



EdData II

Research on Reading in Morocco: Analysis of Textbook Procurement Chain and Market for Supplemental Reading Materials

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Executive Summary

Morocco currently has an established system for development and distribution of textbooks designed by the private sector (publishers and distributors) according to the policies and procedures outlined in several different documents, including the National Charter, the textbook specifications of the Ministry of Education and Professional Training (*Ministère de l'Éducation et de la Formation Professionnelle* [Ministry of Education]) and procurement regulations from the Moroccan Agency for Social Support (*Agence Marocaine d'Appui Social* [AMAS]). This process has been successful in ensuring access to Arabic language textbooks in schools, with no costs required from families. This system works effectively and is aligned with the budget allocated by the state. However, it is important to recall certain findings from previous studies,¹ which are related to the quality and relevance of these textbooks:

- The existing Arabic reading textbooks do not reflect international research and best practices for reading acquisition in alphabetic languages.
- The level of Arabic used (in terms of word length, repetition, complexity) is well above the level of beginner readers in the early grades, given the diversity of language skills and prior learning levels.
- Textbook content is not differentiated according to children's actual ability, particularly whether they attended preschool or not; not all textbooks are accompanied by a workbook.
- Books fail to provide a structured, sequenced approach to the development of basic reading skills across the early grades of primary school.
- There is little emphasis on direct and explicit instruction of the basic components of reading: letters, letter sounds, phonemic awareness, vocabulary, decoding, word roots or morphology, strengthening fluency, and comprehension strategies.
- Textbook specifications place more emphasis on thematic content and learning objectives dealing with higher-order thinking skills (such as scientific reasoning or creativity) than on basic concepts of reading.

What decades of research have shown is that children learn to read according to a specific sequence—building foundational skills like oral language development, alphabetic principle and phonemic awareness before learning to decode unfamiliar words, building greater vocabulary, and developing reading fluency. Textbooks for teaching reading in Arabic should follow this sequence both within and across grades (especially the first three grades when children are consolidating their reading skills) so that children can build, practice, and continually deepen skill as they progress through school. This reading fluency, once acquired, will serve the ultimate goal, which is reading comprehension.

The textbooks for reading in Arabic should have one goal, which is to teach children to read. A fast and strong start in learning to read will pay off in the long term by allowing children to

¹ Research on Reading in Morocco studies prepared for the U.S. Agency for International Development by RTI International in 2014. See subsequent footnotes for details.

apply their reading skills to the study of thematic topics in textbooks specifically designed for this purpose.

At the most basic level, national book provision policy should guarantee barrier-free, equitable access to high-quality, evidence-based, and cost-effective textbooks for students (and corresponding teaching guides for teachers). The supply and demand of textbooks should be sustainable in the long-term and flexible enough to accommodate innovation in content and methods.

When considering policy related to the book chain, a priority for the Ministry of Education therefore should be assuring that the content of textbooks and teachers' guides reflects research-driven best practice and adheres to the appropriate sequence of skill development. Currently, the market for Arabic reading books fails to respond to this priority, primarily because

- the content of the books has not evolved for over 10 years;
- the content is not piloted or evaluated in the actual context of its use before or after its adoption at scale;
- specifications for textbook content in terms of basic skills instruction (knowledge of letters and morphemes, word recognition, reading fluency) are not sufficiently developed (although a number of improvements were integrated in the revision of the specifications in 2010 and 2011, these have not been implemented yet);
- the selection (approval) of bids is done without making public the basis for the decisions and without constructive feedback to publishers and authors that would enable them to improve production in the next iteration;
- no publisher produces a complete collection (for example for first to third grade) because at least one of each publishers' textbooks was rejected. A child can, therefore, be faced with three different publishers of books from Grade 1 to 3 rather than a complete sequence that represents a logical and progressive learning path;
- publishers and printers do not have incentives to make long-term investments in improving their capacity because the market is divided equally between publishers (regardless of the quality of the manual) and purchase contracts for reprints are attributed one year at a time ; and
- there is a large supply of learning materials that could support reading in Arabic, but there are few mechanisms to make sure these materials are available in public schools. There is neither a central structure in charge of nor funding for the creation of school libraries. Also, while there is considerable activity and attention to the development of digital resources for education, little of that attention is directed to developing e-resources that could support the teaching of reading in Arabic.

While still relying on collaboration with private-sector actors who have the capacity to edit, publish, and print books, and while still using the marketplace to assure distribution and some degree of freedom of choice within the education system, the Ministry could obtain dramatic improvements in the quality of the content of Arabic reading textbooks through some changes to the book chain. A revision of textbooks would integrate new elements of psycho-cognitive research on effective methods of learning to read in Arabic, and could lead to

production of textbooks in a set aligned to several grade levels. For this it is necessary to, for example,

- review the specifications and require publishers to offer books that meet the defined sequences (i.e., for Grades 1–3, 4–6, or both), and also to justify their approach (sequence, content, etc.) with respect to the evidence of what works in learning to read;
- involve printers in developing textbook specifications related to manufacturing to ensure that they reflect the best combination of requirements for durability, cost effectiveness, and functionality;
- ensure that publishers and printers have a future market based on purchasing contracts that last for several years, making it easier for them to invest in improving their capacity and quality of production;
- continue to provide a selection of textbooks for schools and delegations, but commit to evaluating how these books address the needs of different students. The choice of textbook should be made at the local level, authentically, with the participation of experienced primary teachers, rather than “artificially” with the main objective being ensuring an equitable distribution of the market among publishers;
- define the needs of the textbooks in terms of quality (contents of the set, estimated number of pages total, extra materials such as teachers’ guides and exercise books) and then determine the cost so that budget requests can reflect the needs of the program, rather than having the books altered to fit within a defined budget limit;
- commission studies to determine how different textbooks and non-school books meet the needs of children of different socio-linguistic, geographic, and academic backgrounds;
- short-list textbook bidders first using a simplified submission process that requires only a sample (chapter or several chapters, rather than a full print-ready book) that clearly demonstrates and justifies the approach, and allows for more interaction with authors and publishers;
- require textbooks, if reused year after year, to be accompanied by workbooks, which are currently used in the private sector but not allowed in public schools; and
- revise the Ministry of Education’s modest contribution to the *Operation One Million Schoolbags* upwards to at least cover the cost of materials and textbooks in public primary education. *Tayssir*, targeting at the household level, would free up fiscal space and ensure the sustainability of manuals funding, which relies too heavily on voluntary contributions from the private and broader public sectors.

This final report does not expect to make specific recommendations for the Government of Morocco, but only presents different choices (similar to those mentioned above) to be considered, with a discussion of the tradeoffs that may need to be confronted at each stage.

Four key considerations for the Ministry of Education, which are developed further in this report and its conclusions, follow:

1. **Who develops the books?** Here the choice is between a centralized, government-as-publisher model and a liberalized private-sector-as-publisher model. At present, Morocco’s publishing chain is the latter, with a large number of local publishing houses that develop textbooks across subject areas, as well as other media for the public (novels, children’s books, etc.). While government publishing can be cost effective, it is not recommended in a context where significant local capacity exists. In the liberalized case, each actor does what it does best: government focuses on policy and curriculum development while the private sector focuses on cost-effective production models. However, this model assumes that private providers know how to develop a good early grade reading book. At present, that is not evidently the case in Morocco, though it may be that the textbook specifications are preventing publishers from creating quality content for reading instruction because of their focus on thematic content and a whole-language pedagogy. The National Charter is clear that educational publishing should involve the private sector and benefit from competition. Therefore this may not be a consideration that the Ministry of Education is at liberty to change at all. However, this report proposes (See Scenario 2 in the conclusions and recommendations section) a compromise in which, for a short time, the Ministry develops and trials a reading instruction textbook internally, and then opens republishing to the private sector several years later when the general design and methodology have been proven. The key distinction is that the Ministry of Education develops a *reading textbook*; private publishers can continue to develop “Arabic language” textbooks such as those in circulation now, which focus on thematic content and provide opportunities to practice reading skills at different levels. In this way the Ministry is not suddenly excluding publishers from the market entirely, but instead supporting a general reform process from which they will ultimately benefit. By initially producing this internally, some costs can be reduced or controlled, while also building capacity of the Ministry to provide monitoring and oversight in the future.
2. **What minimum standards for textbooks should be applied?** The key consideration here is whether or not the Ministry of Education should promote several versions of a textbook or have one standard book for all students. Having a choice of textbooks is generally the preferred model (otherwise the government risks imposing an unproven, sub-standard product on all children, or applying a model that is inappropriate for certain sub-populations). However, a policy of textbook choice is only relevant if: a) the books are actually different (targeting different approaches, regions, or other specificities), and b) schools are actually allowed an authentic choice of the book they want to use. Currently, the books do not vary significantly—they all use the whole language approach, with only some differences in quality of stories and images. Moreover, schools do not have a true choice of textbooks because there is a requirement that all publishers receive an equal market share. Beyond the question of textbook choice, the minimum standards must determine what combination of materials each child should be expected to have. For example, a textbook and a workbook? One per child or shared? Reused or issued to the child (disposable) each year? This report presents pros and cons of different alternatives in Scenarios 1 and 3 of the conclusions

section, which both emphasize that allowing free choice may not be the easiest option, but it is the one that will ultimately result in the best quality for learners.

3. **What is the tradeoff between quality and price?** The model currently in place in Morocco is that the government imposes a price for the textbooks, and publishers must develop books within that price range. The actual *cost* of the book is somewhat elusive, however. Embedded in the current selling price of books are costs paid to distributors, printers, and authors (royalties) as well as the publishers' origination and overhead costs and profit margin. Because the books were originally commissioned for an unspecified period of time, we don't know how the publishers distributed their origination and overhead costs across the cost of the books. Additionally, the printing costs (paper, production) vary from year to year. Ultimately, however, we can see that it is possible to print color, bound textbooks for a price of about \$1 to \$1.50 per book. Print quality and cost-effectiveness could be improved by modifications to print specifications (size of paper, weight, printing standards, etc.) but ultimately the question of quality is more related to the content and the processes that go into developing content for reading instruction. Allowing publishers to compete on the basis of both quality and price should ultimately result in better quality and lower cost; however, this may take more time than Morocco's children can afford to wait. Furthermore, since textbook financing currently relies on contributions from development partners and even from the private sector, it is important to know year to year how much textbooks cost. Therefore it is expected that the Ministry of Education could successfully procure high-quality textbooks within the fixed price that they need by revising the textbook procurement processes to focus on content through a collaborative and iterative partnership with short-listed publishers. The pros and cons of this are developed in Scenario 4 of the conclusions section.
4. **What alternatives are there for cost-effective textbook distribution?** The current model relies on publishers, who distribute books to local booksellers (or other market stands), and then the schools buy the approved textbooks in the quantities ordered from those booksellers. This model seems to work well in Morocco and is deeply entrenched in local culture and supported by civic organizations and associations that acknowledge how important the sale of textbooks is to keeping many bookstores open. Thus far, the system seems to be functioning well, as judged by the fact that student-to-textbook ratios are very close to 1:1, and there are no major reports of delays in textbook delivery or otherwise insufficient supply. However, this comes at a cost of about 30% of the textbook price. This price may be well justified given the added value it provides to local economies. Other, centralized distribution methods that circumvent local booksellers and their margin could be considered (in fact, these methods are in use by the Ministry of Culture, which distributes supplementary materials directly), but this report did not elaborate on this since it seems like the current system functions well. It is hard to anticipate how this might change as new publishers enter the market, however.

Ultimately, any reforms made by the government must first consider the skills that children need to be taught grade by grade, and then be prepared to retrain teachers on these skills. This may require a curriculum review and revision that explicitly maps the scope and sequence for acquisition of literacy skills in Arabic, which will then form the basis for new textbook specifications.

1. Introduction

1.1 Context of the study

The Moroccan Constitution guarantees free speech and a constitutional right to edit and a right to publish. Article 25 of the 2011 constitution states: “Freedom of thought, opinion and expression are guaranteed in all forms. Freedom of creation, publication and expression in literary and artistic formats as well as scientific and technical research are guaranteed.”²

Morocco is a country with unique cultural and linguistic assets thanks to its historical influences and to its geographical position at the crossroads of sub-Saharan Africa, North Africa, and Europe and its proximity to the Middle East. Governed by a constitutional monarchy, pride in the Moroccan history and identity is apparent in many national policy frameworks. The education sector in particular is seen as a key mechanism for imparting love of country, civic participation, and Islamic values, while also recognizing that Moroccans are citizens of the world, and so promoting the study of foreign languages, science and technology, human rights, and sustainable development. The National Charter for Education and Training (*Charte Nationale de l'Éducation et de la Formation* [National Charter]), introduced in 2000, declared a “decade of education” with three objectives:

- Primary education for all and improved education in quality and performance
- Reformed educational system
- Modernized educational system

However, as the end of the decade approached, in 2009, the Government of Morocco was forced to put in place a national emergency program to attain the above objectives. This Emergency Program (*Programme d'Urgence*) extended the deadline for achievement of the objectives to 2012 and added one more objective: The eradication of illiteracy. By 2013, his Majesty, King Mohammed VI, himself spoke critically of the lack of progress in the education sector, in part due to changes in government and political agendas that undermine effective follow-through on the reform agenda. The Ministry of Education and Professional Training (*Ministère de l'Éducation et de la Formation Professionnelle* [Ministry of Education]) is now (in 2014–2015) revising its education strategy with the input of the Higher Council on Education (*Conseil Supérieur de l'Enseignement*) whose nominations, mandate and regulations were set recently. The Higher Council has been put in place to define and maintain strategic orientations in the education sector.

In addition to the emphasis placed on education by the National Charter, a new Constitution issued in 2011 gives new prerogatives to the Government of Morocco. There is also a general evolution towards more decentralization at the region (*Académie Régionale de l'Éducation et de la Formation*, [AREF]) and province-level (*délégation* [delegation]) of school administration. Although curriculum and policy are determined at the central level, implementation of education is largely led by the decentralized levels. For example, school directors do not have the mandate for pedagogical supervision; instead there is an inspectorate that is responsible for periodic review of instructional quality. Moroccan children start

² Author's translation from the French : “Sont garanties les libertés de pensée, d'opinion et d'expression sous toutes ses formes. Sont garanties les libertés de création, de publication et d'expression en matière littéraire et artistique et de recherche scientifique et technique”

primary education at the age of six. Primary school runs for six years, followed by three years of middle school until the age of 15. The standard Arabic (MSA³) is the official teaching language starting from the first grade. In Morocco, French is still used in public life, and is considered the mother tongue of some Moroccans. It is introduced from an early age as a teaching language in some preschools. The National Charter recommended access to education for all school-age children and delivery of quality educational services. It recognized the importance of beginning to teach reading skills as early as preschool:

[Preschool] aims to, over two years, facilitate physical, cognitive and emotional development of the child... [through]... activities to get started on learning reading and writing skills in Arabic, particularly through having good command of spoken Arabic, and relying on mother tongues. (Article 63)

The National Charter also mandated curriculum reform and a commitment to diversification through competition in development of textbooks and supporting materials (Articles 107 and 108).

Enrollment rates have been on the rise since 2008. *Exhibit 1*, below, presents estimated enrollment rates based on the national statistical yearbook.

Exhibit 1: Pupils by grade, type of school, and school location

Grade	Public		Private	Total
	Rural	Urban	Urban and Rural	
1	349,954	251,898	121,387	723,239
2	321,128	241,153	109,517	671,798
3	326,956	248,064	99,055	674,075
4	323,016	256,755	90,125	669,896
5	310,382	262,417	81,919	654,718
6	290,141	272,404	73,871	636,416
Total	1,921,577	1,532,691	575,874	4,030,142

Source: Ministry of Education Statistical Yearbook, 2013/2014

The Emergency Plan (*Programme d’Urgence*, 2009–2012), with a budget of approximately €4 billion was aimed at supporting enrollment in school and preventing dropout. Supported by development partners, the Emergency Plan had several components including Social Support:

- Subsidies for transport, boarding, and school lunch
- Conditional cash transfer program (*Tayssir*)
- The *One Million Schoolbags* program launched in 2008 (free delivery of school materials [textbooks, pencil, notebook, and bags] for Grade 1 primary school pupils in National Initiative for Human Development (*Initiative Nationale pour le Développement Humain* [INDH]) communes,⁴ based on poverty indicators.

See budget figures, *Exhibit 2*.

³ Throughout this report, the term “Arabic” may be understood to refer to MSA, whereas “Darija” is used when referring specifically to the variation of Arabic spoken in Morocco.

⁴ INDH has established a list of priority communes, based on poverty indicators.

Exhibit 2: Budget of social support to education (2014–2015)

Component	Cost in MAD (millions)	%
Conditional Cash Transfer (<i>Tayssir</i>)	778	36.8%
School transport	34	1.6%
Lunch and boarding	941	44.5%
1 million schoolbags	360	17.0%
Total	2113	100%

Source: <http://www.aujourdhui.ma>
MAD = Moroccan Dirhams (1MAD = .1 USD)

In 2009 *One Million Schoolbags* was extended to all public schools (decree N°95-25 June 2009) and then to all grades of rural middle schools. The first procurement of textbooks was funded by 22 operators such as the INDH, the Bank for Deposits and Management (*Caisse des Dépôts et de Gestion*), the Moroccan Phosphates Office (*Office Chérifien des Phosphates*), and the Mohammed VI Foundation for Community-based Education and Training Activities (*La Fondation Mohammed VI pour les Oeuvres Sociales de l'Education et de la Formation*). *Exhibits 3a* and *3b* present the supplies in the school bags and textbook prices, respectively.

Exhibit 3a: List of supplies in subsidized school bags by grade and location

	Unit price (MAD)	National level	Grade 2 – 6 Rural*					Lower secondary in rural areas		
			2	3	4	5	6	1	2	3
Schoolbag	70	Y		Y				Y		
Textbooks	(See 3b)	Y	Y	Y	Y	Y	Y	Y	Y	Y
Notebook 50 pgs	1.6	3	3	4	6					
Notebook 100 pgs	2.8					6	6	6	6	6
Notebook 200 pgs	5							4	4	4
Plastic cover	.5	3	3	4	6	6	6	10	10	10
Pens	1	4	4	4	4	4	4	4	4	4
Slate + eraser	5.5	1	1	1	1	1	1			

* Note: Urban areas received only textbooks.

Y = Yes, (included)

Source: Ministry of Education, Mise en oeuvre de l'initiative Royale " Million Cartables" pour la rentrée scolaire 2013/2014, Lettre N°3-2536, 17 May 2013 and Note du MENFP N° 95 Date: 25 May 2009, for unit costs

Exhibit 3b: Price of Arabic language textbook, by grade

Textbooks	Unit price in MAD
Grade 1	14.97
Grade 2	17.80
Grade 3	23.05
Grade 4	23.50
Grade 5	24.70
Grade 6	25.20
Grade 7 (rural only)	21.10
Grade 8 (rural only)	23.05
Grade 9 (rural only)	24.60

Source: Ministry of Education (2005), *Le livre scolaire : trajet d'une réforme*. [Textbooks: History of reform]

All textbooks are the same price for a given grade (within one dirham difference).

The budget is now MAD 360 million for *One Million Schoolbags* (2014) financed by the public and private sectors, as shown in *Exhibit 4*, below.

Exhibit 4: Sources of funding for One Million Schoolbags project

Source	Millions of Dirham	%
Ministry of the Interior	40	11.1%
Moroccan Office of Phosphates	15	4.2%
<i>Groupe AL Omrane</i>	7,5	2.1%
Mohammed VI Foundation	5	1.4%
Agricultural Bank	5	1.4%
Bank for Deposits and Management	5	1.4%
Ministry of Solidarity, Women, Family ,and Social Development	0,5	0.1%
Ministry of Education through Ministry of Finance	100	27.8%
Unknown	182	50.6%
Total	360	100.0%

Source: <http://www.aujourd'hui.ma>, and Authors, from interview with the budget department of the Ministry.

The national budget accounts for only 27.8% of the *One Million Schoolbags* program and thus there are problems of financial sustainability. Each year the Moroccan Agency for Social Support (*Agence Marocaine d'Appui Social* [AMAS]) has to negotiate for contributions. There has been little local participation in the process, and school directors are not trained to engage in fundraising. The program is only a financial mechanism and not a distribution mechanism for reaching schools, although it details how planning and distribution should be done.

While many studies highlight the success of reform efforts in Morocco in increasing access to education, learning outcomes have not improved, according to a range of international assessments such as Trends in International Mathematics and Science Study (TIMSS) and Progress in International Reading Literacy Study (PIRLS), as well as the 2011 U.S. Agency for International Development- (USAID-) funded Early Grade Reading Assessment (EGRA)

in the Doukala Abda region. The assessment showed that the factors that affect students' performance are multiple and complex:

- Lack of teacher training in reading instruction
- Lack of supplementary reading materials
- Lack of reading materials at home
- Lack of parental involvement
- A complex linguistic context, confounding instruction in the early years by using a language of instruction that is different from the language spoken in the home, while at the same time introducing other second languages (Tamazigh, for some, and French, for most).

1.2 About this study

Within this framework, in March 2014, USAID funded three major studies on reading to provide the Ministry of Education needed evidence for its reform strategy. The three studies covered the following three topics.⁵

1. Curriculum and Textbook Analysis: This study reviewed the official curriculum and a selection of primary school Arabic textbooks to determine whether they reflect international best practices in the teaching of Arabic, and whether they provide the framework for improving reading instruction in the early grades. The study looked at the gaps between the official curriculum and evidence-based practices in teaching Arabic reading.

The analysis revealed the need to improve the presentation and pedagogical quality of primary school textbooks. The study showed that certain key competencies in reading acquisition—for example, phonemic awareness, letter-sound identification and incremental decoding—were not addressed sufficiently in the textbooks before requiring children to do more complex tasks like reading phrases and understanding of texts. Monitoring of student learning focused mostly on recitation and oral comprehension skills, and much less on reading activities that require a significant linguistic and cognitive effort, such as decoding and free writing. Thematic content and complex higher-order learning objectives such as scientific reasoning and developing creativity took precedence over basic reading skills development in textbook design specifications and subsequent guidance documents. The researchers as well as teachers interviewed for the other studies (see below) concluded that the textbooks are written at a level far too difficult for the actual ability of the children, especially since many children have not benefitted from preschool, or if they did, the preschool curriculum was not aligned with the expectations of the primary school curriculum.

2. Pre-Service Teacher Education Analysis: The objective of this study was to look at how teachers in training learn to teach reading in the early grades. The key research questions revolved around whether reading is taught explicitly or implicitly in the teacher preparation curriculum, and whether the methods promoted in teacher training reflect best practices in the teaching of Arabic to early readers.

⁵ All studies, as well as associated data and summaries, are available in English, French, and Arabic at: <http://www.eddataglobal.org>

According to the study, several factors limit the effectiveness of pre-service teacher training in preparing teachers to teach Arabic reading in the early grades. The main factor is the limited amount of time required for teacher certification in the pre-service institutes (*Centres Régionales des Métiers de l'Éducation et de la Formation*, [CREMF]) (about 9 months). There is insufficient time dedicated to providing in-depth strategies for teaching a specific subject area like reading, alongside all of the other general professional knowledge and skills required by the curriculum (lesson planning, classroom management, etc.). The one-year program does provide a range of courses, but not to the depth that a full three- or four-year program would. This is compounded by the fact that teachers in training can come from undergraduate programs in any subject area, and therefore they do not always have pre-requisite content knowledge in the subject to be taught. Finally, the study found an emphasis on theoretical knowledge to the detriment of practical skills (“content knowledge” and “pedagogical content knowledge”); this gap needs to be addressed in order to better prepare teachers for their practice.

3. Teacher Attitudes, Beliefs, and Practices: This study examined the perceptions of teachers towards the teaching of reading in Arabic and the way these perceptions influence practice. The principal research questions were: What beliefs have the most influence on the teaching methods used in early reading lessons? How do these perceptions impact the professional growth of teachers? How do teachers react to questions related to language of instruction? Are they receptive to using local languages to support reading instruction in Arabic?

The analysis found that teachers express a relatively optimistic view of their motivation to teach in primary grades and to teach reading in Arabic. However, many factors make it difficult for them. First, they do not feel they have the resources, in general, to teach in crowded or multi-grade classrooms, regardless of pedagogical expertise. Next, there is no consensus on the best method to use for reading instruction; some teachers maintain the government’s recommended whole-language method, while others opt for a mixed or “syllabic” approach to teaching reading. Very few are aware of recent evidence of best practice in teaching reading in Arabic in the early grades (for example, use of morphology and a phonetic approach), but they do recognize that the current textbooks are not aligned with the ability of the children. Teachers find themselves adapting on their own to the sociolinguistic environment and to teaching materials that are too difficult for most students, and especially for those with no preschool education.

Follow-on studies. Following the results of these studies completed in 2014, the purpose of the present book sector study is twofold:

- 1) To document the book sector processes, which although well-known to the Moroccan government and other stakeholders, has not to date been well-documented for external audiences.
- 2) To start the discussion on possible entry points for improving the quality and effectiveness of early grade reading materials, including increasing the use of supplementary reading materials in the classroom.

The main research questions include:

- What are book production and distribution policies and systems?

- Do they ensure that adequate supplies of appropriate quality books are provided to schools efficiently and on time?
- What production and distribution policies may be prohibiting effective large-scale print production and distribution?
- What materials exist in Morocco that could help support a culture of reading in and out of school?

For the latter question, the study looked at supply and demand of supplementary reading materials in Arabic language. The present report concerns primarily a detailed analysis of the textbook production sector for primary school Arabic language textbooks, but includes a short annex (*Annex 2*) with data on supplementary materials.

The research, funded by USAID under the EdData II contract with RTI International,⁶ committed to preparing analytical reports, summaries, and presentations across these areas of inquiry, and to engage stakeholders in policy dialogue addressing the implications of the findings.

1.3 Methodology

The study is based on the assumption that an important element to replicating and scaling up reading improvement interventions is the availability of appropriate teaching and learning materials. Factors that influence material availability include a) book production costs (quantity, quality and durability of book types); and b) book procurement and distribution systems (central or decentralized procurement processes, timely delivery of materials, appropriate quantities). The information collected from this study was designed to inform tradeoff decisions on costs of large-scale print productions. The study team gathered data related to

- information on current procurement and distribution processes for public school textbooks, particularly primary school Arabic language textbooks; and
- analysis of the local market for supplementary reading materials.

Largely qualitative in nature, this was accomplished through semi-structured interviews with key public and private entities, associations, and parents. However, some structured surveys were used to gather information about the origin, price, and content of Arabic-language reading materials. The team also conducted an extensive desk review of existing documentation related to textbook development and distribution, data from the national statistics office related to enrollment and budgets, laws related to copyright, local and international press reports related to the book sector, catalogues from major book publishers, and more. Key documents were either translated from Arabic or summarized in French. *Exhibit 5* summarizes the distribution of respondents.

⁶ Under Task Order 15, providing missions in the Asia and Middle East regions with specific local data needs and analysis of trends.

Exhibit 5: Summary of interviews (number of people by type)

Interviewee	Number of people
Ministry officials (Education and Culture)	9
Publishers	5
Civil society organizations	4
Distributors	3
Authors*	2
Printers**	1

* The team leader for textbook authors were interviewed by email, collective response.

** Some publishers are also printers.

Source: Authors

The information from the interviews and desk research forms the basis for the results presented in section 3.1 of this report.

For structured surveys, an electronic data collection tool was used (Tangerine™) so that information could be captured on mobile devices directly from bookshops, libraries, or other venues. However, many books were actually purchased and then catalogued using Tangerine later. Data from this tool were exported to Excel for analysis.

The Moroccan International Publishing and Book Fair (*Salon International de l'Édition et du Livre* [Book Fair]), held from February 13 to 22, 2015 in Casablanca was an important opportunity to collect information on the diversity of publishers and materials (supply-side) outside of school textbooks. Additionally, it was an opportunity to interview buyers to understand some aspects of the demand for different types of books. A total of 79 interviews were conducted by two research assistants at the Book Fair. Individuals were asked at random if they would be willing to answer a few questions. The interview questions were developed first in English, and then adapted to the local context and translated into French. Questions were asked in French, Arabic, or Darija depending on the preferred language of the interviewee. If an individual did not purchase books that day, the interview was discontinued. The breakdown of respondents by category is provided in *Exhibit 6*, below.

Exhibit 6: Summary of respondents (Book Fair client questionnaire)

Gender	Book Purchase		Total
	No	Yes	
Male	2	33	35
Female	4	40	44
Total	6	73	79

Source: Authors, based on client questionnaire

In total, information from 190 books and workbooks outside of the formal primary school Arabic language textbooks was captured in the inventory. The information from these two surveys provides the basis for the results presented in the *Annex 2* on Supplementary Materials.

1.4 Arabic reading instruction in Morocco

Curriculum and instruction. The curriculum for teaching Arabic language in the early grades was adopted as a concrete measure to achieve the goals of the National Charter relative to strengthening the teaching of Arabic while addressing the needs of the learners. It stresses the necessity of being conscious of the expectations of students and their social, artistic, intellectual, psychological, emotional, and physical needs and of making learners the center of interest, thinking, and action during the process of education and training. It also promotes achievement of its goals through developing self-confidence, openness to others, and positive interaction with the social environment, regardless of its different levels, and through appreciation of work, diligence, and perseverance. There is a strong emphasis on Islamic values and citizenship in the curriculum, organized by themes in the first few grades of primary school.

The curriculum promotes a competency-based approach, achieved through adopting a set of principles, namely:

- Interactive learning, instead of learning by rote
- Continuity, in which every stage established a foundation for the subsequent one
- Complementarity, in which there is no separation between linguistic and cultural knowledge
- Production, which focuses on creating unique speech (not choral recitation), whether sentences, grammatical structures, or longer presentations.

While these goals are admirable, in practice, they translate into complex subject-matter content, particularly for Arabic language instruction. Based on other studies done in the context of USAID’s support to the education sector, Arabic language reading instruction in Morocco is similar to that of other countries in the Middle East and North Africa region,⁷ where reading is not a separate subject, but is taught under the heading of “Arabic language” in the early grades. Reading instruction may also be taught indirectly through other courses in the curriculum, including Islamic studies. Similarly, the prevailing teaching method in Morocco, as in other Arabic-speaking countries, is the whole-language method.

Despite stated goals of active pedagogy, classroom observations in Morocco, as well as interviews with teachers, suggest that most teaching involves rote memorization or choral recitation of texts from the board or from textbooks. There is little indication that teachers focus on phonemic awareness, letter-sound correspondence, decoding of words, and individual word reading prior to immersing children in lengthy texts focused first and foremost on thematic content and secondly on linguistic elements that support reading, such as letter sound and word repetition, and word roots (morphology). There was little differentiation of instruction through individual or group work, and classrooms were found to be using mainly teacher-centered, whole class instructional methods. Again, this is not unlike other countries in the Arabic-speaking world, according Boyle, Ajjawi, and Xiang (2014), nor is it surprising considering that the textbooks listed in *Exhibit 7* do not include a focus on

⁷ Boyle, H., Al Ajjawi, S., & Xiang, Y. (2014). Topical analysis of early grade reading instruction (Project report for EdData II Task Order 15: Data for Education Programming in Asia and Middle East). Research Triangle Park, NC: RTI International.
<https://www.eddataglobal.org/documents/index.cfm?fuseaction=pubDetail&ID=707>

basic instructional strategies such as letter-sound correspondence, phonemic awareness, decoding or vocabulary, and fluency-building through repetition in context.

Textbooks. *Exhibit 7* below shows the approved books that have been selected for instruction of Arabic language instruction in Grades 1 to 3. The limitations of these textbooks were described in detail in a 2014 report by RTI International and Al Akhawayn University.⁸

Exhibit 7: Availability of textbooks

	<i>Kitaabii</i>	<i>Fii riHaab</i>	<i>Murchidi</i>	<i>Al Mufiid</i>
Grade 1	Yes	No	No	Yes
Grade 2	Yes	Yes	Yes	No
Grade 3	No	No	Yes	Yes

Titles are shorthand for the full Arabic names of the textbooks, which are referenced fully in the above-mentioned report (footnote 8)

Additional problems related to the quality of Arabic language instruction stem from the fact that:

- No publisher produces a complete textbook series (first to third grade) because at least one of each publisher’s textbooks has been rejected. A child can, therefore, be faced with books from three different publishers from Grade 1 to 3 rather than a complete sequence, and one which represents a logical and progressive learning path;
- Not all textbooks are accompanied by a workbook or other leveled materials designed to cater to the needs of children with different academic or linguistic backgrounds.

Therefore a key objective in studying the book sector is to determine what steps might be taken to realistically and affordably improve the quality of Arabic instruction through revision of, or addition of, teaching and learning materials for early grade reading in Arabic.

2. Theoretical Framework

2.1 Textbooks and other instructional materials for early grade reading

Why textbooks? While arguments about reading instruction methods continue to fuel debates among educators around the world, there are at least two common principles that experts agree upon:

1. Children learn to read through explicit and direct instruction (unlike, for example, learning to speak, which is a skill acquired indirectly).
2. Learning to read requires reading materials (preferably an abundance of materials of different levels and topics).

The Dakar Framework emphasizes that school systems should strive to have “books, other learning materials and technologies that are context-specific, cost effective and available to all

⁸ RTI International (2014a). Research on reading in Morocco: Analysis of national curriculum and textbooks for Arabic language. Final report: Component 1. (Project report for EdData II Task Order 15: Data for Education Programming in Asia and Middle East). Research Triangle Park, NC: RTI International. <https://www.eddataglobal.org/countries/index.cfm?fuseaction=pubDetail&ID=703>

learners.”⁹ When learning to read, extensive contact with books is essential and helps ensure that instructional time is more efficient.¹⁰ When children are issued their own textbooks and reading materials, they can take the books home and increase their contact time with print, especially in the absence of books at home. Where textbooks are not available, teachers spend less time teaching and more time writing on the board. Similarly, children’s time is spent copying into an exercise book, which is also dependent on handwriting skills and encourages rote-memorization rather than active learning.¹¹ Exercise books that encourage productive (writing, speaking) as well as receptive (listening, reading) skills are also necessary but can focus on incremental introduction of writing skills and needs. Several studies cited in Abadzi (2009) demonstrate the effect of textbooks on achievement, and show that compared to other inputs, textbooks represent a small percentage of education spending. Textbooks have been identified as the most cost-effective input to improve learning achievement.¹²

The facts above are important points of departure for this study, and together they form the rationale for studying the quality and availability of textbooks in schools.

Textbooks are not only an important source of reading material for learners, but they also constitute the framework for instruction, including the sequence, pace, content and instructional approach used in the classroom. For the purpose of this study, we use the term “textbook” to describe a book that provides a sequence of content that a teacher can use to structure lessons throughout a given period of time. Textbooks may be designed as a collection that includes a teacher’s guide, workbooks,¹³ and manipulatives (flash cards, letter cards, etc.) that are directly linked to the content of the textbook and support instruction of the textbook’s content. Supplementary materials are other reading materials, whether officially mandated by the curriculum or sourced by external content providers, including storybooks, magazines, comic books, posters, workbooks, reference materials (such as dictionaries or encyclopedias), and more. Although not designed intentionally to support a specific curriculum or textbook, they can be used to do so.

In Morocco, previous studies undertaken in the context of the reading research program by USAID highlighted the importance of textbooks for teachers who receive little training in Arabic reading instruction during pre-service education. Teachers with low self-confidence in their ability to teach reading are highly dependent on the teacher’s guide and the content

⁹ United Nations Educational, Scientific, and Cultural Organization (UNESCO) (2000). The Dakar framework for action. Education for all: Meeting our collective commitments. Strategy 8.
<http://unesdoc.unesco.org/images/0012/001211/121147e.pdf>

¹⁰ Abadzi, H. (2006). Efficient learning for the poor: Insights from the frontier of cognitive neuroscience. Washington, DC: World Bank. <http://documents.worldbank.org/curated/en/2006/06/6892301/efficient-learning-poor-insights-frontier-cognitive-neuroscience>

¹¹ Crabbe, R., Nyingi, M., Abadzi, H. (2014). Textbook development in low income countries: A guide for policy and practice. Washington, DC: World Bank, <https://openknowledge.worldbank.org/handle/10986/18667>

¹² Majgaard, K., & Mingat, A. (2012). Education in Sub-Saharan Africa: A comparative analysis. A World Bank study. Washington, DC: World Bank.
<http://documents.worldbank.org/curated/en/2012/06/16498934/education-sub-saharan-africa-comparative-analysis>

¹³ The term “workbook” is used to describe a book with pre-printed exercises that children are expected to do, writing directly in the book (circle items, draw lines, practice letters, write sentences, write essays, etc.). An “exercise book” is the term used for a book with blank pages that a child can use to write anything in, as directed by the teacher, or by a textbook.

proposed by the textbooks.¹⁴ If this feeling of inadequacy is widespread and teachers are dependent on teaching the content of the textbooks verbatim, then it is very important that the content and structure of these books be of high quality, reflecting the best evidence of efficient reading instruction in the early grades.

What content for textbooks? While this report is not meant to be a detailed discussion of textbook content, it is important to clearly state the assumption that when analyzing the book sector, the authors are looking for evidence of the following “best practices” according to certain country standards. Textbooks for early grade literacy instruction are expected to offer many learning opportunities to teach a variety of skills related to reading acquisition, which span multiple development stages. *Exhibit 8* provides an alphabetic list of the content that early grade reading textbooks can provide.¹⁵

Exhibit 8: Content of early grade reading textbooks

Alphabetic principle	Grammar	Story Structure
Comprehension	Handwriting	Spelling
Concept of word	Language (expressive and receptive)	Vocabulary
Decoding	Phonemic awareness	Writing
Fluency	Phonological awareness	
Genres	Print concepts	

Three general factors influence decisions about the content of the textbook: developmental stage of the readers, the curriculum, and availability of other materials. First, the content of textbooks should be guided by the reading development stages of the children (emergent, beginner, transitional, intermediate, or advanced). It is common to have readers from multiple stages in the same classroom. For example, a Grade 2 classroom will likely have children who are emergent, beginner, and transitional readers. If there are not multiple levels of books in the classroom, then the textbook has to meet multiple levels. Furthermore, emergent readers will only interact with a textbook a short amount of time each day. For many, this might be their first opportunity to learn about the role of books. If the font is large and the book has large and engaging images, beginning readers will spend more time with the book—but the book can’t be heavy or difficult to keep open. It must have images that support word recognition. As readers advance to the next stage, the textbook can have more pages, more words or pictures on a page, and illustrations aren’t required for every line of text. Good textbooks include pictures or drawings, opportunity to practice, and repetition, including links to material previously covered.¹⁶ Textbook design must also ensure that content aligns with the curriculum; ideally, the curriculum specifies key milestones in reading skills acquisition, and the precise point in time when children are expected to acquire those skills (e.g., “by the

¹⁴ RTI International (2014b). Research on reading in Morocco: Analysis of initial teacher training. Final report: Component 2. (Project report for EdData II Task Order 15: Data for Education Programming in Asia and Middle East). Research Triangle Park, NC: RTI International.

¹⁵ Text in this section was originally prepared and presented by RTI at the State of the Art in Arabic reading conference held in Rabat in October 2014. A recorded copy of the presentation is available at: <https://www.eddataglobal.org/video/index.cfm#textbook>

¹⁶ Abadzi (2006); Davidson, M. (2013). Books that children can read: Decodable books and book leveling. Report prepared for USAID by Aguirre Division of JBS International. http://pdf.usaid.gov/pdf_docs/pa00jw1v.pdf

end of the first quarter of Grade 1, children shall be able to identify the name and sound of these letters”). Depending on whether other materials are readily available (story books, workbooks, digital materials), the textbook may have a more or less important role to play in reaching those milestones.

Textbook policy. At the most basic level, national book provision policy should guarantee barrier-free, equitable access to high-quality and cost-effective textbooks for students (and corresponding teaching guides for teachers). The supply and demand of textbooks should be sustainable in the long-term.

Policy should strive to ensure that no child is denied the opportunity to learn because of significant barriers to the full, adequate use of a textbook for reading instruction. Barriers to equitable access come in the form of:¹⁷

- **Inadequate supply:** The supply of textbooks may not be sufficient or adequate for the learning needs of all children. For example, there may not be textbooks available for a specific curriculum, or in cases in which mother tongue instruction is policy, there may not be textbooks for all targeted language communities. Additionally, low-quality textbooks may also constitute inadequate supply (see *Exhibit 9* on high-quality textbooks).
- **High costs:** The cost of developing and/or printing textbooks, and therefore the price, is too high to ensure access on a one-to-one ratio. Alternatively, the budget allocated for textbooks may be too low to ensure access on a one-to-one ratio. The main sources of financing for the purchase of textbooks are a) government (national, regional, local), usually through taxpayers’ money or donor funds; or b) parents, who will purchase books directly or by paying school fees.
- **Distribution problems:** Books may not effectively reach children in schools. For example, textbooks may not be distributed to the most hard-to-reach places due to a lack of infrastructure or a weak nationwide network of booksellers. Books could also become damaged in storage or while being transferred to schools. Or, once books reach their destination, they may not be distributed freely among students because teachers and school administrators hoard them as a response to perceived future shortages.

Many governments choose to have one national textbook policy (one document) that can be shared with a range of stakeholders and that clearly outlines ambitions and minimum standards for textbook quality, provision, and use in classrooms. Preparation of the document can be a useful long-term planning exercise for coordinating all the elements of the education system and publishing sector, including establishing roles and responsibilities, identifying priorities, setting standards, establishing financing, and planning for how textbooks are integrated into the school system by teachers (including training needs).¹⁸ As a reference document, the policy ensures that standards and procedures are transparent and unambiguously communicated to all stakeholders, and can help coordinate donor support. A

¹⁷ Crabbe, Nyingi, & Abadzi (2014).

¹⁸ Brunswic, E. & Hajjar, H. (1991). Planning textbook development for primary education in Africa. Report of an IIEP [International Institute for Educational Planning] Seminar. Maputo: UNESCO.
<http://unesdoc.unesco.org/images/0009/000919/091900eo.pdf>

broader national “book” policy may also be developed to describe a course of action toward promotion of a health book industry.

Exhibit 9 summarizes the elements of quality materials for reading instruction.

Exhibit 9: Elements of quality materials for reading instruction

Methodology	<ul style="list-style-type: none"> • Based on research on literacy acquisition in alphabetic languages • Textbooks emphasize a direct and explicit approach to the basic components of reading—letters, letter sounds, phonemic awareness, vocabulary, decoding, word roots or morphological pattern, fluency building, and comprehension strategies.
Scope and sequence	<ul style="list-style-type: none"> • Based on research on literacy acquisition in alphabetic languages • Textbooks are structured on the basis of the specific sequence in which children learn to read: building foundational skills like the alphabetic principle and phonemic awareness before learning to decode unfamiliar words, build greater vocabulary, and develop reading fluency.
Content	<ul style="list-style-type: none"> • Aligned with the curriculum • At the appropriate reading level for children, based on available research • Age-appropriate and engaging, based on well-developed criteria • Culturally relevant, based on well-developed criteria • Inclusive and free of bias • Free of grammatical and spelling errors
Readability	<ul style="list-style-type: none"> • Vocabulary and syntax appropriate for reading level of children, based on available research • Appropriate font type and size for reading level of children, based on available research • Appropriate letter spacing and line spacing for reading level of children, based on available research • Attention to where whole words or sentences break at the end of a line or page
Aesthetics	<ul style="list-style-type: none"> • Adequate margins and organized layout to ensure ease in finding and following sections • Clear, attractive illustrations are well-placed on the page and complement the text • Good print quality (does not result in ‘bleeding’ or ‘creeping’) • Cover design attracts the reader and gives an idea of what is inside the book • Printing specifications, such as color, trim size, and paper selection contribute to a pleasant reading experience
“Harmony of the ensemble”	<ul style="list-style-type: none"> • There is cohesion and consistency between levels and titles, both in terms of content and design • There is logical progression between levels (for example, font size will decrease progressively as the reading level advances) • There is correspondence between the student book and the teacher guide
Functionality, durability, cost-efficiency	<ul style="list-style-type: none"> • The form of the printed and bound final product is well-matched with its function and final user (for example, textbooks for younger children should not be very large or heavy, binding type should allow it to lay flat). • The printed and bound final product can withstand wear and tear for at least three years • The best results, in terms of content, aesthetics, and final printing and binding are achieved at the lowest possible investment in the development and production of the book.

In terms of textbooks, cost-effective means achieving the best quality outcome for the lowest cost possible (it does not mean spending the least amount of money on textbooks irrespective of the final outcome). There are many actors involved in taking a book from its conception stage through to its final recipient, a concept known as the “book chain” and which this report explains in greater detail in section 2.1. The contribution of each actor has a cost and some of

these costs are transferred to the ultimate buyer in the retail price. Author’s experience¹⁹ and publishing industry analysis by blueTree Group, an independent organization, shows that the main drivers of textbook prices are publishers’ overhead costs and sales commissions.²⁰ See **Exhibit 10**.

Exhibit 10: Drivers of textbook costs

Cost breakdown of book retail price	South Africa	Sub-Saharan Africa
Bookseller commission	30.0 %	23.0%
Author/Illustrator royalties	10.5 %	11.0%
Origination (development of content and design)	13.5 %	N/A
Production (printing) costs	11.5 %	32.0%
Publisher’s overhead costs	34.0 %	34.0%
Total	100.0 %	100.0%

Source: Information and data from analysis reported in blueTree Group (2012) and from a World Bank report used in the analysis by Crabbe, Nyingi, and Abadzi.²¹

As can be observed in **Exhibit 10** above, though the drivers of cost remain the same across the industry, the make-up of costs will vary from country to country; especially, the cost of the booksellers’ commission and printing.

The bookseller’s commission and royalties are estimated on the basis of the retail price of the book. If the retail price of a book is 100 dirhams, then a bookseller retains 30 dirhams of each copy sold, and the author receives 10.5 dirhams of each copy sold.

- The unit cost of origination, distribution, and overhead is calculated by dividing the total cost by the total number of copies printed.
- Printing costs respond to economies of scale, whereby unit cost decreases as the quantity of copies printed increases. Printing costs also respond to printing specifications (trim size, number of pages, number of colors used for printing cover and interiors, paper weight and type, binding, lamination).

Therefore, to reduce the cost of a book one could do any of the following:²²

- Eliminate the bookseller or (royalty-receiving) author from the chain. The pros and cons of these decisions, however, need to be weighed carefully.
- Control origination and overhead costs, without affecting the quality of the outcome, although some tradeoffs will be inevitable.

¹⁹ Robledo, A. (Invited Speaker). (2015, March). The process of “making books”. Presented at the 59th Annual Conference of the Comparative and International Education Society, Washington, DC.

²⁰ blueTree Group. (2012). Book costs across the book chain. Global Partnership of Education (GPE) Community of Practice Workshop: Getting the right books to kids. Retrieved from <http://www.globalpartnership.org/content/books-costs-across-book-chain>

²¹ World Bank (2002) World Bank Support for Provision of Textbooks in Sub-Saharan Africa 1985-2000. Cost Recovery and Affordability, in Crabbe, Nyingi, & Abadzi (2014)

²² Crabbe, Nyingi & Abadzi (2014).

- Control printing costs by making cost-effective decisions about printing specifications or save on the cost of paper by reducing the dimensions of books, as well as the number of pages;²³ eliminate the customs duty on paper; or a ministry or government agency could buy the paper used for textbooks in bulk in the international market and distribute it among printers, thereby saving on costs.
- Print as many copies as possible, without exceeding storage capabilities.
- Be more specific about the textbook renewal²⁴ cycle (i.e., 3 years or 5 years) so that origination costs can be spread over that period, therefore reducing the unit costs.

2.2 Book production

The following section provides a detailed description of general textbook production chains, not Morocco-specific ones. It provides important definitions and background that is expected to help the reader better understand the issues that will be discussed relative to Morocco in section 3. It also aims to make apparent the different objects of analysis and potential findings that were the reference in developing the methodology, lines of inquiry and analysis relative to the Moroccan case. These objects of analysis are shown in *Exhibit 11*.

Exhibit 11: Milestones in the book production chain

Procurement Planning and Acquisition Strategy	Ideally, a government should plan an acquisition strategy before issuing a tendering process. Aspects to be planned and assessed include financing and budgeting, country book needs, and local capacity.
Content and Print Specifications	Everything—from the curriculum and the methodology, to design, to printing specs—that must be defined before origination begins
Origination	A book gets developed (written, edited, proofed, designed, typeset, etc.) and made ready for print.
Selection	Available titles are evaluated and selected for use in schools.
Procurement	Procuring agency issues a tendering document or a purchase order to acquire a book for distribution in schools. Alternatively, books are placed in the market and the client or end user buys the book directly from the sales channel.
Production	Books are printed.
Storage	Books get stored temporarily in preparation for distribution to schools.
Distribution	Books get delivered to schools, or books get placed in the market.

²³ Often, a smaller book, with fewer pages (and therefore, less weight) is more functional for younger children, who would struggle with a larger, heavier format. See USAID (2013). Books that children can read: Decodable books and book leveling. Washington, DC: USAID. http://pdf.usaid.gov/pdf_docs/pa00jw1v.pdf

²⁴ “Textbook renewal” here refers to a complete review and revision of textbook content, through a new origination process (i.e., a competitive bidding process). It does not mean the textbook lifecycle (the amount of time it can be expected to be used in good condition) or reprint cycles (annual, bi-annual reprinting of the exact same edition).

The book chain. The term book chain is an expression for the processes involved in bringing a book from the hands of its author to those of the end user. It also describes the links between the different stakeholders in the book publishing and distribution processes, such as the government (Ministry of Education), which is responsible for textbook policy, curriculum development, and procurement, and booksellers, who deliver the books to the end user.²⁵ Actors in the book chain come from different areas of specialization, and often have different perspectives and agendas. “If these relationships function well, the result is successful book provision and a thriving publishing industry. If the chain is broken at any point, this will affect the effectiveness of the other stakeholders and the industry as a whole.”²⁶

In the case of government-led provision of textbooks and other learning materials to schools, the Ministry of Education is considered part of the book chain, due to its role in defining textbook policy, developing curriculum, and procuring books for schools. In most countries, however, publishers, coordinate the relationships between the rest of the actors in the book chain, possess the know-how on how to develop textbooks, and assume the cost of the entire book development, production and distribution process.

In countries that do not have a well-established publishing industry, the Ministry of Education may choose to assume the role of publisher to ensure the supply of textbooks. In countries with a mature publishing industry, the government may still assume the role of publisher, usually as a political decision. However, ever since the decentralization trends of the 1990s, textbook development and provision in many developing countries is divided between the public and the private sectors, where most of the processes of the book chain are led and financed by private publishers.

There are several options and combinations for the cooperation between the public sector and private publishers, as shown in *Exhibit 12* below (where G indicates government responsibility and P private):

Exhibit 12: Government/private sector distribution of responsibilities

	Model					
	1	2	3	4	5	6
Curriculum	G	G	G	G	G	G
Development of text and illustrations	G	G	G	G	P	P
Editing	G	G	G	P	P	P
Pre-press preparation	G	G	G	P	P	P
Printing and binding	G	P	P	G	P	P
Distribution, storage, sale	G	G	P	G	G	P

Legend: G: government undertaking; P: private-sector undertaking
Source: Askerud (1997)

There is no “one best” model between the public and the private sectors, although in countries in which the book chain is robust, the sixth alternative could be considered the most viable strategy. In this scenario, each sector is responsible for what they do best; the Ministry of Education decides national policies (among them, the curriculum), makes laws and

²⁵ Askerud, P. (1997). *A Guide to Sustainable Book Provision*. Paris: Unesco. Retrieved from <http://unesdoc.unesco.org/images/0011/001106/110638eo.pdf>; Crabbe, Nyingi, & Abadzi (2014).

²⁶ Crabbe, Nyingi, and Abadzi (2014)

regulations, and exercises quality control, while private publishers produce books and compete for a share of the market. As for alternatives two through five, these are strategies in which the state would be called to intervene to remedy the failure of a particular link in the book chain, which could occur for any number of reasons: lack of local capacity, very high prices (potentially due to monopoly), corrupt practices, emergency, etc. In any case, the book industry should be a strategic partner for government.²⁷

The development and production process of books. The curriculum, the teaching and learning methodology, and the scope and sequence—what will be taught, and how it will be taught—can be considered the “raw material” of textbooks. As is the case in industrial processes, the better the quality of the raw materials, the better the quality of the final product. However, the process—or production chain—through which the fundamental building blocks of learning materials are transformed into a final printed and bound product, is also crucial for determining quality. The technical know-how and the creativity that are infused into this process are what is known as the publishing craft. Therefore, it is conceivable that even if several publishers were to produce textbooks on the basis of the same curriculum and government-mandated specifications, the results could be dramatically different.

Activities within the book production chain can be grouped into three main groups:

1. The planning stage: Includes the processes of book concept proposal, prototype development and testing, and final decisions regarding elements that affect project costs.
2. The development or *origination* stage: Includes all of the work and cost involved in producing a book up to the point of manufacture, including editing, design, typesetting, proofing, and indexing.
3. The production stage: Refers to the printing process and its respective stages: pre-press, press, and post-press.

Different publishers may have different protocols in place for the planning, development, and production stages, and different types of books may require slightly different processes as well. However, the basic workflow is the same across the entire industry: contents are written and edited, usually in tandem with the development of graphic elements (design, illustrations), and finally, text and graphics come together in the layout. The larger differences usually lie in the way publishers approach the planning stage. As success in the publishing industry is measured in terms of sales and market share, publishers may not have an incentive to experiment with materials unless it serves their commercial purposes. If effectiveness is not absolutely required for market success or for winning a public bidding process, it is quite possible that publishers may skip this part of the process entirely. Nonetheless, learning materials that have not been tested in the field at some stage during their development process may, in the end, not be well adjusted to users’ needs, reading levels, and circumstances. For example, textbooks are usually developed in urban centers, where most publishing hubs are found, and the experts involved in development may be out of touch with the realities of children, teachers, and schools in rural areas. The result may be reading materials that are difficult for children in rural areas to follow or understand, which may have a negative effect on their learning.

²⁷ Crabbe, Nyingi and Abadzi (2014); Askerud (1997)

The book production chain is a time-sensitive process, riddled with potential pitfalls at any stage. Seasoned publishers will have learned how to best avoid those pitfalls, or minimize their effect, by setting clear goals for quality assurance milestones in the process, especially prototype testing, copyediting, and proofreading (see *Exhibit 13*).

Exhibit 13. Typical production process for textbooks

Step in the process	Description
1. Conceive and propose	The specific titles to be developed are initially proposed (the “publishing plan”): Textbook, Teacher’s Guide, Student Workbook, decodable and leveled readers, etc. The teaching and learning methodology approach, the scope and sequence, and specific chapters or units of each book are initially proposed as well.
2. Create a prototype	For each proposed title, a sample of units (chapters) is selected and a prototype is developed for each one. Sample text and illustrations are developed, as well as a design proposal. The prototype should be as close to the desired finished product as possible. As a result of this exercise, the publishing team learns, through trial and error, the best alternatives for content, design, layout, and printing specifications. Throughout this process, they also take notes of what they want to learn once they test these prototypes in the field.
3. Pilot	Based on a specific set of questions that were developed during the prototype stage, the model chapters for each book type are tested on students and teachers. Ideally, prototypes should be tested on a sample that reflects the different types of schools and children that will be using the textbook. Lessons learned in this stage are incorporated as changes to the prototypes
4. Budget and plan	Based on information collected during the prototype and piloting stages, the publisher develops an initial work plan and a budget and tests it against the deadline for product delivery and available funds. If there are limitations to time and budget detected during this stage, the publisher might have to make additional changes to its initially proposed plan and prototypes. Often, the prototype, the work plan, and the budget are developed and adjusted in tandem.
5. Write	Based on the final prototype, the full contents of the books are then developed. While sample contents were developed for the prototype stage, during the present stage, the entire contents of the book are written. Only the text is written and typed at this stage. As a preliminary step to the writing, editors should have developed guidelines or a scope of work for writers, also based on lessons learned in the prototype stage. Once writers submit their first draft, editors ensure that it complies with the guidelines; otherwise, they may request rewrites until the text achieves the desired quality.
6. Copyedit	The formatting, style, and accuracy of the text are reviewed and, if necessary, corrected. By the end of this stage, the text, which was already approved in the writing stage, should be “clean” and free of errors. Leaving this “text cleaning” process for a later stage may cause inefficiencies in the production chain.
7. Illustrate	Ideally, the illustration process should not begin until the final text is approved and corrected; otherwise, the risk is that illustrations may need to be redone to match the final text, causing inefficiencies in the production chain. As with the text, illustrations are also subject to the approval of the editor before moving on to the next stage.
8. Layout / typeset	Final text and illustrations are placed within the page layout design for each book and chapter. Doing the layout before the text and the illustrations are approved may also cause inefficiencies in the production chain.

Step in the process	Description
9. Correct proofs	This is the final quality check, in which “proofs,” or printouts of the layout with text and illustrations are revised. The proofreader will be looking for possible errors or inconsistencies in the layout, art, and production.
10. Submit for approval	The approving entity, be it the editor-in-chief, or the Ministry of Education, reviews the final product and approves (with or without changes) for printing. If changes are requested, they must be inserted and final files will have to be resubmitted for approval.
11. Finalize for print	Art Director develops final PDFs for printing and ensures that all pre-press preparations are in order before printing begins and gives the printer the “green light” for printing.
12. Print	The books are printed.

Source: Robledo (2015)²⁸

The quality of the outcome of the production chain will also depend on several important factors: time, funding, and local capacity for performing specialized tasks such as desktop publishing. These factors are not always within the control of publishers and impose difficult tradeoffs that may affect the quality of textbooks. A publisher that is pressured for time may decide to skip some (or all) quality assurance milestones. In order to meet a tight budget, a publisher may opt to print on inexpensive, low quality paper.

The time invested in developing materials depends on many factors, among them, the number of titles being developed at the same time, staff or contractor’s availability, and a publisher’s quality standards. However, more often than not, individuals not experienced with the process of producing high-quality books may grossly underestimate the time required for the entire process. *Exhibit 14* below shows an example of time required for the development and printing of textbooks. Note that this does not include the time spent by government on the procurement process (developing the specifications, issuing a call for proposals, evaluating offers, issuing a print contract). Overall planning for textbook provision requires considering the time for planning and implementing the procurement process and then distributing books to schools post-printing.

**Exhibit 14: Time required for the development and production of textbooks
(illustrative example based on international experience)**

Process in the production chain	Time
Conceive original concept	3 months
Create and pilot prototype & budget, plan, decide on final	3 months
Write, copyedit, illustrate, layout, correct proofs	12 months
Finalize for print	1 month
Print	1 months
TOTAL	20 months

Source: Ana (2015)²⁹

²⁸ Robledo, A. (2015). The process of “making books”. Presented at the 59th Annual Conference of the Comparative and International Education Society, Washington, DC.

While detailed know-how of the production chain for textbooks is within the purview of publishers, government officials involved in the design of book provision projects, as well in the development of a national book policy, should be familiarized with the process. This knowledge will help them understand the investment in time and funds that is required for the development of high-quality learning materials, and to plan procurement processes in accordance with these realities. If procurement processes for the provision of textbooks are not based on a basic familiarity with the time, money, and specialized skills required, publishers may be forced to skip steps, such as quality assurance, to meet deadlines or adjust to the available budget.

Authors and illustrators. Those who write the text and create the illustrations for a book are usually considered the intellectual property owners of their original work. Intellectual property automatically confers copyright, or the right to reproduce and disseminate that work (gratis or at market price). Therefore, writers and illustrators could conceivably reproduce their work themselves and sell it at a price in the market, if they wanted to. In fact, today, through the advent of information and communications technology, many of them do. However, many writers and illustrators still aspire to sign a contract with a publisher, as publishers have the expertise in preparing a quality final product, distributing it and disseminating it among potential readers. When an author or illustrator signs a publishing contract, they are fundamentally releasing their copyright to the publisher, usually for a fixed amount of time and for a specific territory, and for a portion of the profits of the sales of their work. (When the contract expires, the copyright automatically reverts to the author.) Royalties, therefore, are a percentage of the gross sales (retail price) of each copy of the book sold, which the author or illustrator receives in recognition of their stake in the book.

The original work of an author or illustrator may, in some cases (especially in works of fiction), be considered the most valuable asset of a book. Yet, royalty rates for hard copy editions in commercial publishing are usually not higher than 15%. The reason is that publishers are the ones that invest their capital in the publishing project and therefore have the most to lose if the book does not sell. Authors, furthermore, are paid an advance against royalties upon signing the publishing contract, which usually corresponds to the estimated gross sales of the book during its first year in the market. Though not all actors in the book chain receive a percentage of sales profits, when they do—as is the case with authors and distributors—percentage they receive is estimated on the basis of the risk they are assuming in bringing the book to readers.

In educational publishing, however, royalty payment to authors may be excluded from costs if and when contents are commissioned.³⁰ The justification for commissioning work in the case of a textbook is that a publisher will usually request a very specific product from a writer, with very specific guidelines (based on a curriculum, a teaching and learning methodology, a scope and sequence, and an editorial concept). When the publisher commissions a text or illustration in this manner, the owner of the intellectual property is not the author—the publisher is. The author and the illustrator may, of course, be recognized in the book's credits and should receive honorary fees for their work, but they would not claim royalties.

²⁹ Estimate based on average time required for each process, for a full series of pupil books and teacher's guides for one subject area at primary school level, as per author's experience in the book publishing industry, and summarized in (Robledo, 2015)

³⁰ Crabbe, Nyingi, & Abadzi (2014).

Arrangements for commissioned works, whereby authors relinquish their copyright, must be properly established in a valid contract for a commissioned work.

Editors, copyeditors, graphic designers, proofreaders. Professionals involved in the origination process of books may be full-time staff at a publishing house, especially the editor and the art director. In that case, their salaries would be reflected in a publisher’s overhead. A publisher, however, may choose to outsource tasks like copyediting, layout, and proofreading to external contractors to save on overhead costs. In these cases, honorary fees would be considered part of the origination cost.

Printers. Printing costs respond to economies of scale, whereby unit cost decreases as the quantity of copies printed increases. As print runs increase, however, the cost of paper represents a progressively higher percentage of the total printing cost.

Exhibit 15: Paper cost as percent of total paper, printing, and binding cost of a textbook

Print run	250	500	750	3,000	5,000	10,000
Paper cost as percent of total paper, printing, and binding cost	4.0%	7.3%	10.2%	34.0%	40.7%	46.6%

Source: blueTree Group (2012)

Paper can represent as much as 55% of the total printing cost (*Exhibit 15*).³¹ Many countries do not produce paper nationally and are forced to import paper for their newspaper, magazine, and book publishing industries. When taxes are levied on imported paper, the production cost is increased substantially. Additionally, the international price of paper fluctuates, like the price of oil, in response to variations in supply and demand at a global level. It is not uncommon for a client to provide the paper to a printer directly, usually with the intention of saving on printing costs. A strategy that could be employed by a national government for the printing of textbooks for public provision is to buy paper when its price is low in the international market, thereby reducing printing costs for everyone, even for itself as the consumer of textbooks.³²

Printing costs also respond to printing specifications (trim size, number of pages, number of colors used for printing cover and interiors, paper weight and type, binding, lamination). When the editor and the art director at a publisher define the printing specifications of a particular book, their objective is to make the most cost-effective decisions for the finished product. First of all, they want to prevent wastage. Decisions regarding the trim size, which are the dimensions (width x height) of the cover of a printed and bound book, and the number of pages of a book can reduce (or produce) paper wastage. A printer will charge its client for the total paper its printing job consumes, regardless of whether all of that paper is effectively used or not. The aim, when defining trim size and number of pages, is to use as much of the paper that is being paid for in the printing cost. Decisions on paper weight and type, binding, and lamination should respond to the need to save on printing costs, but also to the interest of making books as functional and durable as well.

³¹ BurdaDruck. (2014). BurdaDruck Company introduction and technical guideline for printing and delivery of textbooks. Offenburg: BurdaDruck.

³² Crabbe, Nyingi, & Abadzi (2014)

Distributors. Although booksellers are usually grouped under distributors, strictly speaking distributors are those individuals or companies that transport books from their place of production to their place of distribution or sale to readers. The cost of distribution reflects, for the most part, the cost of transport, warehousing and overhead expenses of distribution companies.

Booksellers. As previously explained, booksellers play a very a large role in bringing books and readers together, and thus share a large portion of the risk and rewards with the publisher. Booksellers, then, can often negotiate a large portion of the retail price of each book. Publishers grant the negotiated percentage to booksellers in the form of a discount over the retail price of the book. Again, the discount negotiation is usually based on the risk and effort each party would have to invest in getting the book sold in the market.

Booksellers, though important, are not necessarily essential for a book distribution operation, especially when books are distributed for free to schools. If booksellers were to be eliminated from the chain, distribution costs could be limited to the costs of transport only, thereby reducing the price of books. However, the tradeoffs in eliminating booksellers as intermediaries between publishers and schools in the case of public procurement processes should be weighed carefully before making any drastic decisions. As blueTree Group noted in an as-yet unpublished 2015 report on the book sector in Kenya, provided to the authors, “Bookselling is a craft and it is often noted that where they are excluded from the book chain, distribution becomes a major bottleneck. Booksellers also provide feedback to publishers about the books, which leads to improvement and innovation.”³³

Publisher’s overhead. In addition to recovering their investment, publishers want to make a real profit on their sales. A common practice in the publishing industry is for publishers to make decisions on the viability of a publishing project by calculating their profit margin for the project. *Exhibit 16* illustrates this.

Exhibit 16: Simulation of estimated profit margin for a publisher

% Profit margin	=	$\frac{\text{Retail price} - (\text{Royalties} + \text{Printing Cost} + \text{Bookseller Discount})}{\text{Retail Price}}$
Example:		
Title:		Pupil Book, Reading, Grade 1
Unit retail price:		18 dollars
Royalties:		1.8 dollars (10% of retail price)
Printing cost:		5 dollars
Bookseller:		5.4 dollars (30% of retail price)
<i>*As content and illustrations were commissioned, publisher owns the copyright and does not owe royalties to authors and illustrators</i>		
$\frac{18 - (1.8 + 5 + 5.4)}{18}$	=	$\frac{5.8}{18} = 32\%$

³³ blueTree Group. The functioning and effectiveness of the book chain in Kenya. Unpublished report prepared for RTI International (Kenya report).

Source: Ana Robledo (2015)

Some publishers include origination costs in their viability analysis, while others do not. The reason for excluding origination costs from the benefit margin equation is that origination costs occur only once and should be recovered with the sales of the first print run. In cases in which a publisher can safely anticipate that there will be demand for a title in the medium- to long-term, as may be the case of textbooks, then it is possible to recover the origination cost through sales of reprints as well as the first print-run. The effect of distributing origination costs across several years is that the unit cost decreases, and therefore, the price. In order to risk recuperating the cost of origination through a term of several years, however, publishers, will need to be certain that a minimum level of demand will be sustained beyond the first year of publication of a book. Royalties, production costs, and bookseller discount, however, are recurrent costs that are incurred for every single copy sold, regardless of whether it belongs to the first edition or to subsequent reprints.

The assumption is that publishers will apply the benefit margin toward covering costs like origination and distribution, along with their own overhead costs. Any amount left over after covering overhead costs will likely contribute to increasing the capital of the company. Each individual publisher will have to calculate the minimum benefit margin it needs to gain from each book it publishes, adding in the factor that not all titles sell as expected.

If the above analysis yields that a particular project is not profitable or viable, publishers will have three clear options for increasing their benefit margin: a) reduce costs: royalties, printing costs or bookseller discount; b) increase the price; or c) not get involved in the project. Strategies for reducing costs incurred in royalty payments, printing, and distribution have already been discussed previously in this section. Maneuvering space for adjusting price, however, is a bit more limited. Publishers will have to constrain their price to a range that buyers will effectively be able and willing to pay. The public's ability to pay the price will be determined by income, and their willingness to pay will be determined by the value they place on a particular book.³⁴

2.3 Selection and procurement

Part of the book chain involves determining who is the publisher, whether there can be several publishers and a choice of books, and if there is a choice, then who chooses? Some of the tradeoffs between a centralized and single-choice model and a more liberalized, multiple-choice model are discussed here. In most cases centralized, monopolistic textbook publishing fails due to poor quality (content and production quality) low accountability, a tendency towards inertia and lack of renewal, corruption, and ineffective distribution.³⁵ However, centralized procurement of one single textbook (or textbook series) may be less expensive than an approach that allows schools to choose books because of bulk purchase discounts and ease of review, distribution, evaluation, etc. While the incentive for corruption is high in single-source textbook models, given the extremely large sums at stake, it is not eliminated

³⁴ Crabbe, Nyingi, & Abadzi (2014)

³⁵ Department for International Development (DFID). (2011). Guidance Note: Learning and teaching materials: policy and practice for provision. Department for International Development (DFID). https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/67621/lrng-tch-mats-pol-prac-prov.pdf

completely through fully liberalized models with direct purchase by schools based on a limited (or unlimited) approved list—there is still potential for making deals not based on quality or otherwise subverting funds destined for books. A limited choice of approved textbooks is generally a good compromise since it reduces confusion on the part of schools and allows the government to maintain a level of quality control, while also encouraging development in the book sector.

Allowing a true choice of textbooks means that some publishers may earn a better market share than others if their textbook is chosen. It also means that those who are responsible for choosing the books must know what to look for in a textbook, they must have had the opportunity to review all of the approved choices, there should be strong communication and distribution loops in place, and oversight mechanisms are still required (to ensure that textbook choice is actually made based on quality and value of the whole package). The single-source textbook model, apart from the economic tradeoffs, is risky in terms of content, since it is unlikely that any one textbook will be able to cater to all of the needs of the diversity of students. This diversity includes developmental differences (students who have attended preschool or not), language differences (home language, prior exposure to MSA), cultural differences (resulting from geography or ethnicity), and contextual factors (multigrade or single classrooms; large or small classrooms, etc.) A range of choices in textbooks would allow publishers to cater to different needs, but this implies that the publishers need freedom to target specific audiences and innovate in terms of content. A competitive process that results in several “different” textbook editions whose content is all essentially the same is not much better than having a sole source, except that it spreads the economic benefits across different entities.

2.4 Summary

This section aimed to describe a general framework for reading instruction textbooks and textbook production (all subject areas). It emphasizes that instructional content is first and foremost influenced by developmental needs of the child, curricular goals, and the probability of using other supplementary materials in the classroom to support reading instruction. The entire textbook production process, managed by the publisher (private or government), takes place within a larger “textbook chain” that includes planning decisions, procurement processes, and distribution to schools before, during, and after the actual production of the textbook. Both the production and procurement of textbooks should be situated within the context of a clear textbook policy that stipulates key decisions, standards, roles, responsibilities, and procedures along the chain.

The next section turns specifically to Morocco, to describe, and then analyze, the book chain using the procurement milestones described earlier (see *Exhibit 11*), as a framework.

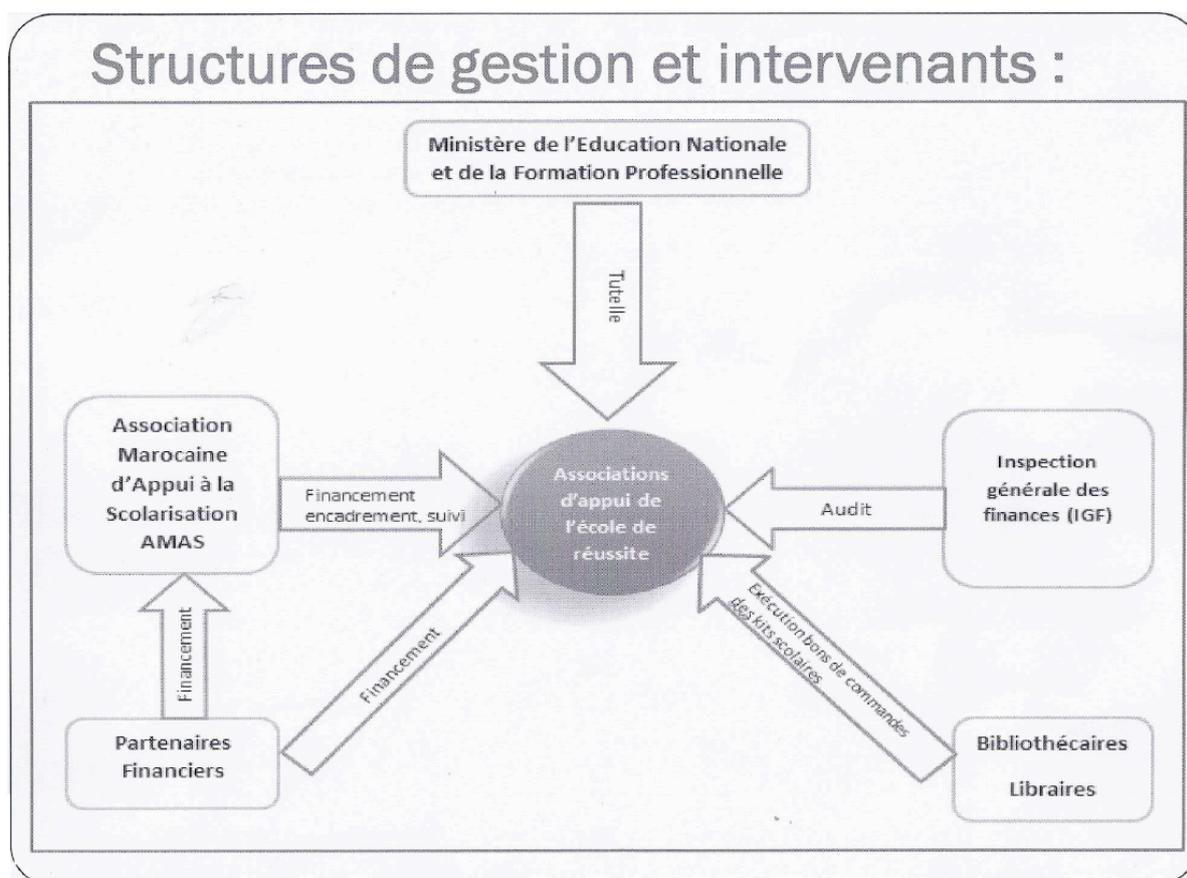
3. Findings

3.1 Procurement Planning and Acquisition Strategy

The market for all public and private school textbooks of all subjects is approximately MAD 500 million (36 million units and 390 unique textbooks), but can reach a maximum of MAD 1 billion. The state budget was MAD 200 million in 2008 for textbook provision, at the launch of the *One Million Schoolbags* project, but is now around MAD 100 million. According to most sources, availability of textbooks is not a problem, though this could not be independently verified because the Ministry of Education does not report textbook-to-pupil ratios. A rough calculation made by the authors on the basis of the Ministry budget and total books (which are reported in the National Statistical Yearbook) is that the ratio is slightly more than 1 to 1.

There is no single “textbook policy” as one might find in other countries that describes the textbook planning and acquisition strategy. Elements of policy and strategy are found in the National Charter as well as the AMAS procedural guidelines, the textbook specifications, and memos issued by the government (such as the letter from the Prime Minister). However, certain procedures are more implicitly understood rather than explicitly stated; for example, that the purchase of textbooks will be split evenly among all publishers, that schools are forbidden from purchasing other supplemental teaching and learning materials, or that publishers are forbidden from marketing directly to schools. An overview of the process and actors involved appears in *Exhibit 17*, below.

Exhibit 17: Management and implementation structures for textbooks



Source: AMAS

This diagram shows that at the center are the school associations made up of parents and teachers who support textbook purchasing. They are under the authority (*tutelle*) of the Ministry of Education. Donors (*partenaires financiers*) provide financing either directly to schools, or through the AMAS, which manages funds and procedures, especially delivery of school kits (see information on the *One Million Schoolbags* program in section 1). The Inspector General (*Inspection générale des finances*) is responsible for auditing, while libraries (*bibliothèques*) and bookstores (*libraires*) provision schools with materials ordered outside the context of the school kits. **Exhibit 18** details the process, as described by the Ministry of Education.

Exhibit 18: Overview of textbook procurement process (all subject areas)

1. Ministry of Education issues a call for proposals in at least 3 newspapers.
2. Publishers that wish to make a proposal must first send a technical file including fiscal information, staff and technical capacities, financial information, and a list of authors with CVs. These files are reviewed by a committee composed of *Direction des Curricula*, *Direction des Affaires Générales et Direction des Affaires Juridiques*. In the case of missing information the Ministry of Education writes to the publisher to complete the file. This process takes 2 weeks.
3. Eligible publishers (after this review) are then given officially 14 months to issue a textbook (time allotted was only 3–4 months in 2002 when the current Arabic textbooks were produced).
4. Three sub-commissions (Language, Design, Values) report to a cross-sectoral evaluation committee. Members are anonymous but made of inspectors, instructional designers, teachers, university professors, and teacher trainers who are nominated by the Minister of Education based on a proposal from *Direction des Curricula* and inspectors. They must declare that there is no conflict of interest, and there is a background check to verify that members of the commission are not textbooks authors nor affiliated with publishers. In cases where this happens, the textbook in question is eliminated.
5. Four anonymous copies of the textbooks are sent to the commission (+1 sealed contains name of editors and authors).
6. The commission reviews the submissions and makes its recommendation. When a book is accepted, it may be accepted with some requests to revise and comment on the content. When a book is refused, it may be done without providing any comments. Publishers have 2 weeks to respond to the requested rewrites. According to the new standards, the publishers now have a right to contest the decision if their book has been refused.
7. The Ministry of Education issues a purchase order for the selected and approved books.
8. Books are ordered in subsequent years by the regional delegations.
9. Books are printed and distributed by publishers or through private intermediaries to retailers.

Source: Ministry of Education

From year to year, schools are required to report the number of books to be replaced. For financial planning reasons, the government estimates the purchase of 30% of the books per year, which amounts to about 200,000 copies per year, per title. This order is filtered up through the provincial authorities to the central level, which issues the purchase order. Publishers deliver to the retailers, and schools purchase the textbooks from the retailers using funds provided by AMAS.

Private schools are allowed more flexibility in choice of textbooks and supplementary materials, and many of the supplemental materials on the market, such as handwriting workbooks or alphabet books, are purchased by the private school market based on marketing work done by publishers to the schools. According to interviews for this study, the Ministry of Education sees it as problematic that publishers can deal directly with schools, since this can create opportunities for unscrupulous practices, or purchase contracts based on decisions other than quality and value. This direct marketing is forbidden in the public school sector. (There is no report of such corruption but the concern is that the potential is there if publishers market directly to schools.)

The price of textbooks is first set by a committee presided over by the *Secrétariat Général du Gouvernement* (in charge of the *Caisse de Compensation*³⁶ and other public subsidies), and the publishers must make a book that fits in that price range (depending on the grade and publishers). According to the President of the Publishers Association (*Association des*

³⁶ The *Caisse de Compensation* is the public institution in charge of public subsidies to basic goods, such as bread and sugar. It is currently under reform based on International Monetary Fund recommendations.

Editeurs, mentioned above) reacting to a report from *Conseil de la Concurrence* in 2010,³⁷ textbook prices are fixed as other goods, although they are not supported by the *Caisse de Compensation*.³⁸ Furthermore, this fixed price—between 14 and 23 dirhams (see **Exhibit 19**)—has not changed since 2002, despite changes in costs of raw materials (paper, ink, electricity, etc.) and despite laws (n° 06-99) that stipulate that the fixed prices should have ended in 2006 and that Article 44 of the 2002 *Cahier de Charges* suggests that prices should have been allowed to adjust as of the second print run.

Exhibit 19: Data on textbooks, by publisher and grade

Grade	Textbook name	Publisher	Price in MAD	Number of pages	Number of images	Workbook
1	Al Mufiid	Dar Attakafa	14.8	146	582	Yes
1	Kitaabii	Librairie Papeterie Nationale	15.15	159	326	Yes
2	Kitaabii	Librairie Papeterie Nationale	17.8	175	314	No
2	Fii riHaab	Top Edition (Librairie Essalam, Al Jadida et Dar Al Alamyia Lil Kitab)	17.8	159	212	No
3	Murchidi	Afrique Orient	17.8	175	255	No
3	Murchidi	Afrique Orient	23.05	222	287	No
3	Al Mufiid	Dar Attakafa	23.05	223	279	No

Source: Authors. Note: All books use the same paper quality (80g/m2) and binding type.

According to the Ministry of Education’s 2005 publication on textbook reform, the math Grade 1 to 3 textbooks are less expensive (10-14 dirhams) than the Arabic books mentioned in the table above.

3.2 Content and print specifications

Prior to 2002, there was only one choice of Arabic language textbook per grade level in primary schools. Publishers were only called upon (through competitive bidding) to print and distribute the books. The liberalization of the sector resulted in a competitive process where 4 different publishers emerged to produce the Arabic language textbooks used in Moroccan primary schools today (see **Exhibit 7**, above). These textbooks are the same ones that have been used since 2003, developed on the basis of textbook specifications written in 2002.³⁹ In 2010, after the publication of a report by the *Conseil de la Concurrence*, the former Prime Minister issued a memo (January 7, 2010) that requested changes to the textbook development process including the following:

³⁷ A committee established by the Ministry of the Economy to study competitiveness in the textbook sector. The memo issued by the Prime Minister (Ibas El Fassi) to the Ministry of Education reports the final decision, number 03-01-10, related to the findings of this committee.

³⁸ <http://www.leconomiste.com/article/marche-du-livre-scolaire-les-veritables-dysfonctionnementsbripar-ahmed-filali-ansari-preside>

³⁹ The authors obtained a hard copy in Arabic, which was translated for the purposes of the study, but is not otherwise available online.

- Textbook production should respect competitive market principles among authors and publishers.
- The process should allow new competitors to enter the market through renewing the textbooks.
- Textbooks specifications should be more detailed.
- Publishers should be given more time to produce textbooks (10 to 14 months instead of 3 to 4 allowed under the previous guidelines).
- The textbook selection committee should be reorganized.
- The process should allow 4 to 8 months for the textbook review process.
- Reports should be sent to publishers with feedback on the review process.
- An appeals process for publishers whose textbooks are refused should be implemented.
- Schools should be allowed to choose their textbooks.
- The price of textbooks should be regulated.
- One year should be allotted for piloting the textbooks in schools.

The previous studies by RTI in 2014 discussed some of the limitations of the 2002 specifications document, but found the following, essentially:

- Most instructions to bidders focus on technical aspects (font, paper type, size, etc.) and on thematic content to be included, such as Islamic values and nationalist identity.
- They are very limited in terms of pedagogical instructions related to the fundamental components of reading or instructional approach to be used.
- Bidders are not required to describe or justify their pedagogical approach, and there are no minimum qualifications for authors.

The 2011 revised specifications⁴⁰ are more detailed, and contain official instructions for a distribution system and textbook provision mechanism under public funding (through the *One Million Schoolbags* program). A comparison of the content of the two specifications is provided in *Exhibit 20*, below. As shown in this table, there is still no specific mention of instructional sequence or content related specifically to learning to read in Arabic in 2011 (i.e., sequence of letters, list of vocabulary, pedagogical approach, minimum standards for text difficulty, and sentence or word length or assessment strategies.) Since the Arabic language textbooks have not been renewed since 2003, these new specifications have not yet been implemented in this subject area.

⁴⁰ Available online at: <http://www.men.gov.ma/ucrp/Lists/Pages/dc111017.aspx>, in Arabic only.

Exhibit 20: Comparison of 2002 and 2011 textbook specifications

Design element	2002	2011
Font size	Unspecified	Unspecified
Content	19 criteria related values, etc.	Same criteria + values of tolerance, respect of differences. Website references limited to national university, research centers, and national institutions
Number of pages	Minimum number set	Number specified for each grade from 152 to 240
Gender issues	No criteria	Many criteria including inclusion of women’s creative contribution to national development
Timeline	3–4 months	14–18 months

Source: Authors, from review of both documents

The specifications document is not seen as a strict contractual obligation, but rather it constitutes guidelines that intentionally allow a certain amount of flexibility for the publishers (contrary to what the publishers think is a very restrictive set of requirements). On the other hand, Ministry officials recognize that this flexibility makes it possible for publishers to sometimes still obtain a share of the market for books even if they do not produce everything stipulated in the specifications document. The 2014 Curriculum Analysis report from RTI (2014a, updated in English in 2015) included a detailed table comparing the textbooks to the requirements of the specifications. Therefore, there is some contradiction in the perceptions between publishers/authors and the Ministry of Education.

3.3 Origination

Across subject areas and grade levels, the Ministry of Education acquires textbooks from dozens of local publishers. *Exhibit 21* below, shows the market share of different publishers in Morocco. A column has been added that indicates whether other types of children’s books in Arabic are available from this publisher (from a rapid inventory of Arabic language textbooks and other reading materials done for this study). According to several sources, between 2002 and 2007 the number of publishers and authors of official public school textbooks has increased substantially—from 17 to at least 36 publishers, and from 150 to more than 2,000 authors.⁴¹ *Annex 2* of this report provides more details on non-textbook publishers and markets.

Although the textbook market represents a large and recurrent market (i.e., with predictable annual sales), all of the textbook publishers also work in other markets, as described here:

- **Afrique Orient**, a family-owned business, is the publisher of the *Murchidi* series since 2004; however, as shown in *Exhibit 19*, above, they produce only Grade 2 and 3 books, because their Grade 1 book was not approved. They also publish children’s books in French and novels for adults in French and Arabic, at a total of about 100 titles per year in a variety of subject areas. The company is both publisher and printer.

⁴¹ <http://www.lavieeco.com/news/societe/manuels-scolaires-6-ans-de-reforme-mais-encore-des-imperfections-13638.html> and Ministry of Education.

The Chief Executive Officer is also the Vice President of the Publishers Association. They reprint copies of the same textbook each year based on the order from the government. Although they have printing facilities, they outsource textbook printing (about 200,000 copies per year) to another printer through a service contract. Their purchase contract with the government for textbook reprints is renewed on an annual basis.

- **Top Edition** is a joint venture of two publishers that produce one of the Grade 2 Arabic textbooks (*Fii riHaab*). They also produce supplementary materials. Because of the price of printing and because there are few well equipped printers in Morocco, they send part of their production abroad (Lebanon) for printing.
- **Librairie Papeterie Nationale** is publisher of the *Kitaabii* series of textbooks. They are a subsidiary of Hachette (France) and publish and distribute textbooks across subject areas and grade levels. They have a wide range of textbooks, teacher’s guides, and reference materials for reading in preschool and primary school, but mostly focus on French language (for example, teaching guides for using big books in classrooms or for developing phonemic awareness skills.) They have some books that focus on Arabic at the preschool level, but these are used primarily in private schools and are also sold in Algeria.⁴²
- **Dar Attaqafa** is the publisher of the *Al Muftiid* series. The authors could not reach this publisher for an interview or otherwise obtain any kind of catalogue or description of their services.

Exhibit 21: Share of Moroccan textbook market, by publisher

N°	Publisher	Number of textbooks				
		Primary education	Middle school	High school	%	Sup.
1	Dar Al Alamia Lil Kitab Librairie Assalam al Jadida Librairie Patrimoine Arab	6	9	26	10.8%	
2	Société Al Jadida Dar Attaqafa	12	7	8	7%	Y
3	Top Editions	2	3	18	6%	Y
4	Dar Nachr Al Maarifa	7	5	10	5.8%	
5	Nadia Edition	2	6	14	5.8%	
6	Afrique Orient	4	3	11	4.7%	Y
7	Imprimerie Al Maarif Al Jadida	7	4	7	4.7%	
8	Dar Arrachad Al Hadita	6	3	8	4.5%	
9	Librairie Papeterie National	11	5	1	4.5%	Y

⁴² See catalogues: http://www.editions-hachette-livre-international.com/wp-content/uploads/2013/pdf/Catalogue_HLI_2014_Monde_Arabe.pdf for Arabic language books, and http://www.lpn.ma/cat_pedagogie.php for an example of some teaching guides.

*Research on Reading in Morocco–Analysis of
Textbook Procurement Chain and Market for Supplemental Reading Materials*

N°	Publisher	Number of textbooks				
		Primary education	Middle school	High school	%	Sup.
10	Somagram	10	3	2	3.9%	Y
11	Librairie Al Maarif	5	4	5	3.7%	Y
12	Société d'édition et de distribution Al Madaress	4	6	4	3.7%	
13	Okad Editions	10	2	2	3.7%	
14	Imarssi	2	-	10	3.2%	
15	Librairie Al Ouma	6	2	3	2.9%	Y
16	Dar Nachr Elmaghribia	2	3	6	2.9%	
17	Librairie Al Madariss	4	3	3	2.6%	
18	Dar Al Maghribia Lil Kitab	3	5	2	2.6%	
19	Dar Attajdid	1	1	5	1.8%	
20	Imprimerie Annajah Al Jadida	3	1	3	1.8%	
21	Imprimerie Bni Yaznassen	-	-	6	1.6%	
22	Interkraf	-	2	4	1.6%	
23	Sochepress	5	1	-	1.6%	
24	Dar Arrissala d'édition et distribution	-	-	4	1%	Y
25	El Kasr Editions	-	2	2	1%	
26	Dar Ihyaa El Ouloum	-	3	1	1%	
27	Al Massar Edition	-	1	3	1%	
28	Al Atlassi Edition	1	-	2	0.8%	
29	Société Général du Livre- Somadil	-	2	1	0.8%	
30	Société Karbaoui de Distribution	1	-	2	0.8%	
31	Dar Ihyaa El Ouloum Al Hadita	-	-	2	0.5%	
32	Edit Consulting	-	-	2	0.5%	
33	Librairie Al Ouloum	-	-	1	0.3%	Y
34	Edisoft	1	-	-	0.3%	
35	Librairie Arrachad	1	-	-	0.3%	
36	Espace Edition	-	1	-	0.3%	
Total		116	87	178	100	

Source : Ministry of Education, Curriculum Division

Note: Column “Sup” indicates that this study found supplementary, child-focused books in Arabic on the market by this publisher. There are many other Moroccan publishers that produce children’s books that are not in this table. See **Annex 2**.

According to the World Bank’s 2014 report on textbook development, “Textbook authors require skills and knowledge that are different from other authors. These include knowledge of the subject matter, curriculum goals and skills to be achieved, pedagogy and different methods for teaching urban and rural students.”⁴³ Publishers in Morocco draw on a range of individuals to author textbooks, including teachers and inspectors (practicing and retired). Authors organize themselves into teams and enter into partnership with a publisher to develop the textbooks. A review of the textbooks suggests that men largely dominate the teams of authors, which could explain some of the criticism that textbooks lack appropriate gender representations.⁴⁴ The authors, as well as publishers, find that the specifications are very restrictive and do not leave much room for creativity or innovation, in particular because of the focus on themes and values. Sometimes authors are also involved in artistic design, whereas other times the publisher only requires content. There have been training programs for textbook authors, but none specific to Arabic reading. Hachette trains its authors through its own network of international experts. In 2012, the Ministry of Education organized a training program for textbook authors covering the following 6 issues:

1. Textbooks and skills development
2. Textbooks and planning the learning process
3. Development and evaluation of varied positions
4. Investment in digital resources in the new textbooks
5. Education on integrity in the new textbooks
6. Education on gender equality and human rights in the new textbooks

Authors receive fixed royalties of 8% per book printed, as established by the Ministry of Education in the specifications document. The 2011 textbook specifications provide some criteria for composition of the team, but there are no specific requirements beyond being an inspector or a teacher. It is important to note that when textbook authoring teams include practicing teachers or inspectors, those individuals are at the same time receiving a government salary, receiving a fee for development of the textbook, and subsequently receiving royalties on later sales of the book.

The prevailing instructional method for Arabic is the whole-language approach, which is described in the curriculum and textbook specifications as beginning with a given text (a story) which is “read” by pupils and teachers, then the teacher drills down to specific words and letters in the story before reconstructing the full story again. For authors and publishers, this means that the majority of their work is in writing and selecting those texts to use, and as mentioned previously, that choice is based more on thematic requirements than on

⁴³ Crabbe, R. A., Nyingi, M., & Abadzi, H. (2014).

⁴⁴ <http://www.lavieeco.com/news/societe/manuels-scolaires-6-ans-de-reforme-mais-encore-des-imperfections-13638.html> The textbook analysis commissioned by USAID in 2014 did not conclude that gender representations were highly problematic, but there were differences from one textbook to another and only a small sample of each textbook was analyzed. See the full report for details.

pedagogical value (for example, decodability of words, attention to word morphology, repetition, attention to basics such as phonemic awareness and letter sounds through rhyming stories or alliteration, etc.).

Despite the stated legal right to create and publish, there is nevertheless an implicit reflex and expectation that everything related to education is centralized in the Ministry of Education, and therefore the ministry controls content. This creates a disincentive to innovate in Arabic in the same way that publishers might innovate for the French market (e.g., comic books, adventure stories, fun or silly topics), since public schools are not truly free to choose materials. Moreover, because of the emphasis in the specifications on Islamic and nationalistic values, illustrations also tend to be very traditional and lacking in innovation; essentially, authors and publishers learned what was acceptable to the government in the past and continue to provide that same thing.

Previous RTI studies in Morocco concluded that there is a disconnect between “content knowledge,” “pedagogical knowledge,” and “pedagogical content knowledge.”⁴⁵ A significant amount of academic expertise exists in Arabic language content, and general teaching pedagogy, and even Arabic as a second language pedagogy. However, there is a lack of *pedagogical content knowledge* in teaching Arabic to young, first-time readers, whose home language may be quite different from MSA. This gap is reflected in the content of the textbooks and in the manner in which the textbook submissions are evaluated. Although the specific evaluation criteria are not available, it is telling that the evaluation committees are formed to address “language,” “design,” and “values,” but there is no specific committee related to pedagogical value. Perhaps the assumption is that all evaluation team members have that capacity, and sub-committees look at these three areas as well, but it would be important to determine on what basis the pedagogical value of the books is evaluated.

3.4 Selection and procurement

According to sources in the publishing industry, when publishers were invited to submit textbooks for consideration in 2003, they were given only 3 to 4 months to produce a full, print-ready proof (not with final binding, but all final content) for submission. This document was given to an evaluation committee who determined the final selection. The members of the evaluation committee were not made public, and apart from the specifications document, there were no evaluation criteria or procedures given to bidders (for example, if the final decision is made on the basis of a number of points earned, and if certain elements of the specifications carry more weight than others). Publishers did not have a chance to pilot or test the books, first because there was not enough time, but also because they were not given permission to work in schools with materials that were not pre-approved. They have also not been allowed to incorporate corrections or changes to the books over the years, based on feedback from usage. However, the Ministry of Education indicated that there were ambitions to pilot and evaluate any new textbooks in the future, either through piloting during the development phase or after implementation, but this apparently is among the reforms that have been suspended because of changes in management. For example, reforms linked to the new pedagogical approach, the delivery of in-service training to teachers, and the textbook revision process have been suspended. Therefore, since there has been no renewal of the

⁴⁵ RTI (2014b)

textbooks through competitive bidding since 2003, there has been no opportunity to use the new (2011) specifications, which were improved to address many of the issues of quality control and transparency. Furthermore, the choice of the textbooks—even among the existing textbooks—at school level has not been implemented; instead this happens through the provincial administration.

The procurement of textbooks is now made by AMAS, which also manages subsidies for other school inputs (transportation, school lunch, and conditional cash flow transfers). AMAS pays the schools, and the schools buy the textbooks directly from local bookstores or other distributors. While policy documents talk of the ability of schools to choose the textbooks themselves, in practice, there is an understanding that delegations must purchase equal quantities of the approved books. See more under “Distribution,” below.

Although from an external perspective the sector seems liberalized and competitive, internally, some Moroccan stakeholders describe it as an organized monopoly, given that out of all of the publishers producing books in Arabic there are only four who share the market for Arabic language school textbooks. Furthermore, many publishers are family-owned businesses that operate across the production chain (authoring, editing, printing, selling).

By internal or external standards, there are several things that stand out as contrary to a true competitive market, as follows:

- Prices are fixed, which does not allow bidders to compete on the basis of production efficiencies or knowledge of book production technologies and design.
- The market share is fixed/shared between editions, irrespective of quality or content; in this way, choice is only symbolic, since districts and schools are bound to purchase an equal amount of each textbook regardless of how well it enables effective teaching and learning in their classrooms.
- Authors receive royalties of 8% of the retail price of each textbook sold in recognition of their intellectual property of textbook content (while illustrators and other contributors do not). However, it is not clear whether they can claim intellectual property of all elements that make up textbook content (see section 2.1) and, in that case, if they could claim such high royalties (if any at all), in addition to their salary as civil servants.
- There has not been an update of the books in over 10 years, or an opportunity for new players to enter the market or introduce innovations.

3.5 Production (printing)

It is very difficult to itemize the costs of printing textbooks in Morocco—there are too many different considerations and sources would not always divulge actual costs. However, publishers indicate that the biggest expense is paper, which has to be imported (usually from Scandinavian countries or Brazil) and can account for up to 50 or 60% of the printing costs. There are no import duties on paper, but it is still common for some publishers to print books outside of Morocco (such as Spain or Lebanon) because printers in other countries serve large markets and have more modern printing machines that have been fully amortized, and can therefore print at much lower unit cost. Naturally, the unit costs also go down when print runs increase because the initial fixed costs of preparing the proofs and calibrating the machine are

spread over the total number of books printed. However, it is not any less expensive to reprint the same edition at a different point in time. So while the publishers have only profit each year they resell the same textbook (assuming the initial origination costs were recovered within the first few years), this is not the case for printers. For them there is some year-to-year variability in actual costs of printing the books. Some printers may also offer discounts if there is a guaranteed opportunity for future reprints. The blueTree Group, specialists in book production, suggest that a high-quality book (polyurethane perfect binding) should not have to exceed \$1.00 to \$1.50 USD per 160 A4 pages.⁴⁶ The sales price of Moroccan textbooks are slightly higher than this, see *Exhibit 19*.

According to various sources, the estimated profit shares for actors in the textbook chain in Morocco are: 8% of retail price for authors, in the form of royalties; 30% of retail price for booksellers (20% if distributed through *Librairie Nationale*); 30% for publishers; and the remainder for printers. This is in line with what is reported in other countries (see *Exhibit 10*, above) except that the printing costs, of at least one-third of the total costs, are much higher than expected. Recalling the discussion of copyright and royalties for textbook authors in section 1, Theoretical Framework, it is surprising that textbook authors in Morocco receive royalties year after year (but apparently illustrators do not), especially if they are already government employees (inspectors, teachers) and they are mostly following the instructions of the textbook specifications. The implication in terms of cost is not large, and therefore this particularity may not be of concern; however, it is worth questioning the rationale behind this requirement.

Publishers naturally must have a business incentive to enter the market; the publisher bears the cost and the risks⁴⁷ of developing textbooks upfront and so there must be a reliable anticipated return on investment. The current estimate of 200,000 books per year represents a sizeable recurrent market, but still, according to some publishers, the market has become uncertain since purchase contracts are only renewed year to year, and therefore this lack of projected revenue prevents them from investing in new technologies that could improve production processes. According to experience elsewhere, it is beneficial to review curriculum and update textbooks on a regular basis. This helps improve quality, while boosting the book industry through writing, publishing, printing, and distribution of new materials.⁴⁸ A steady cycle of replenishment, approximately every 4 years, for example, would allow private entities to anticipate demand, spread their costs over that period, and invest more because of stability in future demand. This ultimately lowers the unit price of books (where the price is not fixed) since fixed and recurrent costs can be spread over several years/total purchases rather than forcing publishers to earn their margin in the first year of publishing, which increases the price per unit.

On the one hand, publishers complain that without a clear forecast for book sales they cannot easily invest in better printing machines. On the other hand, there are no recurring costs for the annual reprints (which remain relatively stable, at about 200,000 books per year per publisher). The recycling of books, while justified for keeping total costs down, has other implications. Parents complain about the quality of materials since pupils directly write on

⁴⁶ blueTree Group. (Kenya report)

⁴⁷ Although certain printers claim that they bear the risk since they are the last ones to actually be paid in the chain, and payments may come months after books have been printed and distributed.

⁴⁸ blueTree Group (2013)

some of the textbooks (with exercises embedded), even though the book has not been issued formally to them.⁴⁹ School directors also have the added burden of managing the replacement process and determining which children get recycled versus new books. According to the procedures, school directors communicate their needs to the Delegation via informal channels rather than through one central education management information system (EMIS) or through the official pupils and school database (*Massar*). It was reported that some managers have developed their own tools (i.e., in Excel) rather than using a standardized process. Textbook reuse also creates a situation in which there is some additional demand for textbooks that would be purchased by parents who are not satisfied with the quality of the reused books provided by the school. One publisher reported that they actually print 30% more books than the initial order from the Ministry of Education for this reason.

3.6 Distribution, storage and replenishment

In the first year of the launch of the *One Million Schoolbags* program (see the Introduction), publishers were asked to distribute textbooks to the school directly (they did not have to pay the 30% margin to retailers, so that was economically advantageous for them). However, there were problems in distribution and claims from the local retailers that books did not arrive. Now schools buy textbooks with funds provided from AMAS through the AREF to the Delegation. In their contractual obligation, publishers must deliver the textbooks to the area indicated. If they cannot manage to deliver some textbooks, those textbooks are not paid for. A certain percentage of textbooks are also recycled from one year to the next to save money, but this has also been characterized as part of the educational values that the school intends to convey (e.g., solidarity, sustainable development). Schools are expected to make a report by May of each year indicating how many new books they will purchase. Approximately 30% of textbooks are purchased new each year, while 70% are reused. Therefore no child is issued a book that he or she will keep, although students are permitted to take the books home during the school year.

Morocco's distribution system relies on local booksellers. This is not unusual and has been highlighted as an effective mechanism in Kenya.⁵⁰ Such a system has helped to boost the distributors and local network. Although the Ministry of Education's data collection procedures do include both data on textbooks (but not the name or editor of each textbook) and data on enrollment per grade, which could be used to calculate each school's textbook-to-pupil ratio, the statistical yearbook does not include such information. These ratios are not used to check if publishers have actually distributed all the books they were contracted to provide. Schools can report to the local authority or to the AREF any problem with distribution. The publisher is then required to ship the textbooks in the next 48 hours. If they cannot, the contract will be voided for that publisher in that region.

⁴⁹ SOFRECO (2013). *Evaluation de mesures et de stratégies mises en œuvre dans le cadre du programme d'urgence pour l'éducation au Maroc* [Evaluation of strategic measures put in under the Emergency Education Program of Morocco]. Rapport Final [Final Report].

⁵⁰ blueTree Group (Kenya report)

Exhibit 22: Overview of textbook replenishment process

1. The AMAS makes an overall budget framework paper based on *Direction de la Stratégie et de la Prospective* forecast. This note serves as negotiations with the Finance Minister.
2. In March each year, AMAS communicates to publishers the number of textbooks to produce.
3. Schools make an inventory of textbooks needs. They have until July 15 to do so (based on 70% recycling of textbooks).
4. The delegations check the info received from schools.
5. The school directors, having identified the need for books, can order textbooks from local distributors (August or July).
6. In September before the school year starts, school directors receive textbooks (with the supervision of parents' associations)
7. Local representatives of the AMAS (at delegation level) sign contracts with the *Associations Ecole de la Réussite* (AER) for payment of funds
8. After clearance of the administrative file containing purchase order and proof of textbook delivery, funds pass from AMAS, to AREF, to delegations, and finally through the AER, when these associations have a clear legal status in the school. (Sometimes delegations pay distributors directly when no AER exists in the school.)

Source: Authors, from AMAS procurement guideline and interviews with the Ministry of Education

It is unlikely that any direct system of distribution (from the Ministry of Education to schools) would be any more cost-effective than the current system of distribution through local bookstores, even though a large share of costs currently goes to the distributors.

4. Conclusions and Recommendations

4.1 Summary of findings

The World Bank outlines six major challenges in textbook provision in client countries:⁵¹

1. High costs
2. Poor governance/corruption
3. Inadequate supply
4. Distribution problems
5. Poor planning
6. No policy framework

In the case of Morocco, none of these issues is a serious concern, though the most recent policy framework for textbook development (*Cahier des Charges*) is not applied. If anything, the system suffers only from lack of quality control and mechanisms for continuous improvement—possibly considered part of point 5 above, but also due to a lack of a clear textbook policy (point 6). There is not one clear policy that outlines the government's vision for

- textbook ratios;

⁵¹ Crabbe, R., Nyingi, M., Abadzi, H. (2014).

- minimum standards for textbook and materials “packages” (including supplemental materials);
- whether textbooks should be free or not;
- mechanisms of choice of textbook and supplementary materials at the school level;
- management of textbooks and supplementary materials at the school and classroom level (including school or classroom libraries);
- quality control and evaluation of textbooks; and
- textbook review and renewal.

There are many documents that describe elements of policies related to textbooks, from the National Charter to the 2012 *Cahier de Charges* and the AMAS procurement and distribution guideline. However, it is unclear which of these policies are actually being adopted and implemented given changes in the administration and suspension of some reforms. Many of the reforms being made in 2010 were positive with regards to textbook quality, and the specifications have been improved, but until these are actually implemented through another round of competitive bidding and textbook updating, they are not actually policy. There is not enough quality control through design specifications that focus on reading content, transparent evaluation procedures, pilot testing and feedback from users, or free market choice (which would allow users to choose the books they determine are the best, and order only those books year after year).

The cost of textbooks at the primary level is reasonable at 18 dirhams/US\$1.80, at least from the buyer’s perspective—the publishers may find it too low. It is slightly higher than some estimates from other countries. There is steady funding from a combination of financial partners that ensures that books are purchased and renewed each year. The production process benefits from tax exemption on paper imports, although paper remains the highest cost item. There is no evidence of serious corruption, although the system could be understood to be artificially controlled in order to provide the same market share year after year to the same publishers. Nevertheless, the supply of textbooks is good and there is no evidence that children are lacking access to the required Arabic language textbooks. It is important to note that there is no formal monitoring of textbook distribution to ensure that this is the case. The central government relies on school-level reporting only with the support of delegations. Furthermore, the budget does not cover workbooks for children, which are used and authorized only in private schools and purchased by parents or schools. Suitable workbooks and other low-cost supplementary materials exist in Morocco (including from the current textbook publishers) that could be used by pupils in and out of schools. More generally, except textbooks, there are few available materials for children to read in and out of school and no policy nor public budget for developing school or classroom libraries.

There is significant capacity in the Moroccan book sector, from publishing houses to authors and printers. They are organized in associations and networks, which provide feasible mechanisms for reaching these stakeholders with training programs. But these same networks also have considerable leverage with the Moroccan administration, and the current incentives favor maintaining the status quo, which for the past 10 years has provided a constant source of recurrent profit margin. While textbook authorship conforms to best practice by including a range of curricular specialists, teachers, and content experts, the “content” expertise doesn’t

yet exist in terms of individuals who know how children learn how to read in Arabic. No author training was specifically organized on reading in Arabic. Alternatively, if it exists, the prevailing instructional approach that is outlined in the textbook specifications is the whole-language method (or mixed), and apparently no authors would take a chance on proposing something that falls outside of that scope. There are slightly different approaches in the textbooks, but as the choice of the textbooks is made at Delegation level, teachers are not empowered to choose the approach that would best fit their context or level of comfort and training.

There is a very good and efficient network for distribution. There are bookstores all over the country, many of which stay in business only because of the schoolbook market. For some booksellers, the textbook market accounts for 80% of their business, but it is all concentrated at the beginning of the school year. The association of publishers also serves a role in ensuring that the distribution of books is done efficiently. There is no obvious reason to change this system of distribution; however, since some of the publishing houses also have subsidiary printing and distribution channels, if the distribution of approved textbook publishers changes it may have an impact on the effectiveness of the distribution. Incidentally, the Ministry of Culture has a different distribution system for supplementary materials, which circumvents the bookstores, while the Directorate of Non-formal education has a different publishing strategy (it develops textbooks internally and contracts only the printing). It would be important to compare and contrast these different experiences to understand more about the strengths and weaknesses of the different systems, and any advantage each stakeholder might gain from combining efforts.

Thus to conclude, the main bottleneck is the **quality control process** and the stalling of reform efforts at the level of the government that has resulted in no changes or renewal of the book production system in a decade. If the reform efforts are put back on track and a new request for textbooks were to be issued under the improved textbook specifications, there would be no shortage of willing and able publishers in Morocco. However, in addition to improving the specifications to focus on critical aspects of reading instruction, potential authors would benefit from training on how to develop effective Arabic reading textbooks.

The recommendations that follow will therefore focus on what some of the tradeoffs might be in launching another round of textbook renewal and other policy reforms that could have an impact on the vision stated earlier: that a national book provision policy should guarantee barrier-free, equitable access to high-quality, research-based, and cost-effective textbooks for each student (and corresponding teaching guides for teachers), and potentially workbooks or supplementary materials. Some of the recommendations below can be applied more broadly to the whole sector (such as textbook policy), while others are more specific to the focus of this research, which is Arabic language teaching and learning materials. The scenarios are designed to be illustrative of choices the government could make based on the key recommendations, and pros and cons of each. These are not necessarily mutually independent though, and there may be ways to combine elements of several scenarios into a model unique to Morocco.

4.2 Recommendations

1. Textbook policy

As mentioned in section 3.1, while elements of policies and procedures related to the textbook chain are documented in various places, there is no single “go-to” reference document on textbook policy. It would be worthwhile for the Government of Morocco to develop a textbook policy, in one clear document that can be shared with a range of stakeholders and that clearly outlines ambitions and minimum standards for textbook quality, provision, and use in classrooms. This policy should outline enforceable standards, and also indicate how those will be enforced through monitoring and evaluation efforts. The policy should be linked to and outline a broader schedule of curricular reviews and textbook renewals, as well as long-term plans for financing books. The policy should also state ambitions and minimum standards for other types of reading materials that may or should be found in classrooms, including: teacher’s guides, workbooks, exercise books, (leveled and read-aloud) reading books, big books, alphabet books, atlases, poetry and rhyming books or posters, grammar books, reference books (dictionaries, non-fiction reference anthologies), and digital materials and the role of school or classroom libraries.⁵² The policy should specify clearly what “choice” at the school level really means, including choice of textbook but also use of supplementary materials such as a posters, workbooks, exercise books, cards, etc. What level of approval is needed for instructional materials? Can parents or teachers finance their own materials if they wish? Can teachers develop and use their own materials? Textbook policy can also touch on inter-ministerial concerns including exoneration of import duties on raw materials such as paper, new printing technologies, and books; linkages between formal and non-formal education sector textbooks; and supplemental materials currently falling under the Ministry of Culture.

2. The minimum profile for reading instructional materials

As mentioned above, the policy should outline “ambitions and minimum standards” for book provision in the classroom. This is recognizing that while an abundance of varied materials is ideal when learning to read, financial constraints on centrally funded materials may limit the range of materials that government can guarantee.

The UK Department for International Development (DFID) suggests that “adequate supply is usually assumed to be a minimum of one textbook per three students, and at primary level enough reading books so that every child has the opportunity to read at least one new book every week.”⁵³ However, in countries that can afford it, one textbook per child is the ideal, allowing children to take books home. As described earlier, the research is strong in favor of one-to-one textbook ratios, but these do not imply ownership of textbooks. There is value in allowing books to be taken home and encouraging children to feel comfortable engaging with the textbook frequently. In the context of Morocco, where the time spent on individual reading in school and after school is limited, allowing workbooks in schools, or more books in general, has a high likelihood of positively affecting student outcomes.

⁵² This level of detail would be specific to different subject areas, but the textbook policy would concern all textbooks.

⁵³ DFID (2011)

Depending on the content and purpose of the textbook, the specifications could be revised to require more durability and longevity in the textbook, but then accompany this with a low-cost workbook that can be “owned” by the children and replenished every year. It is possible to allow exercise books in public schools or even to purchase exercise books on public funds (since some exercise books are aligned with textbooks as part of a collection). A possible scenario for a minimum package would, therefore, be

- a durable textbook⁵⁴ that is used in the classroom only (may be shared by two students, if needed, but not ideal);
- a teacher’s guide that provides instructions for using the textbook and workbook effectively; and
- a disposable workbook for each child with increasingly leveled text appropriate for the grade level and that includes space for writing.

Ideally there would also be classroom libraries with low-cost books that can be accessed by children every day at school and at home. Such books can be sourced independently or through organized government programs.

This idea is developed in **Scenario 1: Additional exercise book authorized or purchased in schools**. A scenario for increasing access to other reading books in the school through classroom or school libraries is developed in **Scenario 5: Purchase of children’s books at school level**. The scenarios are presented in *Annex 1*.

3. Textbook choice

Section 2.3 described some of the tradeoffs involved in providing or limiting choice of textbooks. For Morocco, where significant publishing capacity exists, and important policy documents such as the National Charter expect a competitive market, there is no strong argument for a return to a centralized, sole-source model of textbooks. The private sector should continue to publish textbooks and schools should have a choice of books. However, that choice needs to be from among several equally high-quality, but differentiated, textbooks, and it should be an authentic and informed choice.

School-level choice of textbooks—which was a preference expressed by many teachers during previous RTI studies and was recommended by the *Conseil de Concurrence* (2010) and former Prime Minister (2010)—would add complexity to the existing planning and procurement process because it would require school heads to make their choice well in advance, to allow publishers sufficient time to plan the printing and delivery, and then stick with it for 3–4 years to maintain continuity across grades and ability to recycle textbooks year after year—and to give publishers enough of a purchase forecast to keep costs down. There would be no change in public budget programming since the price of the textbooks does not vary according to publisher and the total number of books purchased is not changing, unless the government removes the fixed price requirement. This may be necessary if publishers are not guaranteed a certain proportion of the market. The choice of textbooks at school level

⁵⁴ Throughout the recommendations and scenarios section, it should be understood that a “textbook” is a “collection” or “set” of books that spans a series of grade levels (1–2, 3–4, or 1–3 and 4–6, or 1, 2–3, 4–5, according to the curriculum). The same publisher should be preparing a series of instruction that is accepted or refused as a set to avoid the situation of changing methods, sequence, and style from one year to the next.

would provoke more competition among publishers by breaking the current, controlled even market split, and move forward liberalization of the textbook market. The decision of whether to choose textbooks at school level is a trade-off between pedagogical and logistics parameters. The key question is whether there is sufficient variation between teaching methods and content across textbooks, and whether teachers have the capacity to make an informed choice among those different books. Some elements of this idea are developed in **Scenario 3: Differentiate textbooks based on content or method and allow free selection based on teacher input.**

Given the progress made since 2002 in establishing a vibrant publishing sector and efficient distribution systems, there is no reason to return to a single-source model, unless it is for quality control. One scenario may be that a basic, first edition reading primer is developed and piloted centrally, and if successful scaled up for a few years. But the competitive marketplace would still be used to purchase complementary, required, materials such as reading books that provide additional lessons and opportunities for reading practice based on values and themes of the curriculum. In fact, the current textbooks could be maintained and used for the purpose of the thematic values (to be determined by the Government of Morocco based on a renewed evaluation of the content), but they must be associated with basic reading instructional supports that have no other content objectives besides teaching reading. This means that the content of the lessons is based on language characteristics that are common to the Arabic language (sequence of introducing letters, frequent vocabulary words, repetition, phonemic awareness, attention to word roots, and learning to decode, etc.) In this scenario, the government develops and owns the copyright to that material once developed, so there are costs saved on royalties and the ability to reproduce materials freely (in print and digital forms). This centralized, sole-source model could eventually be phased out when the reading primer has been tested and fine tuned, through a competitive bidding process for a subsequent version of the reading primer.

This idea is developed in **Scenario 2: One additional simplified reading instruction textbook produced by the government.**

4. Reuse and replenishment

Regardless of the model chosen (single- or multiple-choice) for textbook origination, a decision must be made about whether every child has a textbook, if textbooks are shared, and if children may take textbooks home. Even in the best of cases, children may still misuse textbooks designed to be durable and reused year after year, so some replenishment is needed each year.

Rather than requiring a 30% rate of replenishment each year, replenishment should be based on criteria for quality and usability of the books, so that no child is left with a book in poor condition. The tradeoff may be that it will require additional effort to systematically collect data on the condition of books and therefore the quantity to be replaced. If textbooks are not meant to be given to children then they should not include exercises that imply that the child can write in the books. The teacher's guide may instead show a model exercise, and children can use low-cost exercise books for writing exercises (it should first be very clear what the pedagogical objective of the writing is, of course). Schools and children should be provided guidance on how to keep books in good shape. If books are kept in good condition year after

year, and less than 30% need to be replaced, then there could be rebates to the school for the cost savings, or funds directed to supplemental materials such as classroom library books, for example. However, a potential risk is that in trying to keep textbooks in good condition, schools fail to use the books at all, and they keep them locked up and out of the hands of children. The national inspectorate system should have mechanisms in place for monitoring textbook delivery and use.

5. Innovation and experimentation

Any of the above recommendations depends on knowing first what works in terms of textbook content and required materials for teaching and learning. What doesn't work is apparent—the current combination of textbooks and teacher's guides and the way they are used in the classroom.⁵⁵ But a shift in what direction will achieve results? From the previous research done by RTI, it seems likely that simplification of textbook content will go a long way in helping teachers teach and students to learn. But research and experimentation should be done to learn what works for Moroccan children in a variety of contexts.

The authors heard from informants many times that the Arabic language is simply not yet seen as something that is “fun” or for children. It has a very academic and intellectual history, and there are no authors who know how to write stories for children in Arabic, much less decodable stories. It is also so closely intertwined with the notion of Islamic values and nationalism that it seems inherently bound by a conservative style—which wouldn't be the case for other languages such as French. However, there are publishers that are eager to introduce more innovative and child-friendly styles into the textbooks and supplemental materials—and some who already do in the case of supplemental materials. The only bottleneck is that the specifications—explicitly as well as implicitly—are not designed to reward innovation.

The Ministry of Education should work to promote a culture of formative and impact evaluation of materials. Deliberately requesting and selecting textbooks with distinct—yet evidence-based and pedagogically sound—methods, and rigorously evaluating the way they are used in the classroom and the results, provides this opportunity. For example, provide evidence of the debate between whole-language and phonics approaches by testing them. See what happens when children are provided with fun, decodable books in a classroom library.

One possible way to accomplish this is to continue to promote a liberalized, multiple-source textbook selection process based on private-sector publishers, but request different types of books. For example, differentiate based on socio-demographic needs, or by pedagogical method. Publishers can choose to specialize in one area or submit a bid for all of the different areas. This would also provide the basis for more choice at the school level (see point 3 above).

This idea is developed in **Scenario 3: Differentiate textbooks based on content or method and allow free selection based on teacher input.**

⁵⁵ That is not to imply that the poor outcomes are due only to textbooks—there are of course many factors at work. But changes in textbook content can overcome at least one of the limitations, and potentially others (such as parental involvement after school, or time on task, or teacher self-confidence).

6. Evaluation and selection

The textbook selection process would benefit from more transparency in the evaluation criteria and the selection process. To avoid the loopholes in the textbook specifications, the selection committee should, at minimum, provide the detailed evaluation criteria and scoring methods in advance (in the *Cahier de Charges*) with clear and objective measurements. For example, a weighted scoring system would indicate how many points each criterion is worth, allocating more to the elements that are non-negotiable and fewer points for those that are open to some flexibility. This method would also help reduce any potential corruption since the final selection would be based on observable and verifiable decisions.

Another possibility, still with the ultimate objective of improving the quality of textbooks, is to design a selection process in phases, so publishers only develop certain elements first and not the entire book. This means less risk for publishers and potentially better quality through dialogue and partnership. While it is true that it would be more efficient if publishers did not have to develop the entire textbook to be selected for the shortlist, the initial selection by the Ministry of Education should be based on more than a chapter.

A more comprehensive proposal could include the following:

- Methodological approach
- Full list of lessons, explaining how this proposal adheres to the curriculum and is based on evidence for the best scope and sequence to acquire literacy skills in Arabic
- Materials for a full cycle of primary school, i.e., Grades 1–3 or Grades 4–6
- Model units for all grades, and ideally at least two units for each semester.

If publishers were also allowed to compete based on a financial offer as well as a technical offer, this would reduce the incentive to cut corners to remain within the fixed price. More research should be done to determine what the “real” price of a high-quality book would be if the price limit were lifted.

This idea is developed in **Scenario 4: Revision of the textbook development and selection process.**

A final element to consider in the selection and procurement of textbooks and supplementary materials is whether to open competition to international bidders or to purchase off-the-shelf materials from other countries, potentially for supplementary materials only if not for the actual textbooks as well. The Ministry of Education could request samples directly or hold an international children’s book fair during which products are evaluated for their pedagogical quality; short-listed publishers would be requested to provide a financial quote for a given order. This type of model was used in Mexico for some supplementary materials. Each year the government changed the focus of public procurement—first oral tradition, then regional initiatives, etc. This forces publishers to think of developing certain types of titles that are missing and to identify books they know they need but are in short supply. If they issue the call for offers or proposals early enough, they will give people enough time to develop good books. Clearly, a risk in allowing international competition is that Moroccan publishers may never be cost-competitive with other countries having already larger markets and newer technologies; yet, the government could regulate price, as was the case in Mexico and in other countries that have adapted the Mexican model, like Colombia. Exploring mutually beneficial

partnerships in this area would be important, as would be further exploring how to improve printing capacity in Morocco through newer technologies or other subsidies to paper imports.

4.3 Concluding words

Cost is not the only consideration. When discussing costs, the Government of Morocco must think about the long-term costs of children not learning to read in the early grades. Is a 10dh per child increase in the public budget for reading materials more or less than the cost of students who repeat or who dropout and then reenter through the non-formal system, or who never make it to secondary school and are unemployed, etc.? Such simulations are outside the scope of this study but are a necessary complementary analysis.

All decisions and scenarios must consider first and foremost the skills that children should be taught grade by grade. This may require first a curriculum review and revision that explicitly maps the scope and sequence for acquisition of literacy skills in Arabic, at least for the first few grades, taking into consideration the preschool curriculum and the fact that not all children benefit from those skills. What are the skills a child should have on the first day of Grade 1? And on the last day? And subsequently through Grade 3? This level of detail is not yet spelled out in the curriculum, and therefore any revision of textbooks, textbook policy, reading materials, supplementary materials policy, etc., must align with an ambitious yet developmentally appropriate scope and sequence of instruction.

Training is going to be a major factor related to success, regardless of the scenario or combination of scenarios that are chosen (or if no changes are made). In the interim, Moroccan teachers need training that focuses on fundamentals of reading instruction and how to take any material with any content and adapt that to introducing basic oral and communicative understanding of the language, along with basic reading skills, in a systematic and developmentally appropriate way. If Morocco starts to introduce variation in materials through more choice and more supply of textbooks and supplementary reading materials, teachers should know how to adapt to these new materials, and they need to feel confident taking risks doing things differently and, especially, monitoring student progress in response to instructional changes.

Annex 1: Reform Scenarios

SCENARIO 1: ADDITIONAL EXERCISE BOOK AUTHORIZED OR PURCHASED IN SCHOOLS

Objective/rationale:

- Introduce basic, evidence-based fundamental skills practice for early reading to complement the textbooks and help close the gap for children who did not attend preschool or who lack basic skills.
- Ownership of these workbooks would provide more time on task (reading and writing) in school for students and teachers, and out of school for pupils and parent involvement, which may also impact motivation and interest in reading.
- Allowing supplementary materials in the public schools (which is currently done in private schools) would improve equity in the system.

Parameters and steps:

1. The current textbooks will continue to be used for at least one more school year, but with the recognition that they are too difficult and do not provide enough basic letter and sound/syllable level guidance to children to help them become independent readers. After one year, the textbooks could be improved, but still aimed at a level focused mainly on interesting stories, thematic topics, strategies for building communicative competency (orally), and comprehension strategies (written and oral).
2. Basic skills development workbooks would be introduced (1:1 ratio, unless a child demonstrates high pre-existing skills) to help build the fundamental skills that are currently lacking in the textbooks: practice writing letters and recognizing letter sounds, reading syllables, decodable short words, lists of key vocabulary words associated with pictures, lists of frequent “sight” vocabulary words, etc.
3. In the short term, there are existing, low-cost exercise books aligned to the current textbook content and the curriculum that could be approved directly through an unlimited threshold selection process.⁵⁶ In the long term, new competitive processes would be used to request and source these workbooks as an integral part of the textbook “package” (textbook + teacher’s guide + workbook).
4. Based on the current price of exercise books and price of supplementary materials and given that the exercise books would be purchased on a large scale, a reasonable price would be 10MAD per workbook (about half the price of Grade 1 textbooks and lowest cost of some sample materials).
5. If the textbooks could be maintained longer in good condition, the cost of the exercise books may be offset by reduced annual replenishment purchases.

Opportunities	Risks
<ul style="list-style-type: none"> • Pupils have more time and support to practice reading/writing in and out of school, involving 	<ul style="list-style-type: none"> • Needs a specification and selection process. • Might need teacher training.

⁵⁶ Any books meeting a minimum quality criteria would be approved—there is no set limit.

<p>parents and siblings.</p> <ul style="list-style-type: none"> • Teachers have supplementary materials and can spend more time for individual teaching/remediation. • Teachers are better equipped in terms of developmentally appropriate activities for children. • Time spent working independently in a workbook allows the teacher to work directly with other children, providing an opportunity to differentiate • Inspectors can better trace/monitor teacher's activities because there is a record of what children have done.⁵⁷ • Potentially more opportunities for retail sales and entry of new publishers into the market with smaller (less risky) publications. • Textbooks last longer because children don't try to write in them. 	<ul style="list-style-type: none"> • Will probably result in higher costs; if replenishment is reduced, the cost per unit of the textbooks may have to increase, or printers need to print large quantities but keep the rest in storage until orders are filled to maintain the unit cost.
<p>Costs: Between MAD 26 (if unit price is 15 MAD) and 30 million (actual price)</p>	

SCENARIO 2: ONE ADDITIONAL SIMPLIFIED READING INSTRUCTION TEXTBOOK PRODUCED BY THE GOVERNMENT

Objective:

- Quickly introduce evidence-based practices in early grade reading in Arabic
- Evaluate the effect of these materials in a controlled manner
- Build capacity in the Ministry of Education to understand quality standards for early grade reading materials

Parameters and steps:

1. Continue to procure textbooks from publishers; in the short term, continue to use the same textbooks, but longer term improve the current textbooks through competitive processes using a renewed (2012 with further improvements) *Cahier de Charges*.
2. These textbooks can continue to be focused on thematic content, values, and core subject matter, and can continue to use a model of text + exercises that focus on reading skills, vocabulary development, and comprehension strategies.
3. A central Ministry of Education unit produces, with support of Arabic reading experts and people with publishing know-how, a simplified reading instruction textbook (a “primer,” or series of level 1, level 2, level 3 primers, etc.) that focuses on fundamental concepts of reading in a leveled, sequenced manner. This becomes standard for all schools after initial pilot testing and evaluation. The content of this primer is distinguished from the textbooks because it is based on language development needs and not on thematic content, but it is more detailed in scope and explicit sequence than the workbooks described in Scenario 1.
4. The primer would be provided at a one-to-one ratio, with replenishment based on needs (i.e., it would not be treated as a consumable, like the exercise books).

⁵⁷ Past EGRA studies by RTI, including the 2009 study in Doukkala Abda, show a high correlation between the number of pages marked by the teacher and children's reading performance

5. The primer would be continuously evaluated during implementation, piloting in a limited but representative number of schools nationwide, revised year to year as necessary, and then finalized based on the results of this formative piloting period, which may last 3 years.
6. Although the actual costs would have to be determined based on actual numbers, it should be possible to produce this primer for about MAD10 per unit (for example, this is the price of the Grade 1 math textbook price, and the cost of some supplementary materials on the market; MAD 18 is the cost of Grade 1 textbooks, all using colors; MAD 12 is the lowest cost for a Grade 1 workbook). The primers would be produced on large scale and therefore unit costs would go down).
7. The effect on the bottom line budget may be offset by carefully selecting the printing specifications of textbooks to increase cost-effectiveness without major sacrifices in quality. Additionally, the government should consider carefully whether to involve booksellers in distribution, or to negotiate a reduced commission, given that booksellers would not be contributing to promote the demand for textbooks, but would only be offering a logistics and transportation service. Finally, government and publishers should carefully consider whether to continue paying such high royalty rates to textbook writers, or to reduce royalties substantially (to 2%, for example) or altogether.
8. After a period of time where the primer method has been reviewed, modified, and proven effective, the model can be used as the basis for renewed competitive bidding in order to phase out of the centralized model.

Opportunities	Risks
<ul style="list-style-type: none"> • Quickest way to introduce change in the system • Can introduce evidence-based practice independently of thematic content • Benefit from economies of scale in printing and ability to revise year to year • Provides the opportunity for independent, objective evaluation of the content and methods since there is no private interest at stake 	<ul style="list-style-type: none"> • May require allocating additional time in the curriculum, so that the primer is used during a “reading instruction” lesson, and the textbook is used during an “Arabic language” lesson. • There may be some reduced demand for private sector materials initially, but with the chance of much larger sales in the future. • Will require a significant amount of teacher training, or very clear, scripted teacher’s guide initially. • At face value, it may seem like a return to previous, centralized policies that go against the spirit of competition and variation written in the National Charter and elsewhere.
<p>Costs: MAD 17.4 million in year 1; MAD 5.2 million in year 2 ... (for purchase, does not include teachers training)</p>	

SCENARIO 3: DIFFERENTIATE TEXTBOOKS BASED ON CONTENT OR METHOD AND ALLOW FREE SELECTION BASED ON TEACHER INPUT

Objective:

- Introduce differentiation and innovation into the textbook market, allowing opportunities for evaluating outcomes.

- Allow teachers to help select the textbook according to their context and own level of familiarity.
- Provide an opportunity for textbooks to be more relevant to the local context.

Parameters and steps:

1. Ministry of Education updates and improves the textbook specifications, and issues three to four different requests based on different pedagogical models or regional variations and needs.
2. Publishers compete in one or all of the markets and selection criteria are transparent.
3. Publishers are allowed opportunities to research the effects of their materials on student performance and receive feedback from schools and teachers on improvements.
4. Instead of choosing textbooks at the district level for schools, a selection committee at the school level, including teachers, parents, and school heads, would select a textbook series for at least a 3-year commitment at a time.
5. The market would no longer be split artificially and some publishers may end up with more or fewer sales than others; however, they would have at least a 3-year purchase contract for planning purposes.
6. There would need to be a high-performance, but simple system of data collection on textbook requirements, a system of online data collection (*Massar*) and reliable distribution system.
7. There would be no change in public budget programming since the price of the textbooks would not vary according to collection.
8. Note: School-level choice as indicated in this scenario could be done starting now with the existing textbooks, but it is combined with the idea of introducing innovation and differentiation in the market in this scenario, since the textbooks need to be renewed anyway.

Opportunities	Risks
<ul style="list-style-type: none"> • Better forecast of textbook sales would allow publishers to plan, invest and potentially innovate more. • The choice of textbooks at school level would promote true competition among publishers. • Combined with ability to get feedback on the content and to make revisions at regular intervals, this would continuously improve the quality of the textbooks. • Content of textbooks would be more relevant to the local context, which should improve student engagement and teacher confidence with the materials (“relevance” and “simplification” were the two major suggestions that teachers had for improving textbooks). 	<ul style="list-style-type: none"> • Teachers/schools may not know how to evaluate and select the right textbook; making the wrong choice could lead to costs involved in changing after several years. • Teachers/schools may be tempted to enter into corrupt or fraudulent arrangements with publishers and select titles on the basis of these arrangements, rather than quality and price. • The distribution system would be more difficult, unless booksellers or distributors have storage capacities or other methods. Would require new procedures of distribution and monitoring (AMAS procedures). • Local booksellers would have to manage several different collections. • In the year of implementation of this change, the choice would have to be made early enough that publishers have a forecast for printing books, and

	the ability to offset losses if their book is not selected.
Costs: No extra costs except impact of distribution, training, awareness raising	

SCENARIO 4: REVISION OF THE TEXTBOOK DEVELOPMENT AND SELECTION PROCESS

Objective:

- Improve the quality of textbooks by a more interactive selection process
- Allow smaller publishers to enter the market since the initial costs of submitting a textbook model will not be as high

Parameters and steps:

1. Same competitive process, but selection process is done in phases, so publishers only develop and submit certain elements first and not the entire book.
2. The initial shortlisting should be based on more than a chapter or two, but less than a full, print-ready manuscript. A comprehensive proposal could include, for example, a description of the methodological approach to teaching and learning, justification of that methodology based on research, a full outline of chapter content and exercises, sample exercises for each major type of activity or content type, and full, sample chapters from the beginning, middle, and end of the book illustrating developmental sequence over the course of the period covered by the textbook.
3. Proposals would be for an entire series or set of materials covering two to three grades, as appropriate to the cycle of instruction and curriculum, and including any required workbooks, teacher’s guides, and supplemental materials.
4. After shortlisting, the Ministry of Education would work together with the publishers to review content in stages and provide feedback. The Ministry would reserve the right to get feedback from teachers or other external experts on reading instruction.
5. To avoid the loopholes in the textbook specifications, final selection and approval would be based on detailed evaluation criteria and scoring methods, with clear and objective measurements, and more points allocated to the elements that are non-negotiable and fewer points for those that are open to some flexibility.

Opportunities	Risks
<ul style="list-style-type: none"> • More transparent and rigorous selection process • Better quality through dialogue, partnership, and mutual understanding of selection criteria and quality principles • Textbooks better aligned to curricula and research • Less initial investment on the part of competing publishers • Less possibility to look for and apply loopholes in the process 	<ul style="list-style-type: none"> • Time consuming • Requires availability on the part of the textbook selection committee for a longer period of time • Risk of corruption between committee members and publishers
Costs: No extra costs	

SCENARIO 5: PURCHASE OF CHILDREN’S BOOKS AT SCHOOL LEVEL

Objective:

- Provide more reading opportunities for children in and out of school
- Increase the availability of a range of different reading materials, in terms of difficulty and content (subject, fiction/nonfiction, etc.)

Parameters and steps:

1. The Ministry of Culture has a substantial budget for non-textbook materials in Arabic language (MAD 11 million per year, and there are inexpensive reading materials available on the market at MAD 10–15 per unit). The Education and Culture ministries could work together to increase the supply of supplemental reading materials available in classrooms.
2. Donations from private sources, community-based organizations, and other nongovernmental organizations could also help to increase the supply of books and ensure that they are low-risk; that is, the cost of the books is not a factor that prevents schools from making the books available to children, even lending and taking them home. Sourcing can also involve national and local writing competitions to help increase interest in Arabic reading, encourage local authors, and even reward teachers to develop high-quality and innovative materials in the classrooms. Pre-service education can also be a source of original materials authoring, while improving the teaching and learning process for incoming teachers.
3. The same dynamic networks of nongovernmental organizations and local initiatives can be used to deliver materials to schools.
4. Books from any source can be selected or vetted by delegations based on standard minimum criteria set by the government, for example, to ensure that there are no values or themes represented that are inappropriate for the context. Approval should be transparent and documented, but not so arduous that it adds complexity and bureaucracy.
5. Books can be purchased at MAD 10–15 according to grade or age, possibly less if purchased at scale.
6. Books should be made available in classroom or school libraries, with children free to choose books that interest them, and able to borrow them for home use.

Opportunities	Risks
<ul style="list-style-type: none"> • The vetting process will help build capacity for understanding children’s book content and leveling. • Students and teachers are equipped with more reading material, which has proven critical for increasing motivation to read as well as reading ability. • Encourages local children’s book authoring in Arabic and creates opportunities for entrepreneurship and other community-based activities. 	<ul style="list-style-type: none"> • Requires procedures and training on library management (although this does not have to be complicated—there is a perception in Morocco that this requires specialized personnel at school level but it does not have to). • Costly, if government subsidizes book purchases. • Requires some suitable classroom or school infrastructure for storage, perusal, borrowing, reading on site. • Potential for loss of materials (but there are ways to mitigate this through peer monitoring; as supply

<ul style="list-style-type: none"> Increases the supply of materials that are relevant to the local context. Promotes the values of trust and sharing. Increases supply of books in retail stores. 	<p>of books increases, the incentive to steal them decreases).</p> <ul style="list-style-type: none"> Less equitable, since some schools may be more successful than others in sourcing materials through donations and partnerships. Book corners alone will not improve teaching and learning, and should still be accompanied by textbook and teaching materials reform.
<p>Costs: MAD 5.8 million (one book per 3 pupils, MAD 10 per book), 17.4 million (one book per pupil)</p>	

BASIS OF ESTIMATES FOR COST SIMULATIONS

Enrollment by grade, school location, and school type

Grade	Rural	Urban	Total	Total	Total
	Public	Public	Public	Private	Total
1	349 954	251 898	601 852	121 387	601 852
2	321 128	241 153	562 281	109 517	562 281
3	326 956	248 064	575 020	99 055	575 020
4	323 016	256 755	579 771	90 125	579 771
5	310 382	262 417	572 799	81 919	572 799
6	290 141	272 404	562 545	73 871	562 545
Total	1 921 577	1 532 691	3 454 268	575 874	3 454 268

There are 1,739,153 pupils enrolled in Grades 1–3 in public schools. The following simulation model is based on the unit price materials for each grade and the number of pupils enrolled by grade (school year 2013/2014). In order to narrow the gap between public and private schools (where supplementary materials are allowed and common), it would be possible to purchase exercise books, books, and an additional simplified common textbook for all pupils in primary Grades 1–,3 (for Arabic only).

One exercise book, one simplified textbook and one book per child in public school (a situation often encountered in private schools) corresponds to Scenario 1+2+5 and would be equivalent to MAD 49 million (or about 50% of the actual Ministry of Education contribution to the *One Million Schoolbag* initiative, or 13.5% of the total cost of the *One Million Schoolbag* initiative). This early grade intervention would have the potentially great impact of fostering pupils' abilities, reducing social inequalities, and facilitating teachers' work. The exposure to different materials (outside textbooks) would also facilitate the appropriation of MSA for children without pre-primary exposure. Though this would not replace in-service training, it could build teachers' capacity and introduce them to new teaching methods.

Scenario	Description	Unit price assumption	cost in millions (MAD)	Year
Actual	Cost of early grade (1-3) Arabic textbook (100% new books for public schools)	15-23	32.3	N (first year of implementation)
Actual	Actual : Cost of early grade (1-3) Arabic textbook (30% renew textbooks for public schools)	15-23	9.7	N+1 (second year after implementation)

*Research on Reading in Morocco–Analysis of
Textbook Procurement Chain and Market for Supplemental Reading Materials*

1	Cost of one additional simplified reading instruction textbook (100% new each year)	10	17.4	N
1	Cost of one additional simplified reading instruction textbook (30% new each year)	10	5.2	N+1
2	Cost of one exercise book per pupil (actual price)	12-20	30.0	N and N+1
2	Cost of one exercise book per pupil (MAD 15)	15	26.1	N and N+1
5	Cost of one book per 3 pupils for public schools (100% new)	10	5.8	N and N+1
5	Cost of one book per pupil for public schools (100% new)	10	17.4	N and N+1
ALL : 1+2+5	One simplified textbook, one exercise book, and one book per pupil	see above	48.7	

Annex 2: Supplementary Materials

A2.1. Background

Home access to books is consistently correlated with higher reading outcomes in the early grades. From a sample of RTI-administered studies, children who report having access to books at home score between 6 to 8 correct words per minute (cwpm) higher on reading than their peers who do not.⁵⁸ This is equivalent to about 6 months of instruction in these same countries, according to average grade-level differences found.

- Philippines (2014, 4 local languages) – 8 cwpm increase in reading fluency
- Senegal (2009, French) – 7 cwpm difference
- Jordan (2012, Arabic) – 8 cwpm difference
- Malawi (2010, Chichewa) – 4.5 cwpm difference
- Uganda (2010) – 7 cwpm in English, 6 in Luganda

In Morocco, there are few books available to pupils at home and in public schools in any language. According to the 2011 Progress in International Reading Literacy Study (PIRLS) survey 53% of children report having none or few books at home, 24% have “one shelf,” and at the other extreme, 5% report having more than 3 bookcases full of books. Similarly, the PIRLS study reported that 65% of schools have no school library, while 27% have a small library (500 titles or less). The USAID Early Grade Reading and Early Grade Math Assessment (EGRA/EGMA) study in Doukkala Abda⁵⁹ reported that although nearly all children had textbooks, 98% of the observed classrooms had no books, booklets, or magazines other than textbooks. It went on to report that “Reading outside of school appears to be uncommon: 9.5% of students reported using their reading textbook at home [...], and 52.2% of students reported that they ‘never’ read out loud at home; 31.8% reported reading aloud at home ‘sometimes’, and 9.1% reported reading at home ‘every day’.”

At present, support for supplementary materials is concentrated mostly in the Ministry of Culture (MOC). MOC has a budget of MAD 11 million for supporting books and reading in and out of school. MOC supplies the public libraries with books based on requests that the library sends for specific books or themes, to be taken into account in the next order. For flexibility purposes, MOC buys books through contracts and not through normal procurement process (call for bids). This year only MAD 60,000 were spent on books due to the fact that MOC used funds to build two cultural centers. Each year they have a grants program where funds can be used for publication of books and cultural magazines, participation in national and international festivals, creation of and special events in libraries, and public reading and awareness programs, as well as publication dedicated to people with special needs. For 2015

⁵⁸ All reports available on www.eddataglobal.org

⁵⁹ RTI International (2011). *Student performance in reading and mathematics, pedagogic practice, and school management in Doukkala Abda, Morocco*. Report prepared for USAID under EdDataII.

the funding amounts to MAD 10 million in two different tranches.⁶⁰ MOC also sponsors the annual international book fair in Casablanca.

Concerning school libraries, delegations are left with the responsibility of determining the budget to allocate to buy books. The delegation is also supposed to manage the school library, but in reality they don't have a budget line for books, and the general funding is usually used for other priorities (i.e., basic infrastructure). Students, parents' associations, and local nongovernmental organizations can buy books and provide them to the school libraries. Otherwise there is no department within the Ministry of Education or at the level of the AREF or delegations that is dedicated to the school libraries. The statistics office, whose main purpose is to provide in March of every year the number of students for the following year, does not have statistics on the content of the school libraries; their database only shows whether or not a school has a librarian. There are no data on "reading corners," and there is no department within the Ministry in charge of keeping track of this. Private schools have libraries, but the extent of their use has not been studied under this scope of work.

2. Methodology and scope of supplementary materials analysis

A large sample of supplementary reading materials for children in Arabic available in the Moroccan marketplace were catalogued, for this study, in a master file inventory (188 materials). A sample of these were analyzed in more detail according to a detailed survey of content, including:

1. The date and place of collection/buying
2. The editor (including country of origin, website, and whether a catalogue is available)
3. The price of the book
4. The type/size of book
5. The pedagogical content of the books

Editors' catalogues were downloaded from their website or obtained at the book fair. Books were either analyzed on the spot (33) during the International Book Fair in Casablanca (February 2015) or bought at the Book Fair and in retailers (155) and then analyzed. The analysis used a standardized questionnaire in electronic format (Tangerine™ software), and data were entered directly into the database using tablets or telephones. Retailers include a supermarket in Rabat (Marjane Bouregreg), a bookshop in Rabat Center (Librairie Libre Service), and a bookshop in Yacoub El Mansour, Rabat suburb (Librairie Atlas). The four retailers represent a variety in terms of neighborhood and client demographics.

The Book Fair was also a good opportunity to identify what is available on the Moroccan market and abroad. The size of space devoted for books (*mètre linéaire*) by each editor was collected and registered in the master file. Most editors had a dedicated space for children's books, with the exception of the large publisher *Afrique Orient*, which preferred to show novels and essays. The materials chosen for analysis represented a variety in terms of publisher, country of publisher, type, price and quality. Where materials were part of a collection, only one book of the collection was entered in the electronic database (along with

⁶⁰ <http://www.lematin.ma/express/2014/soutien-aux-projets-culturels-appel-a-candidature-au-titre-l-annee-2015/214235.html>

the number of books in the collection). Core textbook publishers (as indicated by Ministry of Education statistics) were included in the sample, as well as others. Nearly all the exercise books available in Morocco were included in the sample analyzed.

Among the 188 books, 71 were entered in Tangerine. The sample criteria were:

- Location purchased (for diversity in clientele)
- Type of books
- Editors
- Quality

Photos were taken of each book (cover, fourth cover, and two pages in the book) and were given names starting with the Tangerine unique record ID. The names of the materials, editors, and authors were entered in phonetic Arabic using latin script. Data entry in Tangerine was performed by a team: Youssef El Haji, Amal Hmimou, M'barek Laousse (statisticians), and Abdessalem El Omari (consultant). This team was trained in the tool administration and also involved in its adaptation to the Moroccan context. Data were checked, harmonized, and cleaned by Youssef El Haji. Data from Tangerine were checked against data from the master file for key variables (type of materials, and place of buying). *Exhibits A2-1* to *A2-2* below show the characteristics of the master file (inventory) and data entered in Tangerine.

Exhibit A2-1. Number of supplementary materials reviewed

Place of purchase	Master File	Tangerine
Librairie "Livre Service"	21	12
Librairie "Atlas", Rabat	16	6
Librairie "Marjane", Rabat	24	13
SIEL, Casablanca	127	40
TOTAL	188	71

Source: Authors, from the supplementary materials database

Exhibit A2-2. Type of supplementary materials reviewed

Type	Master File	Tangerine
Alphabet book (" <i>abecedaire</i> ")	5	4
Exercise book	48	34
Book	123	32
Poster	5	1
Official textbook	7	0
TOTAL	188	71

Source: Authors, from the supplementary materials database

The sample is therefore not representative or exhaustive, but rather provides a description of the availability, origination, price, and other characteristics of materials in Arabic for young readers in Morocco.

A2.2 Findings

The Moroccan book sector grew to MAD 3.3 billion (US\$350 million) in 2010 from about 2.2 billion in 2006, accounting for about 2% of industry revenue, including textbooks.⁶¹

According to the Moroccan publisher Yomad, one of the leading children’s book publishers in Morocco, compared to 49 titles in French they produce 18 in Arabic. Most of the Arabic books are stories translated from French. Other leading publishers also confirmed printing more books in French than in Arabic. Most publishers limit print runs to a maximum of 3,000—which is the amount needed to benefit from economies of scale, but is a risk in terms of sales. They expect 30% might go unsold.

Ultimately, a strong book sector requires people who purchase the books. Right now, the Ministry of Education, through the textbook market, is one of the principal buyers. However, most publishers hesitate to print in Arabic—especially children’s books—because there is low demand. Individuals who purchase books for the home are those who send their children to private schools and tend to purchase in French, especially since private schools may require parents to purchase supplementary materials. Additionally, books in general are seen as a market for older children; even public libraries are seen as a place to go to do research at the secondary school level, and not a place to go to read for pleasure, according to some sources. For publishers to sell books in Arabic, the books would have to be low-cost (MAD 10–15) and therefore either low quality or very high print runs. However, this outlook changes in high school when students will ask for more supplementary material for the discipline of their interest.

For one publisher, the most successful collection is stories of the Prophet, sold at 6 MAD/each. To achieve such a low price, the publishing is done in Lebanon, where printing is less expensive. Distribution accounts for about 25% of the price, royalties about 6-8%, and editing is 45%—just about the same cost spread as in the textbook market.

How does this compare to the purchasing habits of consumers surveyed at the Book Fair?⁶² Out of 79 people who were stopped and agreed to answer the question, 92% had purchased books for children. Of these, 86% had purchased a book or books in Arabic, and 75% had purchased books in French. The buyers were primarily private (including international) school parents (86%); only 7% were buying for a child of pre-school age, and 7% for a child in the public school system. However, the books were intended for primary age children, not secondary. On the other hand, only 29% of buyers said that their child was a “beginning” reader; most others were “intermediate” or “advanced” readers. Excluding some 20% of buyers who bought in large quantities (10 or more), the average purchase was three books in Arabic. *Exhibit A2-3*, below, shows the type of books that were most popular.

Exhibit A2-3. Type of books purchased by parents at the book fair

Type	Master File	Tangerine
Story book	49	45%
Workbook	24	22%

⁶¹ <http://www.ccfi.asso.fr/blog/2012/05/maroc-entretien-avec-hassan-el-ouazzani-directeur-du-livre-au-ministere-de-la-culture/>

⁶² Keeping in mind that the limitations of this rapid survey result in significant selection bias due to the event, as well as possible bias in selecting individuals to interview, and those who agreed to answer.

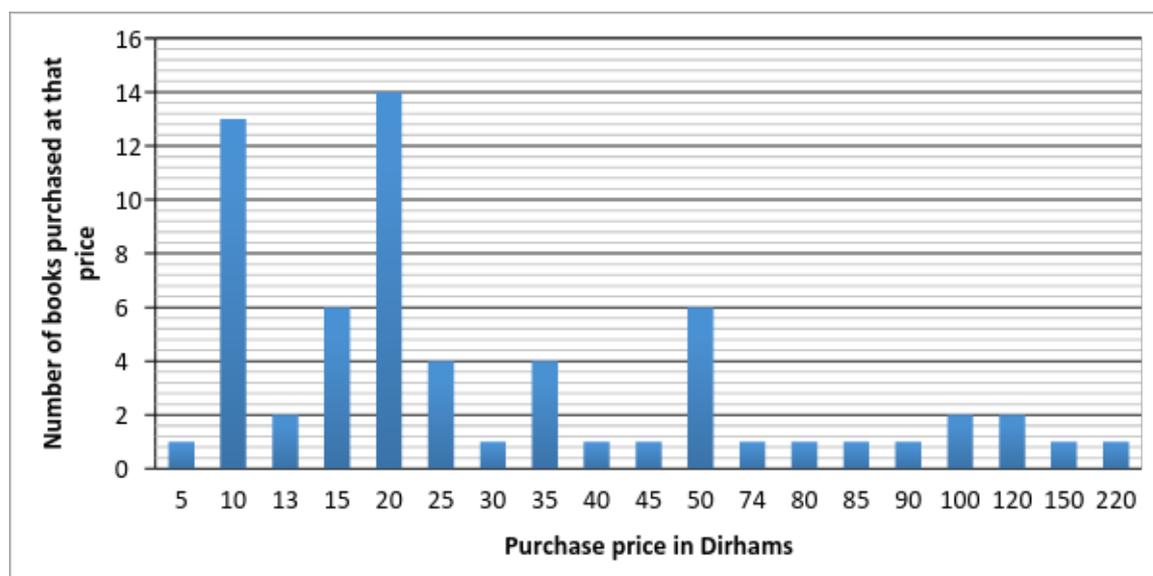
Novel	11	10%
Dictionary	9	8%
Alphabet book	9	8%
Poems, songs, rhymes	5	5%
Textbook	1	1%
Other type	1	1%
Reference materials (other than dictionary)	0	0%

Source: The authors, from the Book Fair consumer survey

Alphabet books are somewhat in demand, but not as much as more sophisticated workbooks or storybooks. The most popular subjects of the books that were purchased were animals (18%), religion (18%), adventure (15%), the alphabet (13%), and culture (7%). When buyers were asked what they liked about the content, the most common response was that it was of educational value (48%), followed by age-appropriate content (22%), nice images (18%), or religious values (10%). For the most part, the clients expressed satisfaction with the selection and quality of books in Arabic; only 14% felt there was not enough selection. Individuals who did not buy books in Arabic were asked why; although many gave no response, those who did expressed that they had a specific reason to require French books or they simply hadn't yet found a suitable book in Arabic. The low response rate doesn't really allow us to understand what prevents some buyers from purchasing in Arabic.

On average, parents spent 36 dirhams for a book; however, excluding several high-priced purchases (more than 50 dirhams), the average price paid is closer to 18 dirhams. *Exhibit A2-4*, below, shows the distribution of purchases by price.

Exhibit A2-4. Price of books purchased by parents at the book fair



As supported by other interviews, most buyers of Arabic material for children are paying in the 10-20 dirham range. Librarians also mentioned that parents usually pay little attention to the content or the quality of the book, and make their selection on the price and the size of the publication (number of pages). The sample size does not allow us to see any pattern related to

relationship between purchasing and revenue. However, we can confirm that our sample was distributed almost equally among a wide range of income brackets (self-reported), and not disproportionately high-income families, although they were mostly from Casablanca. In 16% of cases, the origin of the publisher was not identifiable, but of those that were, 58% were Moroccan publishers and 16% from Egypt.

Types of supplemental materials (supply). Another component of the supplemental materials research catalogued Arabic reading materials for young readers that were available in bookstores and libraries. The main source of books were Moroccan publishers, although there were also materials available of Egyptian, Lebanese, Syrian and Tunisian. *Exhibit A2-5* below provides some details of the materials that were recorded.

Exhibit A2-5. Origin and price of supplementary materials (MAD)

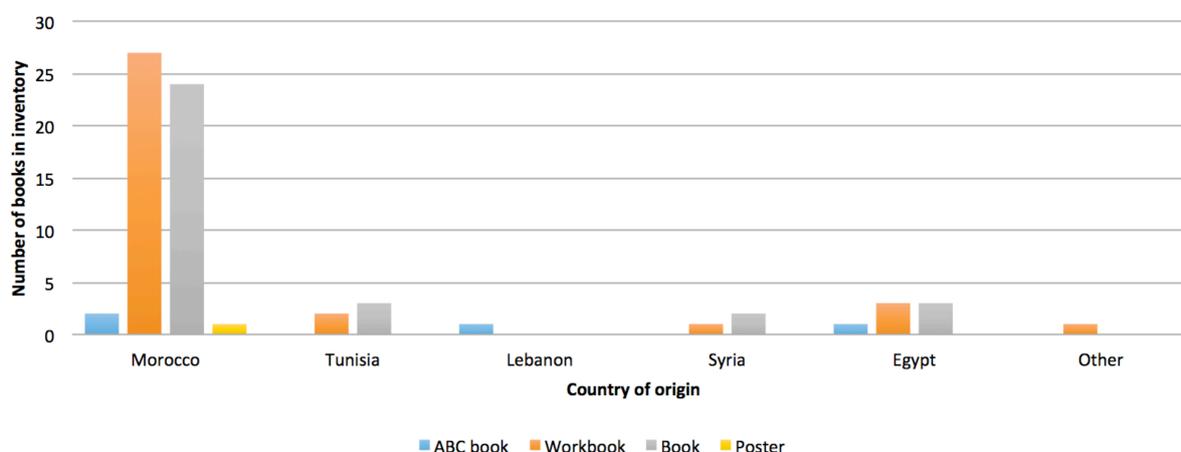
Origin	Number of items	Average price (MAD)	Low	High
Morocco	53	19.4	3.5	80
Egypt	7	11.3	5	20
Tunisia	6	16	5	25
Syria	3	12.7	9	15
Lebanon	1	12	n/a	n/a
Other	1	n/a	n/a	n/a

Source: The authors, From Supplementary Materials database

Because the materials were of all types--books, posters, exercise books, etc.--the prices reflect a range from 5 to 80 dirhams across all countries. Anecdotally, Egyptian and Lebanese publishers have a reputation for publishing very low-cost reading materials in Arabic, but these also tend to be low quality (quality of paper, ink, etc.). When looking at the different types of materials by publisher, the price per page of material tends to be about 2.9 dirhams per page for workbooks and 2.5 for reading books, compared to 1 or 2.5 in Egypt, 1.8 or 2.9 in Syria and 3.1 or 1.4 in Tunisia for workbooks or reading books, respectively.

All countries combined, the average price per page for supplemental materials is about 2.4 dirhams per page for reading books and 2.7 dirhams per page for exercise books. Whether the item is in black and white or color does not appear to have an impact on price according to the materials in our catalogue; in fact, all imported materials were full color, and only Moroccan publishers had books that were black and white or with limited color illustrations. The following chart (*Exhibit A2-6*) provides more detail on they type of the books available by publisher.

Exhibit A2-6. Type of books by publisher



Since most of these are books or workbooks, they are mostly fiction, although a few nonfiction or reference-type materials were found from Moroccan and non-Moroccan publishers. Since most of these are books or workbooks, they are mostly fiction, although a few non-fiction or reference-type materials were located. *Exhibit A2-7* below presents all Arabic book publishers with some information about their collection and book type, if available.

Exhibit A2-7: Arabic book publishers in Morocco

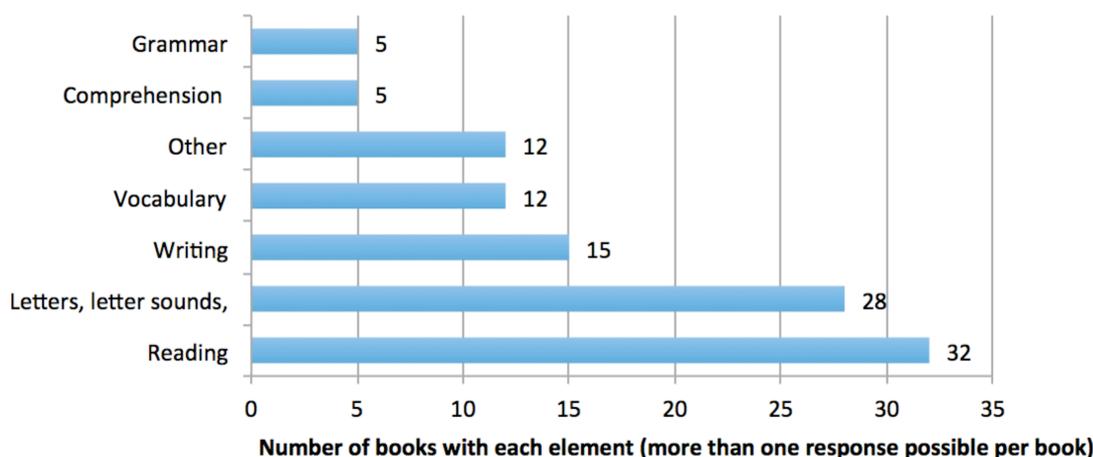
Website	Book type	Publisher
http://www.afrique-orient.com/	Murchidi Textbook	Afrique orient
		Almarkaz Attakafi Al Arabi
	Alphabet book	Centre culturel arabe
www.elkawtar.com	Workbook	Collection Elkawtar
	Book (part of a set), Adventure	Dar Al Alamia Lil Kitab
	Workbooks, primary	Dar Arrissala
		Dar Assafaa Al Hadita
		Dar Attaouhidi
	Al Mufiid Textbook	Dar Attakafa
http://www.darerrachad.com/	Bilingual alphabet book/Non-fiction book (religious)	Dar Errachad El Hadita
	Workbook (letters, vocabulary); 1001 nights series of books	Dar ihya el ouloum
http://www.darnachralmaarifa.com/index.php	Workbook/Book	Dar nachr Al maarifa
	Book, poster, workbook	Edisoft
http://editionsEditions Chaaaraoui.com/fr/	Book	Editions Chaaaraoui
http://lacroiseedeschemins.ma/		Editions La Croisee de Chemins
	Book (fairy tales-snow white, cinderella)	Groupe Librairie des écoles (Italy?)
http://www.ircam.ma/fr/	Tamazight textbooks	IRCAM
http://www.groupeelmaarif.com/		Librairie Al Maârif
	Workbook (letters, writing)	Librairie Al Ouma
http://librairiedaralmassar.com/	Alphabet workbook	Librairie Dar Al Massar
http://www.lpn.ma/	Kitaabi Textbook	Librairie Papeterie Nationale

		Société Al Achbal d'Édition et Distribution
http://www.somagrame.ma/ / .com	Book, workbook (vocabulary, grammar)	Somagrame
	Fi Riïhab textbook, books (fiction, adventure)	Top édition (Librairie Assalam Al Jadida et Dar Al Alamia Lil Kitab)
http://yomadeditons.net/	Childrens books, mostly French, but some Arabic	Yomad Editions
	Reference, workbook	Editions Solayki Akhaouayn

Source: Authors, Textbook survey (non-exhaustive samples)

According to the purchases of individuals at the international book fair, there is demand by parents for workbooks and supplemental materials. Some editors have developed and sell workbooks associated with the official textbooks or separate, even though these are not used in classrooms (not purchased by the Ministry). Therefore there is some market supply and demand for materials that support children’s reading development, though some of these may also be targeted at the second-language learner (who already knows how to read in another language). Many alphabet or vocabulary books are in French and Arabic. Interestingly, many of these also cover early learning topics like phonics and vocabulary—the topics that have been identified as missing or under-emphasized in the official textbooks. **Exhibit A2-8** below shows the distribution of pedagogical content—whether deliberately pedagogical or not—among the 67 books and workbooks that were catalogued.

Exhibit A2-8. Pedagogical elements of the books



A review of a sample of text from across the books (photographs of a random page or two from within the books) suggests that large-print, or books with otherwise low text density per page are coming from outside of Morocco (in particular, Syria, Tunisia and Egypt), while Moroccan publishers write very text-heavy stories, even if these are accompanied by elaborate illustrations.

Exhibit A2-9: Prices, number of page, exercise book by Publisher, and Grade

Grade	Exercicebooks Name (Arabic)	Workbook Name (French)	Publisher	Part of a Textbooks collection	Price in MAD	Number of pages	color	Images	Format
1	Al Moufid Fi Alloghat al Arabia (writing)	Cahier Al Moufid de la langue Arabe (écriture)	Dar Attakafa d'Édition et de Distribution	Al Moufid	12	80	Yes (black and red)	No	16,7 cm X 24 cm
1	Al Moufid Fi Alloghat al Arabia (Expression)	Cahier Al Moufid de la langue Arabe (Expression)	Dar Attakafa d'Édition et de Distribution	Al Moufid	14	96	Yes (four colors)	Yes	20,7 cm X 27 cm
1	Korrasat Alloghat al Arabia	Cahier de la langue Arabe	Librairie Al Ouma d'Édition et de Distribution	No	20	72	Yes (black and blue)	Yes	A4
1	Kittabi Fi Alloghat al Arabia (pupil workbook)	Kittabi de la langue Arabe (cahier d'élève)	Librairie Papiterie Nationale	Kittabi	24	128	Yes (Orange and Blue)	Yes	A4
1	Adalil Fi Tattbiqatte Alloghat al Arabia	Guide d'applications de la langue Arabe	Arrissala d'Édition et de Distribution	No	33	80	Yes (four colors)	Yes	A4
2	Korrasat Alloghat al Arabia	Cahier de la langue Arabe	Librairie Al Ouma d'Édition et de Distribution	No	20	64	Yes (black and blue)	No	A4
2	Adalil Fi Tattbiqatte Alloghat al Arabia	Guide d'applications de la langue Arabe	Arrissala d'Édition et de Distribution	No	33	88	Yes (four colors)	No	A4
3	Korrasat Alloghat al Arabia	Cahier de la langue Arabe	Librairie Al Ouma d'Édition et de Distribution	No	20	64	Yes (black and blue)	No	A4
3	Adalil Fi Tattbiqatte Alloghat al Arabia	Guide d'applications de la langue Arabe	Arrissala d'Édition et de Distribution	No	33	80	Yes (four colors)	Yes	A4

Printing and distribution. As mentioned above, the Ministry of Culture supplies the public libraries with books, based on requests for specific books or themes, to be taken into account in the next order. For flexibility purposes MOC buys books through contracts and not through normal procurement process (call for bids).

Contrary to what the textbook sector publishers say, the supplementary books publishers suggest that there are not sufficient networks for marketing books to booksellers and convincing them to order books, so that printing can be based on a more realistic estimate of sales. Instead, most print runs are about 2000 and then the publishers work to sell those, even it takes several years (up to 10, according to one publisher). The cutpoint for getting a good price is about 3000 books. Therefore the publishers also need capacity to stock books and distribute. Librarians are also in charge of ordering books for public or community libraries, and according to one individual interviewed, they make efforts to meet their customer's demands, and their experience helps identify what will work and what will not. On the other hand, 'what works' seems to be books in French and reference materials for secondary or college students, and Islamic materials also for older readers, and the low selection of learning materials or reading spaces for children is not necessarily encouraging demand. In addition, these last few years the book is facing stiff competition due to the penetration of the Internet and the use of new digital tools (tablets, smartphones, etc.)

A2.3 Conclusions

Summary. There is clearly more competition and more choice in this market than in the textbook market, and there are a variety of workbooks and early learning materials for Arabic available from both within and outside of Morocco. Nevertheless, the early reader market remains somewhat limited in terms of the types and level of difficulty of the books. Although there are some non-fiction reading materials (children's dictionaries, children's encyclopedias), there is not an abundance of choice of non-fiction for early readers, and early

reading books are fiction, often fables imported and translated rather than written for the local audience in Arabic. In general, there seems to be a gap between early phonics-based alphabet or vocabulary books and then text-heavy storybooks. This probably reflects the prevailing pedagogy in the schools which promotes reading through a whole language approach that involves instructor led guided reading based on stories where the focus is on the theme of the story and not on its level of difficulty or linguistic context.

The fact that librarians try to meet existing demand rather than create new demands may be perpetuating a certain lack of interest in early reading materials in Arabic since libraries are seen as a place to come to do research, when you already know how to read. In any case, demand for Arabic reading materials has to come from parents who have been made aware of the importance of reading at all ages; at present, it seems like this demand is coming mainly from urban parents who have children in private schools. Currently publishers find it too risky to produce children's books in Arabic because there is not enough guarantee of sales; therefore, this is opening the market for foreign publishers who can produce more for less and introduce to the Moroccan market at less risk.

Suggestions. In the future, Morocco would need to work at both the supply- and demand-sides in order to expand access to and use of reading materials in Arabic. On the supply-side, there is a need to fill the gap mentioned above and improve the quality and variety of books for early learners. This includes expanding the way Arabic is presented for children, and experimenting with other formats—cartoons, comics, board books, manipulative books, large print, integrated audio, etc. as well as content—imaginative characters, non-fiction discovery books, leveled series, fun/silly/colorful subjects, etc.

As the supply increases, and the content becomes more diverse, parents and other potential buyers will need to be informed about how to engage their children in reading, how to present books of different formats and contents, how to support children's independent reading, and especially why they should do so. Parents also need to have higher expectations for quality titles and librarians need to reach out and encourage more reading with early learners in the library. There are many things that libraries can do—and some are experimenting with this—to create demand, such as organized story time, reading programs or contests, specific rooms or corners of the library that are designed specifically for young children, organizing parallel activities (music, art) to bring people in and raise awareness, and outreach events to take books outside the library to raise awareness of availability.

Parents may start to purchase books if the price is lower, but ultimately public and school libraries should also help to provide access to books for those who can't afford them. The two objectives can be mutually supportive since higher print runs help decrease the price per book, and publishers may be able to print more if they have a public sector (or private) buyer to furnish schools and libraries with a certain title or series. Although the existing selection of books on the market seems to be missing the level between simple alphabet-based workbooks and text-heavy story books, in the interim if schools had more time for story reading in the classroom, some of the Moroccan-published books might be suitable for reading aloud in the classroom, even though the text density would make it difficult for independent reading. It is important to recall that earlier-referenced studies conducted under this research program in 2014 also found that teachers want more materials in schools and would welcome more time for free reading. Therefore the demand is there, but if the public sector is not the buyer, then

they need to allow schools and private or community programs to purchase books. This implies a reduced oversight role by the central government in allowing publishers to market directly to schools and schools to make independent choices with a clear budget to do so.

Working together with publishers and authors may help determine other mechanisms to support writing and publishing of leveled books to fill the gap. It may be possible that as digital content expands (see insert below), some digital material can be adapted for the print market. (Digital content, by its nature and when designed for tablets or small screens tends to be less text-heavy). Additionally, the potential for digital self-publishing and expanding markets through digital content is an increased incentive for authors, even if a low number of books are printed and published locally, a digital version may increase sales in the future. Organizing writing workshops or training programs for authors may also help stimulate supply of suitable early reading materials.

Note on digital materials

The GENIE program (Généralisation de l'Informatique dans les Ecoles or "Expanding Technology to all Schools") was launched in 2006. The start was a Microsoft competition of innovative teachers. It is a program to introduce new technologies in schools. It has reached 1000 schools with IT labs with 500 multimedia resources in 90% of the subject areas. Arabic subject for primary was introduced in December 2013. Digital content first targeted sciences. The process is rather to adapt existing resources into arabic (localisation) then to develop local materials. GENIE has a new pilot project of school with tablets (see Fondation Zakoura for more information). The digital resources are developed through international bidding competitions, allowing 3 to 9 months to develop/localise software. There is also an interactive review process of the software development (including a demo module).

The CDG (Caisse des Dépôts) wants to launch a pilot project targeting early grades with tables in schools and applications to support reading and maths acquisitions. CDG is actually building a team and negotiating partnerships with MoE and other national or international structures.

The CNIPE (Centre National des innovations pédagogiques & de l'expérimentation) co-manages with GENIE the National Laboratory for Digital resources, The CNIPE's role is to validate the digital resources that are created after call for bids made by international organizations and through the contest organized by Microsoft as a member of the jury.

As per CNIPE a very few resources are published online (contrary to what GENIE says) and very few incentives, there is not enough funding to develop more digital material.

The Arabic language component of the GENIE program consists of several units (see Table 1), targets a specific grade.

Number of units per grade

Level	Number of units
1 st year	11
2 nd year	8 + Game
3 rd year	8
4 th year	8
5 th year	9
6 th year	7

Source : Authors

For the first level, each unit consists of 4 parts accompanied by an audio recording to guide the user and help him to manipulate the application. In the first part, it was an introduction of a set of characters and animals whose name is pronounced slowly and visualized by the application. In the second part, there are comprehension questions with an automatic correction. The third part is an Arabic learning activity based on the phonics method. Finally, the fourth part is as a game of integrating the letters in a table according to the pronunciation. Passing from one unit to another, the level of exercises becomes more difficult.

In the second level, there are 3 parts for to each unit. In the beginning, there is a text illustrated with images and pronounced automatically. After that, there are comprehension questions. The last part is an exercise to complete the sentence with the correct word. The difficulty level evolves according to the unit.

From the third level, the texts begin with interesting and advanced topics (Adventure, Environment, History, Friendship, Nature ...). The questions of comprehensions become more focused. Concerning the exercises, there are many sections on the vocabulary and grammar of the Arabic language.