2. **Training**

   Both at national and subregional levels there is a need to develop technical and managerial skills for key personnel in textbook provision:

   (i) educational planners;
   (ii) graphic designers, editors, printers, publishers, etc.;
   (iii) teacher trainers and supervisors;
   (iv) authors.

   The IIEP was especially asked to take care of the training of educational planners, but it was felt that the publishing industry in Northern countries should have special responsibilities in the development of national technical capacities.

   The participants were informed that IIEP is preparing a set of modules to raise the awareness of decision makers and educational planners in the area of textbooks. The provisional titles of the modules are as follows:

   1. General issues.
   2. Book sector study.
   3. Quantification of needs.
   5. Financing strategies.
   6. Distribution and access.
   7. Management of publishing.
   8. Desktop publishing (DTP).
   9. Quality control mechanisms.
   12. Planner’s control chart.
3. Evaluation and research

It was felt that surveys on the availability and use of textbooks should be developed, and assessment studies undertaken on the efficacy of the actual books.

The benefits and the implications of DTP in African countries should be studied, and a seminar organized to share the results.

It was also recommended to study the legal and administrative aspects involved in public/private partnerships and North-South technical co-operation.

4. Development of subregional co-operation

Bilateral and multilateral agencies should assist in promoting subregional co-operation programmes in the following areas:

(i) common African languages;
(ii) co-development and co-publishing for small countries; and
(iii) regional training centres in graphic design.
Part II

Selected papers presented at the Seminar
Access by pupils and teachers to instructional materials, and particularly to textbooks, is a current problem which arises in acute form in developing countries.

A. The need to take textbooks into account at the central planning level

1. The provision of textbooks in developing countries follows a number of successive stages:

   • The large-scale import of existing textbooks.

   • The national or subregional adaptation of imported textbooks, such adaptations being published by multi national companies established in the countries concerned (in the case of English-speaking countries) or not (in the case of French-speaking countries).

   • National production, often undertaken by the public education system.

   • The quest for systems matched to each national situation, having recourse to a variety of national institutional bodies (not confined solely to ministerial departments responsible for education) and to national and foreign public and private bodies.

   In the light of accumulated experience (Valérien, J.V. 1989), it can be said that nowadays we know how to publish and produce textbooks and instructional materials corresponding to specific national requirements.

2. But the identification of the problems encountered and of the difficulties to be averted does not suffice to provide valid ways and means of meeting needs in the long-term; nor does the transfer of publishing technologies. A number of developing countries still suffer from a shortage (or even an almost complete lack) of school textbooks.

   The fact is that securing access to textbooks is a sensitive area, involving interests that extend beyond the strict confines of education and the teaching/learning process. Even within that limited field, where the use of textbooks to improve the quality of teaching is clearly demonstrable and recognized, numerous problems arise: writing, production, distribution, utilization, etc. For example, does one really know various forms of instruction are put over by the textbooks in question?

---

2This note was prepared by the IIIEP for the seminar on "The development of school textbooks and teaching materials" held at IIIEP from 27-30 November 1990.
In industrialized countries there is a regulating factor resulting from the interplay that exists between the numerous protagonists involved (the public authorities and education regulations, publishers, associations of various kinds (specialized associations, associations of teachers by level or by subject, parents' associations, etc.) which is usually not the case in developing countries.

Thus, securing access to textbooks is still considered, from the point of view of general planning, as a side issue (by comparison, for example, with school mapping) and as such is left to the initiative of the instructional directorates of the Ministry of Education (which may or may not have a specialized institution or structure) or to the initiative of the private sector.

3. The shortage of textbooks, the lack of control over access to them, and in many cases over-dependence on non-national sources, all justify the recognition of the need to take textbooks and instructional materials into account at the highest level of planning, i.e. how to secure that textbooks are called in question again at the first budgetary constraint.

It is not a question of determining how to produce the best possible textbook and put it to use; that can easily be done by a publishing institute. The planner must come into the picture upstream in order to be able to propose a choice among several alternatives and make allowances for, and settle, conflicts and divergences; the interests of educators, technicians and sources of funding are a priori different; how is it possible to arbitrate, and to do so what criteria should be adopted?

How can a 'project' become a 'programme', so as to ensure generalization and sustainability? Too often, projects come into being, develop and fade away without continuity being assured, because they are not integrated in the overall framework of general educational planning nor in an overall development strategy.

Such a recognition of access to textbooks at the central planning level assumes that the planner is familiar with the interrelations between problems and decisions in different areas. Each problem encountered has repercussions on others, and a decision taken at the end of the line may have important repercussions all the way up the line.

The planner must therefore be able to take all the factors involved into account in order to make a choice among the different possible options, arbitrate among divergent interests and conflicts, and ensure continuity by proposing an appropriate development strategy so as to make a project into a programme.

Consequently the planner's training must include systems analysis components placing emphasis on the interrelations and implications of access to textbooks.

In what follows we propose a conceptual framework for a general problem situation.
B. Conceptual framework for a general problem situation

1. Such a problem situation will necessarily take into account:

   • **Demand:** the existing demand; enumeration and analysis of requirements; identification of payers (at different levels and for different types of education and training).
   • **Supply:** enumeration and analysis of different sources of supply and of distribution circuits (with an examination of their relevance to demand).
   • **Access:** how to secure equal access to textbooks in both urban and remote rural areas.
   • **Decision-making processes:** i.e. the analysis of the different channels of decision-making (pedagogic, administrative, technical, commercial, etc.) and their interactions.
   • **Regulatory mechanisms** which can help to improve the quality of materials and to reduce costs so as to obtain the best value for expenditure incurred.

2. Four major functions can be identified:

   • **Design:** priorities, decision, manuscript, layout, possibly preliminary trial, use, etc.
   • **Production:** production proper and/or any other form of supply.
   • **Distribution:** storage, routing, form of acquisition, etc.
   • **Utilization:** handing over to and/or training of teachers, teaching guides, involvement of senior staff such as school principals and inspectors, quantitative evaluation, etc.

3. Each of these major functions has implications in numerous areas:

   • technical;
   • economic and financial;
   • teaching and learning; and
   • administrative.

They also have implications in planning and training (fields in which they may be described as transverse in relation to the four cited above).

4. Central planning is necessarily integrated, and textbooks must not be considered as isolated materials.

   First, the textbook is a component of a much larger category of materials: books in general. Specialists and experts unanimously agree that the publication of conventional school textbooks constitutes the indispensable substructure on which it is subsequently possible to progressively establish a *national book publishing policy*, a veritable component of the national identity. What are literates going to be able to read when they have advanced
beyond the textbook stage, unless they have access to nationally-published books? (This aspect is often overlooked when setting up book production or publishing structures within the education system, which explains why some projects which are too confined or protected within that system have come to nothing without making it possible to create a national publishing sector, which is often the only way of enabling young people to continue reading in their own language after they have left school.)

Second, school textbooks, while being the most cost-effective medium in the short term by comparison with all other strategies designed to raise the standard of education, form part of a wider spectrum of instructional materials and media. The cohesion of these materials one with another (in direct relationship with the curriculum), and their complementarity (should textbooks or other kinds of instructional materials take precedence in science teaching?) are the best guarantees of the effective implementation of any educational technology.

5. Such a conceptual framework, which is summed up in the table below, is applicable at all levels:

- literacy training;
- basic education;
- secondary education;
- technical education and occupational training;
- training of personnel; and
- higher education.

The last three lend themselves particularly to regional and international co-operation.

<table>
<thead>
<tr>
<th>Conceptual framework</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Four sub-systems</strong></td>
</tr>
<tr>
<td>The school textbook is an essential component of book publishing industry</td>
</tr>
<tr>
<td>- design</td>
</tr>
<tr>
<td>- production</td>
</tr>
<tr>
<td>- distribution</td>
</tr>
<tr>
<td>- utilization</td>
</tr>
<tr>
<td>The school textbook is one of the components (and the most cost-effective one) of instructional materials and media in general</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Six areas</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical</td>
</tr>
<tr>
<td>Economic and financial</td>
</tr>
<tr>
<td>Teaching and learning</td>
</tr>
<tr>
<td>Training</td>
</tr>
<tr>
<td>Administrative</td>
</tr>
</tbody>
</table>

34
Taking these subsystems and areas into account at different levels should enable us to arrive at the principles to be adopted for a sound rationalization of the processes and mechanisms and a better co-ordination of responsibilities among the different partners involved (and notably the apportionment of responsibilities between the public authorities and the private sector) so as to take due account of the degree of centralization and manage human resources more efficiently. This last point is often neglected; the management of personnel assigned to specialized institutions makes no allowance for certain specific features. It is not a foregone conclusion that a person will remain a curriculum development specialist or a salaried textbook writer throughout his or her professional life, especially when such activities are combined with day-to-day teaching work to an increasing extent. So it is often necessary for the development or survival of specialized institutions to distinguish between occasional and permanent functions, suitably adapt recruitment and posting arrangements, and provide training for reconversion so as to improve career prospects.

6. The planner must be particularly aware of the importance of the analysis of the interactions between sub-systems and areas, in order to be able to propose any necessary arbitration. To take a very simple example: should the use of textbooks be allowed at home, outside school hours? This is a pedagogic problem which is not without technical repercussions (the covers and binding must be stronger) and which has its financial aspects (a stronger book with a shorter life is necessarily more expensive).
Textbook provision from a donor perspective:  
the experience of the  
Swedish International Development Authority  

by  
Ingemar Gustafsson, Head of the Education Division  
Swedish International Development Authority (SIDA)  

This important seminar takes place almost two years after the Jomtien Conference that reaffirmed the commitment of governments and non-governmental organizations towards education for all. Needless to say, this is a far-reaching and bold goal for many countries. It is particularly true for those that are in a difficult transition process that affects their social and economic structure including the role and structure of the State. How countries organize the provision of textbooks has to be seen within this wider social and economic context.

A recent seminar in Manchester at which 35 African Ministers and an equal number of donors came together illustrated this very clearly. The background material and the discussions showed that textbook provision has to be understood and analyzed in a systematic way. It has pedagogical, economic and cultural aspects and it includes many actors.

This important seminar here in Maputo can be seen as a follow-up. It is my hope that it will give us some of the tools that we, as policy makers, planners and donor agencies, need in order to realize the goals that were set at Jomtien. It is important because, whatever has been said over the years about the potential of the radio and other mass media for education, it is still true that the teacher and the textbook are the corner-stones of education.

For many years, Swedish assistance to education in countries in Africa and Asia has had a focus on basic education. Support to provision of textbooks has been a key element in such programmes of assistance. We have had discussions with many of you over the years about the problems that are associated with those programmes.

We have learnt some lessons together, which I would like to share with you today. One is that planning for textbook provision is a complex process. It is important to look at all stages of the process and to analyse the context. This is to say that problems that may look the same have to find their own solutions depending on the context. It seems to be generally true, however, that most countries are at a stage of redefinition of the role of the Ministry of Education in relation to provision of textbooks. Whilst in the past the Ministry of Education has tended to be involved in the whole process of curriculum development, writing of manuscripts, editing, printing and distribution, there is now a tendency to rely more on the so-called market mechanisms for publishing and distribution. But this has led to other problems. There is a need to redefine the role of the Ministry of Education, or to put it in general terms, the relationship between the State and the market. But what is the market?
The market consists of those people, be they students, parents, headmasters or district administrators, who can pay for the books that are being produced. If, as is often the case, they are without money, there will be no market, and the books will never reach the students and pupils for whom they were intended.

Within a context of education for all, SIDA will try to create conditions for an equal provision of textbooks for all children. In Mozambique, for example, where there is little of non-existing purchasing power in the many rural areas, a subsidy system has been introduced. The role of SIDA will be to help the Ministry of Education to meet the costs of these subsidies. Unlike in the past, SIDA will not get involved in the actual production of textbooks. It is important to note then, that this conclusion is the result of a thorough analysis made by the Ministry of Education assisted by Swedish consultants. This analysis has included all the stages of the process and a discussion about the role of the State.

Another lesson learnt is that textbooks ought to reflect the culture of each country. The cultural and political dimensions of curriculum development and textbook development have to be respected. Therefore it is important for each country to have some control over and capacity to produce its own textbooks particularly. How a cost-effective national capacity can be maintained in a context of increasing international competition is a problem that each country will have to face.

In my introduction I referred to the Plan of Action that was adopted at Jomtien. It was about education for all: children and adults. Textbooks for children are important. But if we, as adults, have nothing to read, we will lose what we once learnt at school. When we discuss provision of textbooks we also ought to talk about the creation of a literate environment, where both children and adults learn from books but where we also read because we enjoy to read, be it newspapers, novels or textbooks. To create a literate environment; that is the real challenge. Only then can we hope to realize the goals of Jomtien: Education for All.
For the following discussions, we have found it appropriate to include a brief description of the conceptual framework. Otherwise our experience is that various terms and expressions are misunderstood and misused, which leads to considerable confusion.

1. Background

When the art of printing was developed some 500 years ago, there were only writers and printers. The writer ordered his work to be printed and paid the printer himself. Very soon, however, publishing also emerged, as many writers were not familiar with or were able to perform many of the functions of a publisher, like design, financing, sales and distribution. Today publishing has therefore become an industry in itself of considerable national and international importance.

Like any other industry, the publishing industry has over the years developed working methods which safeguards its survival. These methods are a combination of the internal work in publishing companies, trade rules and laws. Even if there are variations due to different legal and economic infrastructure in different countries, the methods on the whole are similar. This seems to indicate that this structure is the most efficient one, and that it is difficult to deviate substantially from it without increasing the cost.

In the African environment these methods may partly seem irrelevant, but basically the same economic laws apply also here. Major deviations will therefore probably lead to higher costs. It therefore seems rational to try to use the experience that has been gained in other countries, not least because it also simplifies international co-operation.

2. Curricula and syllabi

In all countries the curricula and syllabi are written and approved by the government for the public school system. In principle the curriculum is an expression of the political aims for the education in the respective country.

Obviously it is essential that the school books should conform with the curricula in order to be acceptable to the teachers.

3. Publishing

Publishing is based on the concepts of copyright, publishing rights and other intellectual property. What this refers to is that by international agreement, the right to reproduce the works of an author is his/her property until 50 years after his/her death.
Nobody can reproduce his/her works without his explicit approval, which is then normally linked to a fee, the so-called royalty. This in a way makes sense, as authors would not be able to live from their writing, if anybody could reprint the book without paying the royalty. Most countries in the world have therefore agreed on this convention. Even many countries which have not signed the agreement follow its rules to a large extent. The main exceptions have been countries that do not recognize private property and some developing countries that do not protect the works of foreign authors.

The publishing functions: the various publishing functions are briefly described below. The description is mainly based on how the functions are performed by commercial publishers in Europe today. It should however be emphasized, that these functions always have to be performed by someone. If commercial publishers do not exist, somebody else, e.g. government or parastatal institutions, have to perform them.

The traditional way of creating a book is that an author takes the initiative and writes a manuscript. He then submits the manuscript to a publisher and asks if the publisher wants to publish it as a book.

If the publisher finds the book interesting and, more important, possible to sell in sufficient numbers at a reasonable price, it writes a contract with the author about the publishing.

Nowadays the methods have changed to the following:

(a) Market analysis

An educational publisher has a number of senior editors, usually former teachers, each one responsible for certain school subjects or for a certain level of the school system, who constantly keep in touch with pedagogical development trends and curriculum changes, take part in seminars on methodology, visit schools and listen to lessons, analyse new textbooks, monitor newspaper debates, etc.

The editor constantly monitors the sales figures of his/her own company's books and estimates those of the competitors. He/she also receives feedback from teachers via the company's sales department.

If the editor believes that there is a market for a new textbook or series of books, e.g. because existing books contain outdated methodology, he/she will study the possibilities of initiating a publishing project.

(b) Project concept

Based on interviews with teachers and subject specialists and in collaboration with the art director, the editor will try to visualize the new book; what type of methodology, what size, what type of illustrations, how many colours, how many pages. He will also check the availability of suitable writers.
(c) Sales forecasts and budget estimates

Based on information about the total number of students in the classes and the prices and estimated sales figures of the competitors, the editor will then calculate the economic feasibility of his project.

The calculation may be based on the following parameters:

1. Sales forecasts for year 1 to 3.
3. Size.
4. Number of pages.
5. Number of colours.
6. Number of colours on cover.
7. Type of binding.
8. Number of photos.
9. Number and size of drawings.
10. Authors’ royalty percentage.
11. Desired customer price or desired gross profit percentage on first and second edition.

This estimate will show if the project is feasible or not. Sometimes it will be necessary to change some parameters to reach an acceptable customer price/gross profit level.

As there are normally many publishers and it is necessary to keep customer prices competitive, publishers often have to accept very low gross profit percentages on the first editions which are burdened with all the fixed development costs. Future reprints have to compensate for this, but there is no guarantee that there will be another edition and all publishing by definition contains an element of risk.

An educational publisher who wants to cover his development costs with the first edition will find that he/she either will have to set a high and probably prohibitive customer price or print a very large first edition. A large edition means investing even more money in books which will take years to sell and of which some may never be sold.

Especially when embarking on a major project, e.g. a series of illustrated books which may signify a major investment, it is customary also to make a total investment calculation which shows the average gross profit for the entire life cycle of the series.

To be able to survive, a commercial publishing house must have an extensive ‘back-list’ i.e. books which have already been reprinted and with their higher gross profit levels are contributing to cover the development costs of new editions.

Publishing does not normally require investment in expensive equipment, but it requires substantial capital resources as money will be tied up in titles under development and books in stock. For example, the printers will have to be paid on delivery of an edition which may take years to sell.
Selected papers presented at the seminar

(d) Authors

From the above it is clear that the initiative for a new textbook today comes from the publishing house, rather than as previously from the author. The authors, normally one - three, are selected by the publishing house. The authors are often teachers who write in their spare time or take a few months of leave to write the book. They are almost never permanent employees of the publisher. The selection of the authors is of course most important, criteria are e.g. good reputation in teacher circles, profound knowledge of the subject, extensive own teaching experience, etc. Obviously previous experience of textbook writing is also important.

The authors are normally paid on a royalty basis, i.e. a certain percentage of the price of the book. For educational books the royalty is between 10 and 20 per cent calculated on the publisher’s net sales price. When the writers are working full time, they have to live while they are writing. The contract in such cases therefore often stipulates advance payments, which are deducted from the future royalties. Another method, especially when there is a monopoly situation, is a combination, e.g. the writers receive a fixed payment during the work with the book, combined with lower royalty payments in the future.

When the book is published, the author(s) will receive 1/3 of the total royalty of the first edition as a kind of guaranteed fee. The rest will be paid annually as the books are sold.

(e) Origination

The book is nowadays produced jointly in a team or a project group. Participators are the editor, the authors, layout staff, illustrators, photographers and production specialists. Basis for the work is a detailed synopsis of the book, which also normally has been created together. The book chapters and pages are then created in close co-operation. The advantages are obvious, e.g. the text is written in close contact with the illustrators, as a good illustration means that the text can be reduced.

(f) Technical production

A publishing house may, naturally, also have its own typesetting and printing facilities but this is not usually the case. Normally it is considered more economical to buy these services from external typesetting companies or printing houses.

The need for typesetting/printing services varies greatly from time to time and it would not be rational to keep staff who would not be occupied some of the time and still would not be able to cope when several books have to be produced at the same time.

Also, there are many printing houses, and the competition between them tends to keep typesetting and printing costs down and is also a guarantee that the job will be well done and ready on the agreed date. This is most important for the publisher’s costs, as deliveries of delayed books cause enormous complaints, extra costs for handling and freight, in addition to the bad reputation which may hurt sales in future years.
(g) **Sales**

Organisation of sales is different in different countries, depending e.g. on how the books are financed. For example, in Germany and Denmark, all textbooks are sold through bookshops to the pupils, whereas in Sweden the publishers sell to the local school authorities, that distribute the books free to the pupils.

(h) **Marketing**

Educational publishers advertise in magazines which teachers read. They also have travelling representatives who visit schools and inform them about new books, arrange exhibitions, etc.

(i) **Warehousing and distribution**

The publisher arranges warehousing for the books. This is an important function considering that textbook sales is a seasonal business. All bookshops, schools and pupils need their textbooks at the same time and the printers, even if they have large capacities, cannot of course produce the books in just a few weeks. Therefore many textbooks have to be produced months in advance and have to be stored awaiting distribution.

As the same publisher often has textbooks for several different subjects and levels, it is essential for costing that they can distribute as large shipments as possible to each school or bookshop. The sales representatives therefore try to get the customers to order all their requirements at the same time and sometimes special order quantity discounts are given.

(j) **Financing and risk**

One of the most important functions of publishers is the financing of the whole book operations. During the development of the book, the publishers pay their own staff, but also advance the author money towards its future royalty. They then have to pay the printing plants, normally before a single book has ever been sold, and carry the books on stock, sometimes for several years, before the first edition is sold out.

Finally, and maybe most important, it also has a large element of risk both from competition and if the curriculum is changed for some reason. The book may not find acceptance with the teachers as envisaged, and sales may be lower than forecast, maybe so low that the publishers cannot recover the original development costs. In spite of this they have to pay the authors their minimum royalty, the printers, etc.

4. **Alternatives to consider when defining a school book policy**

Irrespective of whether the government is operating the school book provision system directly or independent commercial operators are used, the government influence is considerable, as it is normally the main buyer of school books. For smooth operation of the system, it is therefore suitable that the government defines a common school book policy. The purpose of such a policy is on the one hand to make government decision-making consistent and easier for the concerned government officers at various levels, and on the
other hand to define the framework of the system for the commercial operators, which makes it possible to plan ahead and utilize the resources of the country efficiently.

It is essential that the policy is based on economic realities and a knowledge of the publishing functions, in order to correctly predict the consequences. Otherwise a decision taken in one part of the system may cause negative consequences in other parts or even be impossible to implement. Careful consideration of various alternatives has to be made, and as an example we give below some issues that have to be addressed, and that may be more relevant to the African situation than the European model described above:

(a) **Curriculum, number of subjects, syllabi.**
   Obviously exclusive government functions.

(b) **Writers.**
   Employed full-time writers or freelance writers, either working in their spare time or being employed during the writing only?

(c) **Approval**
   Shall the government be trusted to approve all manuscripts, perhaps even illustrations and layout, or can the publishers be trusted to create books themselves which satisfy the syllabi?

(d) **Number of titles**
   Should there be only one title per subject or should different publishers be allowed to develop different titles for the same subject?

(e) **Government involvement**
   Should the government be involved in the school-book sector as a commercial operator, negotiating for royalties, buying raw materials, selling books, operate machines, etc., or, should the government limit its role to supervision and financing, leaving operations to commercial companies?

(f) **Recuperation of development costs**
   If government (e.g. curriculum development) writes the books, should the cost be covered by budget allocations, or should the cost be recovered by royalty fees included in the book prices.

(g) **Donor gifts**
   How can donor gifts in kind, e.g. paper, printing plates, machinery, etc. be injected in the school book system without distorting the competitive situation?

(h) **Ownership of the book**
   Should the pupils own the the books or should the books be owned by the schools?
Planning textbook development for primary education in Africa

(i) *Sales*
Shall government buy the books centrally, or shall the schools/districts buy the books locally? In this case should each school/district negotiate prices or should government make central price agreements?

(j) *Public sales*
Shall it be possible for the individual parent to buy a book or shall only books provided by the State exist?

(k) *Distribution*
Shall the government handle the distribution to the schools, or shall distribution to schools and individuals be handled by publishers or others?

(l) *Book prices*
Shall book prices be fixed by the government, or be set by the publisher, e.g. in a competitive market? Should book prices be the same in the whole country or be different to compensate retailers for higher distribution costs in remote areas?

(m) *Subsidies*
Should book prices be subsidized, or should the consumer pay full price?

Obviously, it is a rather delicate matter to formulate a policy, so that it is sufficiently specified to provide guidance for the users, while remaining sufficiently general to allow flexibility and efficiency.
Appendices
Appendix I
Agenda

Tuesday 19 November

09.00 - 09.30 : Opening.
09.30 - 10.30 : Objectives and working methods.
11.00 - 12.30 : National presentations by participants.

14.30 - 16.30 : National presentations continued.
17.00 - 19.30 : Visit to Editora Escolar and DINAME.

Wednesday 20 November

08.30 - 10.00 : National presentations continued.
10.00 - 10.30 : SIDA co-operation policy and programmes in textbook development in the participating countries.
11.00 - 12.30 : Overall issues concerning policy and planning of textbook development. Discussion.

14.00 - 16.00 : Sight-seeing.
16.00 - 20.00 : Group work session.

Thursday 21 November

08.30 - 10.30 : Group work session.
11.00 - 12.30 : Plenary: exchanges between groups.
14.30 - 16.30 : Plenary: exchanges between groups.
17.00 - 18.00 : Group work session.

Friday 22 November

08.30 - 10.00 : Group work session.
10.30 - 12.30 : Presentation of group reports and discussion.
14.30 - 16.00 : Findings and concluding remarks.
16.30 - 17.00 : Closure.
Appendix II
List of participants

I. Participants
Mrs. Filomena Spencer
Coordenadora Da VPMD
(Unidade de Produção de Materiais Didacticos)
PREBA
Cape Verde

Mr. Kebede Friesenbet
Head of Educational Materials Production and Distribution Agency
ADDIS ABABA
Ethiopia

Mr. Tesfaye Dubale
Head of Institute of Curriculum Development and Research
ADDIS ABABA
Ethiopia

Mrs. Léontina Semedo Costa
Redactora Chefe
Editora Escolar
INDE
BISSAU
Guinea Bissau

Mr. Alvaro Pereira
Responsavel Pela Planifcação e Gestão de Materiais Didacticos
BISSAU
Guinea Bissau

Mrs. Alice Nabwera
Secretary-General
Jomo Kenyatta Foundation
NAIROBI
Kenya

Mr. A. Nhavoto
Vice-Minister of Education
Ministry of Education
MAPUTO
Mozambique

Mr. Damasio Mabuza
Director of Educational Planning
MAPUTO
Mozambique

Mr. André Chirindza
Director
DINAME
MAPUTO
Mozambique

Mr. Alberto da Barca
Director
EDITORA ESCOLAR
MAPUTO
Mozambique

Mr. B. Wentworth
Deputy Minister of Education and Culture
Ministry of Education and Culture
WINDHOEK
Namibia

Mr. T. Erkana
Chief, Education, Language Research and Development
WINDHOEK
Namibia

Ms. S. Tyeku-Jolobe
Representative
ANC Education Department
JOHANNESBURG
South Africa

Mr. B. S. Mchomvu
Deputy Principal Secretary
Office of the Prime Minister and First Vice-President
(Regional Administration and Local Government)
DAR-ES-SALAAM
Tanzania
Planning textbook development for primary education in Africa

Mr. H.K. Mwenisongole
Director of Planning
Ministry of Education and Culture
DAR-ES-SALAAM
Tanzania

Mr. F.K. Chelu
Chief Inspector of Schools
Ministry of General Education, Youth and Sports
LUSAKA
Zambia

Mr. S.L. Hakalima
Director
Education Materials Unit
LUSAKA
Zambia

Mr. M.I. Sibanda
Permanent Secretary
Ministry of Education and Culture
HARARE
Zimbabwe

Mr. S. Chinodya
Education Officer
Curriculum Development
HARARE
Zimbabwe

III. UNESCO

Mr. Jan Visser
Director
UNESCO HARARE Office for Southern Africa and UNESCO Representative
HARARE
Zimbabwe

IV. Faculty

Mr. Habib Hajjar
IIIEP Programme Specialist

Mr. Etienne Brunswic
IIIEP Consultant

Mr. Göran Andersson
SIDA Consultant

Mr. Peter Stoye
SIDA Consultant
V. Composition of the Working Groups

<table>
<thead>
<tr>
<th>Working Group 1</th>
<th>Working Group 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mrs L. Semedo Costa, President</td>
<td>Mr. S.L. Hakalima, President</td>
</tr>
<tr>
<td>Mr. A Chivindza</td>
<td>Mr. A. Nhavoto</td>
</tr>
<tr>
<td>Mr. K. Friesenbet</td>
<td>Mr. S. Tyeku-Jolobe, Rapporteur</td>
</tr>
<tr>
<td>Ms. S. Halvarsson</td>
<td>Mr. K. Wickmann</td>
</tr>
<tr>
<td>Mr. B. Hammarsrom</td>
<td></td>
</tr>
<tr>
<td>Mr. D. Mabuza</td>
<td></td>
</tr>
<tr>
<td>Mr. A. Pereira</td>
<td></td>
</tr>
<tr>
<td>Mrs F. Spencer, Rapporteur</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Working Group 3</th>
<th>Working Group 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. F.K. Chelu, President</td>
<td>Mrs A. Nabwera, President</td>
</tr>
<tr>
<td>Mr. A. Da Barca</td>
<td>Mr. Tesfaye Dubale</td>
</tr>
<tr>
<td>Mr. S. Chinodya, Rapporteur</td>
<td>Mr. T. Erkana</td>
</tr>
<tr>
<td>Mr. H.K. Mwenisongole</td>
<td>Ms. M. Husen</td>
</tr>
<tr>
<td>Mr. B. Troedsson</td>
<td>Mr. M.I. Sibanda, Rapporteur</td>
</tr>
<tr>
<td>Mr. B. Wentworth</td>
<td></td>
</tr>
</tbody>
</table>
Appendix III
Speech by the Minister of Education, Maputo

Excellencies, Ladies and Gentlemen,

It is an honour for me to welcome the distinguished representatives of the International Institute for Educational Planning and the Swedish International Development Authority, delegates of governments and international agencies, and all of you attending this subregional seminar on planning textbook development for primary education in Africa.

I extend a special welcome to the delegates and guests from the countries of our continent, where the building of education is being tackled under difficult circumstances.

I wish to extend thanks to the organizers and sponsors of this event, and most especially to the Swedish International Development Authority and to UNESCO’s International Institute for Educational Planning which have made our meeting possible.

On behalf of the Government of the Republic of Mozambique, I bid you all welcome and wish you a pleasant stay in our country.

It has commonly been held, in international discussions, that the education sector is extremely vulnerable to the political, social and economic changes in African countries over recent decades.

Yet is only in the past few years that education has reached the front pages of the newspapers, both here and abroad. For that reason, the crisis stemming from the deteriorating condition of education in our countries remained for a long time more or less unrecognized.

The end of the 1970s, in fact, saw the start of the collapse of education systems in Africa: the standard and efficiency of teaching dropped, teachers in rural areas ceased to be paid regularly, and real earnings fell; governments increasingly lacked the financial resources to meet education’s requirements.

At the same time, as statistics show, the education sector had experienced periods of marked expansion in the years that followed independence.

The difficulties in developing education stemmed from the worsening of economic, financial and political conditions, which hampered the allocation of resources needed for social provision, and notably for education.

Despite the substantial efforts devoted to ensuring that the right to basic education was a practical reality, and to training the human resources essential for the economic and social development of our countries, in the deteriorating circumstances I have described the sector hardest hit was primary education.
Appendix III

Adverse factors have placed the education system, at every level, under great pressure, leading to low enrolment rates, inefficiencies and ineffectiveness in the system, high drop-out rates and other unsatisfactory trends that have helped increase the illiteracy rate in our countries and Africa as a whole.

That accounts for the major emphasis being placed, in Mozambique and elsewhere, on eradicating illiteracy by the year 2000 and improving the quality of education at all levels.

Yet what are -- what continue to be -- the main failings of our education systems? What form do they take?

First and foremost, we are bound to note the prevalence of structural imbalances.

The socio-political context that has predominated since our countries' independence and the drive to democratize education, coupled with the inadequate response of the education systems, have led to a whole range of structural imbalances, among which we may single out:

(a) imbalances between supply and demand;
(b) asymmetry among regions;
(c) low standards of education;
(d) mismatches between the occupational profiles of courses and the requirements of socio-economic development;
(e) imbalance between expenditure and resources;
(f) distortions in the education pyramid;
(g) unequal opportunities for males and females;
(h) inadequate incentives to study;
(i) insufficient mastery of the language of instruction, be it English, French or Portuguese;
(j) low capability for education administration and management;
(k) insufficient funding to build facilities, buy equipment, pay teachers, maintain premises, etc.

Within this set of problems, school textbooks have a clear importance and function in improving the standard of education, and their provision has been a leading concern among educationists and the subject of considerable international discussion. To mention just one example, there was the Manchester seminar last October, bringing together African Education Ministers and education donors, where I was privileged to chair the panel dealing with regional co-operation on textbooks.

This seminar will be a valuable opportunity to review policy thinking on the publication, production and distribution of textbooks.

Exchange of experience in this area can be of great value in helping to avoid mistakes that others have fallen into and in encouraging the adoption of textbook policies that have proved their worth.
It is understandable that special attention should be paid to primary education; the general consensus is that this sector should receive the highest priority since it is the one that tackles illiteracy, gives access to high-quality subsequent education, and ensures the development of a broader-based labour force.

There is no question, of course, of giving primary education top priority and simply disregarding the other levels. On the contrary, it has to be stressed that there are clear and obvious two-way links between the levels, from primary right through to higher education.

In turn, these links exert considerable influence on the standard of education, and hence on economic, social and cultural development in our countries.

Where textbooks and manuals are concerned, we in Mozambique are at present running a project to evaluate the curriculum and teaching materials, co-ordinated by INDE and with support and funding from SIDA. The evaluation is due to be completed next year.

In 1989 the government established a fund to assist the poorest groups in our population. It is quite clear that the high cost of basic educational materials, or the lack of them, together with the low purchasing power of many families and the low wages paid to teachers which fail to guarantee them the minimum they need for their work, significantly affect progress towards the fundamental objectives of improving the standard of education. Through its educational and social impact, providing textbooks is undoubtedly one of the major steps in the lengthy process of improving standards.

A number of measures are under way, including the textbook programme, a complex operation involving textbook publishing, design and distribution units that you will have an opportunity to visit.

Measures are also in hand to democratize access to books as a vector of culture, providing a fairer dissemination of knowledge as an essential foundation for progress. The prime objective is to inculcate the habit -- and enjoyment -- of reading among pupils, by furnishing schools with the material means to promote this.

We hope that this step will also have a positive impact on the teachers, since it will encourage them to tackle reading in schools more creatively, trying to produce readers who will see reading not as a chore but as a pleasure.

The rapid growth of the school-age population in our countries has not been accompanied by a matching increase in infrastructures and capacity for producing and distributing educational materials. It is for that reason that we are looking to the international community for greater support to bolster the efforts we ourselves are making.

I should like to emphasize the important role being played by international co-operation, and by SIDA in particular, in the textbook work I have just mentioned and in the education sector more generally. I must again single out its contribution in arranging and sponsoring this seminar.
It is a fact that, without international co-operation, many of our education programmes would hardly be possible, certainly on the scale that we envisage.

We accordingly need to develop measures that will help make the most effective use of the resources and opportunities that international co-operation offers.

Thank you for your attention. I now declare open the Sub-regional Seminar on Planning Textbook Development for Primary Education in Africa.

Maputo, 19 November 1991
Appendix IV
List of country papers

1. School textbooks for primary education in Angola
   by J.R. Santos Paula and Menga Thomas.

2. Planning textbook development for primary education in Ethiopia
   by K. Friesenbet and K. Dubale

3. Primary school textbooks in Guinea Bissau
   by Mrs. L. Semedo Costa and A. Pereira.

4. School textbooks for primary education in Kenya
   by Mrs. A. Nabwera.

5. Production and distribution of textbooks for primary level in Mozambique
   by A. Nhavoto, A. Chirindza and A. da Barca.

6. Textbooks for primary education in Namibia
   by Dr. J. Alberts, W. Steenkamp and Dr. P. Verhoeff.

7. Textbook development for primary level of education in Tanzania
   by B.S. Mchomnvu.

8. Development of school textbooks in Zambia

9. Textbook producing in Zimbabwe
   by M. Sibanda.
Selected Bibliography


Valérien, J. 1989. *Planning and management of school textbooks and teaching materials: the state of the Art* (only available in French). IIEP.
IIEP publications and documents

More than 650 titles on all aspects of educational planning have been published by the International Institute for Educational Planning. A comprehensive catalogue, giving details of their availability, includes research reports, case studies, seminar documents, training materials, occasional papers and reference books in the following subject categories:

*Economics of education, costs and financing.*

*Manpower and employment.*

*Demographic studies.*

*The location of schools (school map) and sub-national planning.*

*Administration and management.*

*Curriculum development and evaluation.*

*Educational technology.*

*Primary, secondary and higher education.*

*Vocational and technical education.*

*Non-formal, out-of-school, adult and rural education.*

Copies of the catalogue may be obtained from the IIEP on request.
The International Institute for Educational Planning

The International Institute for Educational Planning (IIEP) is an international centre for advanced training and research in the field of educational planning. It was established by UNESCO in 1963 and is financed by UNESCO and by voluntary contributions from Member States. In recent years the following Member States have provided voluntary contributions to the Institute: Belgium, Canada, Denmark, Finland, Iceland, India, Ireland, Norway, Sweden, Switzerland and Venezuela.

The Institute's aim is to contribute to the development of education throughout the world, by expanding both knowledge and the supply of competent professionals in the field of educational planning. In this endeavour the Institute co-operates with interested training and research organizations in Member States. The Governing Board of the IIEP, which approves the Institute's programme and budget, consists of eight elected members and four members designated by the United Nations Organization and certain of its specialized agencies and institutes.

Chairman:
Victor L. Urquidi, (Mexico) Research Professor Emeritus, El Colegio de México, Mexico.

Designated Members:
Alfredo H. Costa Filho, Director-General, Latin American and Caribbean Institute for Economic and Social Planning, Santiago.
Goran Ohlin, Assistant Secretary-General, Office for Development, Research and Policy Analysis, Department of International Economic and Social Affairs, United Nations.
Visvanathan Rajagopalan, Vice President, Sector Policy and Research, Policy, Planning and Research, The World Bank.
Allan F. Salt, Director, Training Department, International Labour Office.

Elected Members:
Isao Amagi (Japan), Special Advisor to the Minister of Education, Science and Culture, Ministry of Education, Science and Culture, Tokyo.
Henri Bartoli (France), Professor, University of Paris I, Panthéon-Sorbonne. Paris.
Mohamed Dowidar (Egypt), Professor and President of the Department of Economics, Law Faculty, University of Alexandria.
Kabiru Kinyanjui (Kenya), Senior Programme Officer, Social Sciences Division, International Development Research Centre, Nairobi.
Yolanda M. Rojas (Costa Rica), Academic Vice-Rector, Faculty of Education, University of Costa Rica, San José, Costa Rica.
Lennart Wohlgemuth (Sweden), Assistant Director-General, Swedish International Development Authority, Stockholm.

Inquiries about the Institute should be addressed to:
The Office of the Director, International Institute for Educational Planning, 7-9 rue Eugène-Delacroix, 75116 Paris