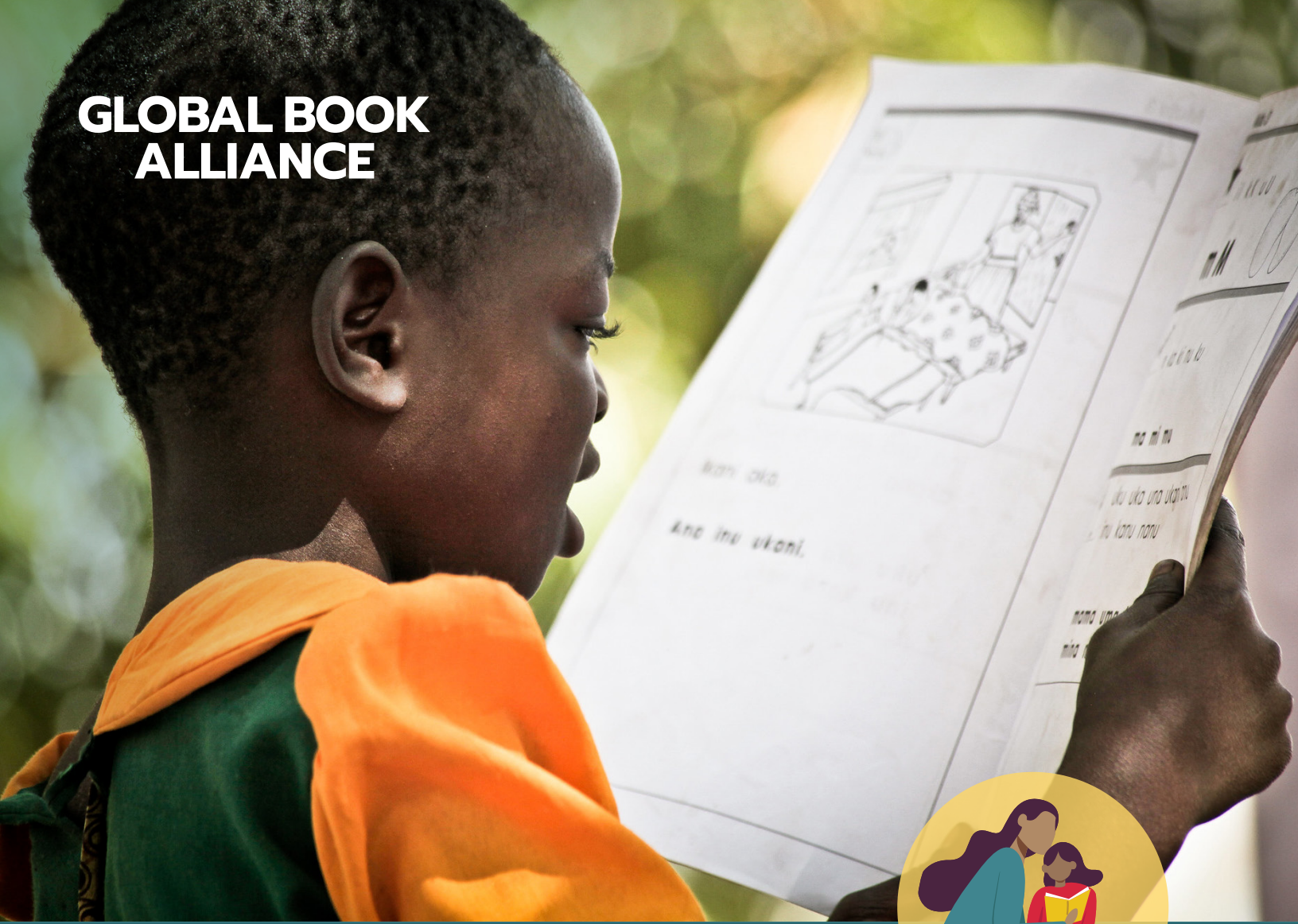


GLOBAL BOOK ALLIANCE



Supply Chain Analysis

Malawi

June 01, 2021



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LIST OF ACRONYMS AND ABBREVIATIONS

DBE	Department of Basic Education (MoEST)
DEMIS	Department of Education Management Information Systems (MoEST)
DEP	Department of Education Planning (MoEST)
DFID	Department for International Development (UK Aid)
EGRA	Early Grade Reading Assessment
EMIS	Education Management Information System
GoM	Government of Malawi
IP	Implementing Partner
MERIT	Malawi Early Grade Reading Improvement Activity (USAID-funded project)
MIE	Malawi Institute of Education
MoEST	Ministry of Education, Science and Technology
NRP	National Reading Program
NSO	National Statistics Office
PTA	Parent-Teacher Association
REFAM	Reading for All Malawi (USAID-funded project)
SMC	School Management Committee
SPU	Specialized Procurement Unit (MoEST)
TLMs	Teaching and learning materials
USAID	United States Agency for International Development
YESA	Malawi Yesani Ophunzira (Assess the Learners) (USAID-funded project)

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EXECUTIVE SUMMARY AND HIGH-LEVEL RECOMMENDATIONS

This Malawi Book Supply Chain Analysis was conducted on behalf of the Global Book Alliance (GBA) by the USAID Global Book Alliance in Action project. For the purposes of the analysis, the *book supply chain* is defined as a six-phase process:

1. Planning and Forecasting
2. Title Development
3. Publishing and Printing
4. Procurement and Purchasing
5. Distribution Management
6. Active Use

FIGURE 1. THE SIX PHASES OF THE BOOK SUPPLY CHAIN



There are many different definitions of **essential reading materials**, and what is considered *essential* at one stage of learning will be less so for another. For the purposes of this report, we use the following terms and definitions, per USAID guidance:

Decodable, leveled, and supplementary readers (collectively described as **essential readers**) are all required elements for reading acquisition, but each plays a different role.

- **Decodable readers** are reading materials in which all words are consistent with the letters and corresponding phonemes that the reader has been taught. These readers are sequenced in accordance with the order in which letters are taught in the school curriculum, and progressively increase in difficulty.
- **Leveled readers** are a set of books organized by level of difficulty, based on the complexity of the words, sentences, content, and other factors.
- **Supplementary readers** are those used for reading practice; they may not be decodable or leveled, and they do not tie directly to the school curriculum.¹

¹ Definitions are adapted from USAID, *2020 Compendium of Standard PIRS for Education Programming*.

The Book Supply Chain Analysis focused on the supply of essential reading materials for successful literacy acquisition for children in primary school grades 1– 4. It was commissioned to inform the work of the GBA as well as that of USAID/Malawi; the Malawian Ministry of Education, Science, and Technology (MoEST); and other key development partners in the country. The analysis was conducted by a team of GBA researchers from October 2019 through January 2020. Following desk research, the GBA team conducted in-country research in and around Lilongwe, Blantyre, and Zomba between November 18 and December 4, 2019. The team interviewed and gathered information from a number of stakeholders, including ministries of the Government of Malawi (GoM), donors and their Implementing Partners, publishers, printers, distributors, primary school staff, and civil society groups.

The GBA team found challenging issues in each phase of the book supply chain for all primary-grade reading materials in Malawi. There are gaps for every kind of book and in every stage of the process, from planning and forecasting essential reading materials to the capacity and demand for developing, publishing, printing, and purchasing the materials and using them effectively in classrooms and homes. While the team has made recommendations for addressing each gap in the supply chain, the key issue overall that must be prioritized and addressed is that outside of limited donor projects, there is no systematic initiative to increase the availability of, access to, or use of essential readers. The existing book supply chain focuses almost exclusively on textbooks, though many gaps remain in that supply

chain as well. This means that almost all of the available data relate to textbooks; information and recommendations on the book supply chain for essential books must in many cases be extrapolated from these data, given the absence of an existing market or supply chain for essential readers. Donors and the GoM should prioritize this issue and develop plans to address it so that education sector investments will have the desired impact.

The book supply chain process is complicated by high levels of poverty and dependence on donor funding in Malawi. More recently, these challenges have been compounded by the lack of donor trust in GoM public sector financial management due to the Cashgate scandal.² This has led donors to work through parallel systems, and their efforts have generally been restricted to certain areas within the book sector and tend not to be part of a considered and cohesive plan for development of the book sector in Malawi.

Addressing the gaps in the book supply chain will require working in parallel to strengthen the public sector financial management system, thus allowing a return to direct budget support from donors, and building awareness of and the capacity for proper planning, development, distribution, and use of essential reading materials in Malawi in both the public and the private sectors. Community-level actions to strengthen the demand for and use of essential reading materials are also needed. This work will require continued and significant donor engagement and financing, with a gradual transition to GoM funding.

Addressing these gaps will also require working with a range of actors across the book supply chain, as listed in Table 1.

TABLE 1: KEY BOOK SUPPLY CHAIN ACTORS

Institutions	Actors or Departments
Ministry of Education, Science and Technology (MoEST)	Departments of Basic Education, Inspection and Advisory Services, Education Management Information Systems, and Education Planning, and the Specialized Procurement and Supplies Units
Malawi Institute of Education	National Steering Committee, Curriculum Development Department, Education Materials Resource Centre, Material Development Department, writers, and illustrators
Donor community	UNICEF, World Bank, Norwegian Agency for Development Cooperation, USAID, KfW Development Bank, UNESCO, Department for International Development, and their implementing partners
Governmental financial agencies	Ministry of Finance, Economic Planning and Development, and Malawi Revenue Authority

² See page 19 for further information.

Institutions	Actors or Departments
Distributors	Private distributors and the MoEST Supplies Unit
Printers and publishers	Local and international publishers and printers
Schools	Head Teachers, teachers, students, Parent-Teacher Associations, Mothers Groups, School Management Committees
Homes	Parents, children, family members, and caregivers

The GBA team identified a number of recommendations within each phase of the book supply chain and categorized them as immediate (I), medium-term (M), and longer-term (L) in order to facilitate the planning of next steps.³ To be clear, GBA recommends that actions be taken on *all* recommendations in the short term; the recommendations identified as immediate are those whose results can have a catalyzing effect in the short term or can help guide the work of the medium- and longer-term processes.

High-Level Recommendations

The GBA team also had overarching recommendations separate from the specific phases of the book supply chain. The team’s primary recommendations are as follows:

- The MoEST, education sector donors, and book sector stakeholders (including printers, publishers, school-level actors, and civil society) should develop a long-term Book Sector Development Plan⁴ or similar sector planning document. The plan may be developed through the establishment of a Joint Book Development Working Group⁵ or a related coordination structure that builds on existing mechanisms, and should be well-known and understood by publishers and other book sector actors. (M)
- The Working Group and the Plan should comprehensively address the topline issues noted here and the recommendations for each phase of the book supply chain highlighted in this report. These issues are complex, inter-related, and systemic, and a piecemeal approach to addressing them will not succeed. (L)

³ See Annex 1 for these recommendations organized by timeframe.

⁴ See Annex 2 for an illustrative outline of the Book Sector Development Plan.

⁵ Throughout this report, the terms *Book Sector Development Plan* and *Joint Book Development Working Group* are used for ease of reference. The authors understand that operationalization in Malawi may result in different terminology. The roles, functions, and content of the working group and plan are the critical point, not the specific titles used.

- The Joint Book Development Working Group should explore how investment and actions at the national, subnational, local, and community levels can strengthen the entire book supply chain, from opportunities for local publishing and purchasing of essential reading materials to Social and Behavior Change Communication campaigns that support the use and care of books. (M)
- The Book Sector Development Plan should look forward over the next 20 years and provide a blueprint of how to achieve the goal of engaging the public and private sectors in building a sustainable supply of essential readers and textbooks for primary school learners, ultimately funded by the GoM with an eventual exit strategy for donors. (L)
- The MoEST, donors and book sector stakeholders should prioritize systematic collection and use of book data, on textbooks as well as essential readers, to inform plans and actions, since existing data is limited and incomplete and does not provide a sound basis for planning to meet the book needs of primary school learners. (I)
- The Book Sector Development Plan should include an analysis of different models of public and private sector roles to address gaps in the book supply chain for all types of books for primary school learners and of the capacity-building needs associated with each model for each stakeholder. (M)
- The donor community should coordinate and address the capacity-building requirements outlined in the Plan. (L)

A negotiated Book Sector Development Plan will help alleviate the stakeholders' fiscal mistrust and provide an enduring foundation on which to build a MoEST long-term book supply strategy. It will also lead to costed implementation strategies that could elicit bilateral or pooled funding commitments from donors in the short and medium term, before the longer-term transition to GoM financing. In this way, the MoEST and partners can develop a functioning book supply chain, one that will ensure that primary school children have and benefit from the use of not only textbooks but also the essential reading materials that are necessary for reading acquisition.

SUMMARY OF RECOMMENDATIONS BY BOOK SUPPLY CHAIN PHASE

Planning and Forecasting

GBA recommends the following:

- The donor community should prioritize supporting the MoEST to expand its planning and forecasting processes to include sufficient numbers of high-quality essential reading materials as well as textbooks. (I)
- The MoEST and donors, through the JBDWG, should assess the ongoing transition to digitalized data collection for opportunities for further expansion, such as via the work of the USAID YESA Project. GBA recommends including data on book types and stocks, integration with enrollment data, and, with additional training, potentially data collection at the school level via feature or smart phones. Periodic verification of book stock via options such as apps, SMS, calls, WhatsApp, and photos can be valuable given personnel and resource constraints, as well as weather and road conditions, which limit opportunities for physical verification. (I)

Title Development

GBA recommends the following:

- The MoEST, with donor support, should incorporate into the Book Sector Development Plan:
 - » A non-transferable budget line for essential reading materials within the overall MoEST budget, so that these materials (and not just textbooks) are part of the budget. This will need to be financed initially by donors but should include a commitment and plan for a gradual transition to GoM funding. (L)
 - » An assessment of current and potential book development capacity in both the MIE and Malawi's publishing sector, including a desk review, site visits, and interviews. (M)
 - » An assessment of the various title development models in the region, including the costs, benefits, technical capacity-building considerations, timelines, and economic impact of each. (M)
 - » A costed, phased strategy for building the title development skills needed to create sufficient high-quality essential reading materials for primary students, not only in English and Chichewa but also in local languages, including Tumbuka, Yao, Lomwe, Nyakyusa-Ngonde, Sena, Kokola, and Tonga. (L)

Publishing and Printing

GBA recommends the following:

- The Book Sector Development Plan should include a detailed assessment of local publishers' needs related to producing sufficient high-quality essential reading materials for primary school grades and related training priorities, plans, and timeframes. (M)
- Per the findings of this assessment, the Book Sector Development Plan should include efforts to increase the role of the private sector, including the local publishing industry, in the development of essential reading materials. (M)
- The MoEST and donors should explore and adapt the experiences of countries that have successfully stimulated the market for the provision of essential reading materials for use in schools and in homes. (M)
- Capacity building plans within the Book Sector Development Plan should include additional support to publishers and printers on the development of materials for children with disabilities. (M)

Procurement and Purchasing

GBA recommends the following:

- The GoM and donors should continue work to strengthen the public financial management system in order to rebuild trust and permit predictable donor funding that will allow for cooperative planning and timely GoM payments to vendors. (L)
- Donors should work with the GoM to analyze what steps need to be taken in order to meet requirements for providing direct budget assistance and a plan to gradually achieve them over time, as well as how to accountably provide support in the meantime. (L)
- Donors should provide specialized technical assistance to support an analysis of costs and benefits of local versus international printing, including the impact of the tax on imported paper on the local printing sector and potential options for a revised tax structure. (I)
- The Book Sector Development Plan should include a framework that will allow the GoM over time to consistently allocate a set budget percentage for the purchase of essential reading materials. (L)
- Donors and the MoEST should explore investment in community approaches that involve local councils, alumni, parents and small NGOs or projects that could mobilize resources to purchase books for students to use at home. These actors could also champion book procurement and accountability within these processes at the local level, while promoting the local publishing industry. (M)

Distribution Management

GBA recommends the following:

- The Book Sector Development Plan should include a cost benefit analysis of options for book distribution, including transferring book distribution to the private sector, modernizing the MoEST Supplies Unit to effectively carry out book distribution, hybrid models incorporating both the public and private sectors, and an analysis of distribution point options (e.g., deliveries to each school, or to the zonal MoEST office and then pick-up by school personnel). (M)
- Donors should support the MoEST in incorporating track and trace, using appropriate technologies, into book distribution processes. (M)
- Donors should support the MoEST in expanding and regularly updating GIS mapping of schools, building on the work done under the USAID-funded Malawi Early Grade Reading Improvement (MERIT) project. (I)
- School accessibility by road for book distribution should be rated and monitored annually as part of the school census, and private distributors should be required to report information about school location and access as part of their delivery contracts. (I)
- Contracts for book delivery should be structured to incentivize timely, complete delivery in a 'best value' type of model, as opposed to incentivizing only the lowest price and/or the fastest delivery. (I)
- To strengthen accountability and thoroughness in book distribution members of the community and school-level organizations, such as School Management Committees and Parent Teacher Associations, should be trained to assist Head Teachers in the process of receiving and checking books. (I)
- A standard set of quality-improvement practices should be incorporated into book distribution including (I):
 - » An after-action review after each round of deliveries, to inform planning for deliveries in the subsequent year.
 - » Revised scheduling to improve the availability of essential reading materials and textbooks at the start of the school year and delivery during the dry season.
 - » Adjusted schedules when teaching and learning materials (TLMs) are new or significantly updated, so that they are available for teacher training and orientation prior to the start of the school year.
 - » Production and delivery schedules that allow time for school personnel receiving the books to check them as well as report information on shortfalls or overages.

- » Notification of school personnel in advance of a delivery by drivers or clerks, letting them know when to expect the delivery to arrive.
- » A formal redistribution process to address shortfalls and overages, starting initially at the local level to facilitate an exchange of materials between schools.

Active Use

GBA recommends the following:

- The donor community should support the MoEST in revising the curriculum to incorporate evidence-based best practice regarding the use of essential reading materials into literacy instruction, adjusting instructional planning and timetables to incorporate essential reading materials into the school day, and ensuring that the development of these materials is informed by and aligned to this curriculum. (M)
- The donor community should continue to support the MoEST in training teachers in the importance of essential reading materials and how to use them effectively in the classroom and in incorporating this into training programs, along with pedagogical coaching and mentoring for teachers. (I)
- The Book Sector Development Plan should include the steps, budget, and timeframe for ensuring that schools receive sufficient essential reading materials and that these are available for children to take home each day. (L)
- Parent Teacher Association (PTA) members should be trained in the importance and role of essential reading materials and how to support their use in the home and community. (I)
- As part of the Book Sector Development Plan, the MoEST should designate teachers and students as the custodians of the books they use during a year and provide guidance to them and to school level organizations like PTAs, Mothers Groups (MGs), and School Management Committees (SMCs) to encourage use and care of books every day. This may include training as well as the development and implementation of informational and SBCC campaigns, both nationally and at the community level, to promote reading at school, at home, and in the community. (M)

Interrelated challenges at each stage in the book supply chain prevent children from having adequate access to the high-quality reading materials they need to learn to read. Children do not have the essential tools for literacy development - key for both reading instruction and regular reading practice. The USAID 2016 Survey of Children's Reading Materials in African Languages in Eleven Countries—Final Report⁶ illustrated the stark gap in materials that children in Malawi face. In surveying all of

6 RTI International. 2015. Survey of Children's Reading Materials in African Languages in Eleven Countries – Final Report. Washington, DC: U.S. Agency for International Development.

the children's reading materials available for children in kindergarten through grade 3 across seven languages used in Malawi, the researchers identified 288 titles of reading books. Of these titles, the vast majority were far too difficult for beginning readers, with only 18 titles including ten or fewer words per page - not nearly enough titles to support the regular reading practice that builds strong literacy skills.

Although a World Bank analysis⁷ has cited books as the investment that shows "the highest incidence of impact for improving primary school outcomes in many developing countries," the supply chain for reading materials, from initial forecasting and planning through development, publication, printing, purchasing, distribution and use, is not functioning well enough to ensure that these essential inputs reach and are used by children who are learning to read. The research and recommendations in this report aim to identify key steps that can help to unlock children's access to books.

7 Boissiere, Maurice. "Determinants of primary education outcomes in developing countries." World Bank, Independent Evaluation Group (IEG), Washington, DC (2004).

INTRODUCTION

This report documents the findings of the Malawi Book Supply Chain Analysis conducted on behalf of the Global Book Alliance (GBA) by the USAID Global Book Alliance in Action project in Malawi in late 2019. The GBA team—comprising one local and four international consultants—analyzed the book supply chain for essential reading materials and textbooks for children in primary grades 1–4, drawing evidence from both the broader education sector and the book publishing sector. *Essential reading materials* include decodable readers, leveled readers, and supplementary readers (see page 2).

The report takes as a starting point research and evidence on the role of high-quality texts and materials in reading acquisition. This includes the necessity of ensuring that children have access to level- and language-appropriate books and materials, in sufficient quantity and at the appropriate time in the school year, and that teachers and parents understand and support the use of these materials for reading acquisition.

High-quality texts and materials are key elements of reading acquisition for all students. Evidence has demonstrated that successful reading acquisition requires students to access and use a range of reading materials. To ensure that every student learns to read, students require not only textbooks but also their own essential reading materials, designed specifically for reading instruction in the languages that students use and understand outside of school.⁸ Per USAID guidance⁹, a copy of every decodable text, whether packaged together in one textbook per learner or in a set of readers, should be provided to each learner in all grade one classrooms and should always be available to grade two learners. For higher grades, decodables are only a required part of this package if assessment data demonstrate that children’s reading levels are so low as to indicate a need for such material. In terms of leveled readers, when a complete set of leveled paragraphs and stories are bound together in one book, each learner should have a copy of the compilation. If materials are provided in sets of books, sets should be shared by not more than three students in a classroom. A set of leveled readers should include no less than one book per week of the school year. Supplementary readers can be provided at the classroom level. Sets should include no less than one supplementary book per week during the school year.

Primary school reading outcomes in Malawi are among the lowest in the region. As has been found in other studies, most of the available data and evidence on teaching and learning materials (TLMs) for primary students learning to read in Malawi centers on textbooks; there is a dearth of information and data related to essential reading materials. This is due less to a gap in the data than to gaps in the supply chain itself for these critically important TLMs. The findings in Malawi are also consistent with

8 USAID, *Reading MATTERS Conceptual Framework*, 4.

9 USAID 2019 Education Reporting Guidance, 2019.

previous findings that demonstrate a lack of awareness among governments, parents, and teachers of the important role of essential reading materials in children’s literacy acquisition.¹⁰

This report identifies strengths and weaknesses in each of the six links of the book supply chain and provides recommendations to ensure that learners are able to access a sufficient amount of appropriate, high-quality books in order to improve reading outcomes in Malawi.

Methodology

To conduct the analysis of the Malawian book supply chain, the GBA team spent 20 working days in the country conducting key informant interviews, surveys, secondary research, and qualitative data collection. The team also carried out desk research before and after the in-country data collection.

The team held 59 stakeholder meetings with key actors in the sector, including ministry representatives, donor personnel, implementing partners, publishers, authors, illustrators, printers, and distributors. Discussions with teaching staff were held during two school visits. During the visit to the Dowa District school near Lilongwe, the team gathered school Head Teachers, teachers, parents, community members, regional and district leaders, and women’s groups for interviews.¹¹

The research and site visit confirmed that most available data were related to textbooks. To develop recommendations on decodable, leveled, and supplementary readers, the GBA team had to extrapolate from these data.

10 Results for Development Institute, *Global Book Fund Feasibility Study: Final Report*.

11 Further details on the methodology, protocols used, and topics covered can be found in Annexes 4 and 5.

CONTEXTUAL DRIVERS OF THE TEACHING AND LEARNING MATERIALS CHALLENGE

Scale of the Teaching and Learning Materials Challenge

There is a persistent lack of decodable, leveled, and supplementary readers in Malawi. While the government has made progress, nonetheless, the education sector in Malawi faces enormous and multidimensional challenges, including inadequate school facilities, high pupil-teacher ratios, low learning achievement, and substantial capacity gaps in school inspection and supervision. The vision of the Ministry of Education, Science and Technology (MoEST) is that the sector will become a catalyst for socioeconomic development and industrial growth and an instrument for empowering the disenfranchised.¹²

The sector has experienced some progress, with an average annual primary school enrollment growth rate of 2.5% over the last 5 years, per the 2018/2019 Education Sector Performance Report published by the MoEST.¹³ The 2019 primary gross enrollment rate was 112%, with a primary net intake rate of 76.3%. However, while the primary completion rate has been increasing, it is only 58%. Repetition rates are particularly high in the early grades: 30% in Standard 1, and 22% in Standards 2 and 3.¹⁴ There has been progress in the primary pupil to qualified teacher ratio, but it remains high, at 64 to 1, and repetition rates are high in the early grades, at 30% in standard 1 and 22% in standards 2 and 3.¹⁵

TABLE 2. ENROLLMENT OF LEARNERS BY TYPE OF SCHOOL AND SEX, 2017–2018¹⁶

Grade	Public		Private		Total
	Male	Female	Male	Female	
Grade 1	543,752	541,099	11,809	12,250	1,108,910
Grade 2	429,336	432,380	9,673	9,894	881,283
Grade 3	400,650	399,127	8,728	9,099	817,604
Grade 4	313,525	321,729	7,736	7,745	650,735
Grade 5	284,281	305,093	7,246	7,281	603,901

¹² <https://www.education.gov.mw/>

¹³ Government of Malawi, Ministry of Education, Science, and Technology, *The 2018/2019 Education Sector Performance Report*.

¹⁴ Ibid.

¹⁵ Ibid.

¹⁶ MoEST, *Education Statistics 2017/18*.

Literacy outcomes for primary learners in Malawi are among the lowest in the sub-Saharan African region.¹⁷ The Malawi National Reading Program's *2018 National Reading Assessment* found the following in regard to Standard [grade] 2 and Standard 4 learners:

While Standard 2 learners demonstrated an understanding of spoken Chichewa, and many had some knowledge of letter names, they were mostly unable to make the sounds of syllables or read familiar words or a story, and very few demonstrated even basic reading comprehension. . . . Standard 4 learners demonstrated a substantial understanding of spoken Chichewa on both EGRA [Early Grade Reading Assessment] and oral reading module assessments. Scores on reading assessments were widely distributed, with many learners unable to get any items correct. While other learners were able to name letters, and read syllables and familiar words, few demonstrated high levels of oral reading fluency or reading comprehension.¹⁸

Though national policy stipulates a student-to-textbook ratio of 1:1 for all subjects across all grades, it is difficult to determine exactly how many textbooks and essential reading materials are in the hands of primary school children in Malawi, given the limited national audit data available. To understand how many textbooks would need to be supplied to achieve a 1:1 student-to-book ratio for grades 1–4, we must consider that there are 32 total titles: 7 each for grades 1 and 2, 8 for grade 3, and 10 for grade 4.

Comprehensive and consistent data on book ratios is limited, but 2018–2019 data from the MoEST Planning department indicates that, with donor support, significant progress has been made for Chichewa textbooks in the early grades. For Standard 1 the ratio is 1.4 students per textbook, for Standard 2 it is 1.6 students per textbook, for Standard 3 it is 1.7 students per textbook, and for Standard 4 it is 1.5 students per textbook. No complete data are available for the other book types, including essential readers, but it is safe to say that without immediate intervention, the need for the other book types will be far from met for the foreseeable future.

The statistics presented in Table 2 show that for grade 1 public schools alone, 7,593,957 textbooks are required across the seven subjects for the 1,084,851 enrolled children. There is no allowance for essential reading materials in these figures, which means that teachers do not have the required materials for effective reading instruction, nor do children have what is needed for successful reading

¹⁷ USAID, Factsheet: *Malawi Education Program Overview*.

¹⁸ USAID, Malawi National Reading Program, *2018 National Reading Assessment, Results of the 2018 Assessment of Standard 2 and 4 Learners in Public Schools in Malawi*, 3.

acquisition. Due to the education sector's heavy dependence on aid programs, there are some inputs from donors to help address this lack, but these efforts are not integrated into the MoEST-managed book supply chain.

Contextual Drivers

Demographics, Geography, and Climate

Malawi is one of the poorest countries in the world. In 2019, its per capita gross national income (using the World Bank Atlas method) was just US\$380. Its economy is heavily dependent on agriculture, and it is vulnerable to external shocks, particularly climatic. According to the country's 2018 Census, it has a population of 17.5 million, which is expected to double by 2038.¹⁹

This high population growth rate, coupled with the country's extreme poverty, poses a double challenge for the planning and provision of educational services, including supplying books for students. Malawi's weather-related issues also damage book stocks and complicate distribution efforts. Cyclone Idai, which struck in March 2019, was particularly devastating; Malawi's education sector was one of the hardest hit by this natural disaster. In November 2019, the Minister of Disaster Management Affairs stated that the government needs over K9 billion [US\$12.4 million] to replace the textbooks destroyed by the cyclone.²⁰ USAID's MERIT (Malawi Early Grade Reading Improvement Activity) reported that 62,567 learner's books and teacher guides were destroyed and that 152 schools were affected by the related floods; learning in 114 schools was interrupted for several weeks.²¹

Poor-Quality Education

The education sector in Malawi faces grave challenges. Vision 2020, the nation's first long-term development plan, found that while access to education in the country has improved, the quality of the education has deteriorated. This is largely due to infrastructural challenges in both primary and secondary schools²² and inadequate learning materials, particularly "in rural areas [where] teachers may not even have chalkboards, let alone textbooks."²³ Malawi's *2017/18 Annual Statistical Report on Education* highlights these infrastructural challenges, which also include 56,000 teachers without institutional housing; classes conducted in open spaces, which increases wear and tear on TLMs; and almost 31% of schools lacking access to safe water.

19 The World Bank in Malawi, *Overview*, 1.

20 Chauluka, Jameson. "Government Needs K9 Billion for Learning Materials." *The Times Group* (November 18, 2019). <https://times.mw/government-needs-k9-billion-for-learning-materials/>

21 RTI International, *Assistance to Basic Education: All Children Reading*, 5.

22 Mzungu, *Malawi poor infrastructure in public schools shocks EU*.

23 Ng'ambi, *Malawi: Effective Delivery of Public Education Services*, 9.

The poor teacher-to-pupil ratio is extremely detrimental to learning. Given this ratio, TLMs are of key importance, yet teachers in Malawi lack instructional materials and pedagogic support, and learners lack textbooks and essential reading materials. Eighty percent of schools are not visited by inspectors, and 31% of schools are inaccessible during the rainy season (mid-November to April), which severely limits options for both book delivery and physical verification of the stock of all types of books in classrooms.

The lack of infrastructure, trained teachers, and TLMs in the classroom have all contributed to poor metrics on key indicators, including primary repetition rates of approximately 25% and primary completion rates of just over 50%.

TABLE 3. KEY EDUCATION INDICATORS²⁴

	2014–2015	2015–2016	2016–2017	2017–2018
Total primary enrollment	4,804,194	4,901,009	5,073,721	5,187,917
Boys	2,398,605	2,439,605	2,513,876	2,565,344
Girls	2,405,589	2,461,404	2,559,845	2,622,290
No. of primary schools	5,738	5,864	6,065	6,201
Public	5,415	5,470	5,552	5,619
Private	323	394	513	582
Net enrollment rate—primary	102	98	88	
Boys	101	97	87	87
Girls	103	99	89	92
Quality indicators				
Pupil-to-teacher ratio—primary		74.3	71.3	66.8
Pupil-to-qualified-teacher ratio—primary		79.5	76.9	70
Pupil-to-permanent-classroom ratio—primary		122	121.4	120.9
Primary completion rate		51	53	52
Boys		55	55	54
Girls		47	51	51

24 MoEST, *Malawi Education Statistics 2017/18*.

	2014–2015	2015–2016	2016–2017	2017–2018
Transition rate to secondary		35	38.4	38.4
Boys		33.5	40.9	40.9
Girls		36.4	35.8	35.8
Repetition rate—primary (grades 1–8)		23.4	23.9	24.5
Boys		24.1	24.5	25.1
Girls		22.7	23.3	23.9
Equity indicators				
Gender Parity Index (for primary enrollment)		1.002	1.01	1.0
Percentage of special needs education students (primary)		2.4%	2.9%	3.35%

Corruption

Malawi suffers from high levels of corruption. In 2019, the country had a Transparency International ranking of 129 of 180 economies.²⁵ The 2013 “Cashgate” scandal uncovered extensive financial impropriety by Malawi government ministers and civil servants through the country’s Integrated Financial Management Information System platform. Over the space of six months, it was reported that the state was defrauded of US\$32 million. Government systems were found to be vulnerable to large-scale theft, with basic checks and balances largely flouted.

Consequently, several donors withheld external assistance until it could be established that government systems were sufficiently protected against a possible repeat of similar fraud. The impact in the education sector (including the provision of books and materials) has been significant, with donors significantly limiting support in the wake of the scandal. Between 2013 (when the scandal hit) and 2014, total development assistance to Malawi dropped by 13%.

In the education sector, many donors had been using a pooled funding mechanism but then suspended their aid disbursements due to distrust of the system. Some key donors “withdrew from funding through the government system, but then started channeling funds through various non-governmental organizations (NGOs) and INGOs, and through private contractors.”²⁶ These donors established and continue to use parallel mechanisms to disburse their support, as they “wish to

25 According to Transparency International’s “Corruption Perceptions Index” (<https://www.transparency.org/en/countries/malawi#>).

26 Adhikari et al., *Foreign aid, Cashgate and trusting relationships amongst stakeholders*, 10.

maintain a separate financial record of their funding, which shows they lack trust in the Government system.²⁷ However, parallel support for the education sector serves as a constraint to the development of a comprehensive national book supply chain for essential reading materials, although coordinated joint planning can mitigate this.

The result is a system in which donors are firefighting to fulfill children’s reading needs with funding that goes around, rather than through, the Government of Malawi (GoM). As a result, education support, including book provision, has been carried out through parallel mechanisms rather than through the Ministry’s systems, complicating the establishment of a jointly developed strategy that would eventually lead to the GoM’s gradual assumption of responsibility for book supply, with a long term exit plan from book aid for donors.

One promising development is the 2017 establishment of the Education Services Joint Fund, signed by the GoM, the Governments of Norway and Germany, the World Bank, UNICEF, and the Department for International Development (DFID). This is not a return to full governmental budget support, but it provides earmarked support to priorities in the education sector and includes externally contracted oversight and control provided by a fiduciary agent.²⁸

Transportation Infrastructure

All book deliveries within Malawi are made by road, but centralized, accurate, and comprehensive data on school locations and accessibility via road are not widely available to inform distribution efforts. According to recent assessments, only 45% of the country’s roads (6,956 out of 15,451 km) are paved. The African Institute of Development Policy *2017/18 Statistical Report* stated that many schools are less than 5 km apart, but almost 31% are not accessible during the wet season (mid-November to April), when many of the unpaved roads become difficult to traverse. All of this significantly limits the timeframe and capacity for book delivery.

Electricity

In 2016, only 11% of the total population had access to electricity, meaning that 89%—17 million Malawians—were without access. Rural areas fared the worst, with 96% of the rural population having no access to electricity. Even in urban areas, only slightly more than half the population (58%) had access. In 2017–2018, 75% of primary schools in Malawi had no power at all, 16% used the power supply by the Electricity Supply Corporation of Malawi, and 9% used solar power.²⁹

27 Adhikari et al., *Foreign aid*, 11.

28 Norway in Malawi, *Launch of the Education Services Joint Fund and Common Fiduciary Oversight Arrangement*, 2017. <https://www.norway.no/en/malawi/norway-malawi/news-events/news2/launch-of-the-education-services-joint-fund-and-common-fiduciary-oversight-arrangement/>

29 Malawi 2017/18 Annual Statistical Report on Education.

The lack of electricity is indicative of the country's high levels of poverty and limited resources and infrastructure, all of which are challenges to a functioning book supply chain at the national level and to the ability of individuals and households to obtain and use books.

Connectivity

Many of the challenges of running an efficient book supply chain rely on accurate data collection and the ability to track book deliveries to schools and learners. Globally, the move toward Web-based and digital data collection is progressing rapidly, as is the use of technology to increase access to learning materials. However, limited connectivity in Malawi remains an obstacle. Access to essential reading materials via digital formats, either at school or at home, is not an option for most learners due to connectivity challenges.

According to the 2015 National Survey on Access to and Usage of ICT [Information and Communications Technology] Services in Malawi, 85% of households in the country have cell phones. The same survey indicated that the proportion of households with Internet access nationwide is 6.5%; in rural areas, it is 3.4%; and in urban areas, 29.4%. The total cost of mobile ownership for the medium-usage basket (1 GB of data, 250 minutes of voice, and 100 SMS) would amount to 121% of the average monthly income; even the cost of the low-usage basket (500 MB of data) was 22% of the average monthly income,³⁰ making mobile ownership far out of reach for many individuals. Voice-only plans are more affordable, with Airtel, for example, offering a 30-day packet with 400 minutes for approximately US\$4.60, and a 30-day packet with 3,000 minutes for approximately US\$13.30.³¹ The cheapest mobile phone costs approximately US\$9, and the cheapest smartphone costs approximately US\$55—which must be considered in the context of the average net salary of teachers (US\$160/month) and Head Teachers (US\$215/month).

Payment for school connectivity is based on commercial rates and agreements and occasionally reliant on negotiation. Of late, providers such as TNM,³² Airtel³³ and Skyband³⁴ are providing bandwidth to higher education institutions, particularly to their libraries. However, the number and proportion of primary schools with Internet connection is still extremely low.

30 International Telecommunication Union (ITU), *Measuring the Information Society Report, Volume 1*, 84; ITU, *Measuring the Information Society Report, Volume 2*, 106.

31 Airtel Local Call Plans, <https://www.airtel.mw/local-call-plans>.

32 Telekom Networks Malawi (TNM) PLC, *About*, <https://www.tnm.co.mw/-/about/company-profile>.

33 Airtel Malawi, *Company Overview*, <https://www.airtel.mw/home/aboutus>.

34 Skyband, https://www.skyband.mw/?page_id=85.

BOOK SUPPLY CHAIN ANALYSIS

Supply Chain Overview: Six Strategic Phases

An effective book supply chain requires accurate forecasting and planning, high-quality title development in languages and formats that children can use and understand, access to those titles by publishers and printers, functioning systems for the acquisition and distribution of books, and appropriate knowledge and support to ensure use and build a population of active readers.

It is important to note that a functioning book supply chain can be achieved via different combinations of public and private sector roles and divisions of labor.

Figure 2 highlights the major challenges and breakdowns in the Malawi book supply chain and their interrelated nature.

FIGURE 2. PHASES OF, ACTORS AND ACTIONS IN, AND BREAKS IN THE MALAWI BOOK SUPPLY CHAIN.



There is no one-size-fits-all model that works best in all contexts to ensure that children have access to and can use all types of books that are needed for successful literacy acquisition. Throughout this report, the GBA team has included information on different options to consider and has suggested areas for further analysis. Annex 7 includes relevant preliminary findings on public-private partnership opportunities, and the forthcoming Malawi Partnerships Assessment will include further GBA work on this topic.

Given the many broken links in the book supply chain in Malawi, no single track of action will address all the challenges. What is needed to deliver essential reading materials to children in the short term will not, in and of itself, lead to a functioning market in the medium and longer term. In addition, addressing any one challenge in any given timeframe does not necessarily address the others and, in the short term, may exacerbate other challenges unless actions are planned and sequenced with care. The Book Sector Development Plan must address each challenge and must be comprehensive, carefully sequenced and phased, and designed to proceed along several lines.

The Malawi Book Supply Chain Analysis (SCA) examined the six strategic phases of a book supply chain. Each phase is considered in detail and includes a summary of the GBA team's research, the team's findings on strengths and weaknesses, and the team's recommendations.³⁵

SCA Phase I: Planning and Forecasting

Planning and forecasting is recurring, cyclical work carried out by both governments and publishers to assess the need and demand for books and to arrange for the financial and material resources to meet that demand. To do this, Ministries of Education need timely information on both current and projected school enrollment and realistic estimates of book wastage over time. Publishers must plan for and be prepared to respond to demands from ministries and schools, as well as parents, who may purchase books for their children's reading practice. For both the GoM and publishers, the collection, management, analysis, and use of data related to the need and demand for and provision of books is an integral part of planning and forecasting. Accurate and timely data collection is of key importance for a functioning book supply chain.

In Malawi, there is no MoEST planning and forecasting around the essential reading materials required for learners' reading acquisition; therefore, the team's findings relate to textbook processes and were used to inform the recommendations in regard to essential reading materials.

Estimating Demand

MoEST's Department of Education Planning (DEP), Department of Education Management Information Systems (DEMIS) (which is part of the National Statistics Office), and Department of Basic Education

35 See Annex 1 for the recommendations organized by timeframe.

(DBE) estimate book demand. As noted, the system currently focuses entirely on textbooks and does not address the critical need for planning and forecasting for essential reading materials.

However, ongoing updates and improvements to the system could be further developed and expanded to include data on the number and type of books. Additionally, digitalization of data at the point of collection could reduce the timeframe for reporting, eventually to real time. Transforming this data into accurate supply orders will reduce the time required for the DEP to forecast demand by at least nine months. Books could then be supplied to schools using the previous year's enrollment rather than two-year-old registration data. These changes would allow the planning process to address all types of books, as well as provide more up to date data to enhance accuracy in book planning.

Prior to the 2019–2020 school year, data were gathered from schools through a paper-based system using a questionnaire modeled on a design by UNESCO. The District Education Office printed the questionnaires and distributed them to the school Head Teachers and teachers at meetings, where participants were briefed on the questionnaire. Head Teachers then had three weeks to complete the form, which included data on registration, facilities, teachers, classes, and grades, but not on numbers and types of books used. However, questions on this could be added going forward. This would greatly increase the utility of this existing data collection process.

Primary Education Advisors collected the completed forms, with one copy going to the District Education Office and one retained for the school's records. It took at least 12 weeks for the completed questionnaires to get from the school to the DEP and involved three stages of manual data entry, increasing the probability of errors and inaccuracies. The District Education Office copy was then passed to MoEST, where DEMIS officers manually entered the data. These are the data the DEP ultimately used to assess demand and make forecasts.

There is currently a promising update underway in the form of the introduction of a digital system. For the 2019–2020 school year, the district piloted a new Web-based app supplied under the USAID-funded Malawi Yesani Ophunzira (Assess the Learners) (YESA) project by Souktel,³⁶ and used public domain software, CPro (Census and Survey Processing System), to collect the data. Under this new system, the printed questionnaires were sent from the central ministry to the districts. After entering and analyzing the data from the forms completed by the Head Teachers, the District Education Managers sent the data to DEP personnel who, together with the National Statistics Office, cleaned the data and entered them into the Education Management System (EMIS), which sends an alert when mistakes are made during data entry.

While the pilot appears promising, the DEP personnel the GBA team interviewed in Lilongwe and the DEMIS staff interviewed in Blantyre expressed reservations about the new system, reporting that they needed more training and more operators to use it effectively. Similarly, the MoEST Chief Statistician reported that he is short of trained DEMIS staff, which makes a true test of the efficacy of the new

36 Souktel is a software subcontractor on the USAID-funded YESA program (<https://www.souktel.org/>).

system impossible. Expansion of the pilot and training of additional EMIS personnel could address these issues.

Forecasting

The most problematic issue in regard to forecasting is that the process currently addresses only textbooks and not essential reading materials; it will therefore need to be adapted to include these materials. Another limitation is that the supply of textbooks is a function of the number of pupils registered in the previous school year.

In order to address this, the DEP plans to introduce a formula for book replacement calculations. As part of the National Reading Program, USAID will print textbooks in a 1:1 plus 20% book-to-student ratio, with replacement beginning in year 3. This “1:1 plus” ratio is a good practice; it can help ensure that not only will each learner have a book, but also that books will be available for students who enter school late or change schools during the year. It also addresses the need to replace books that are lost or damaged in the course of the school year.

The new data-collection system described above may also improve the accuracy of the forecasting process.

GBA Findings: Planning and Forecasting Strengths

- Aspects of the current system, such as the shift away from hard-copy data collection, could be adapted and expanded for planning and forecasting related to essential reading materials, with little additional expense.
- The new digital system that was piloted—the USAID YESA project’s Web-based app and the CSPro software—has the potential to lead to significant improvements in the planning and forecasting system. Reducing the amount of manual data entry will increase the accuracy of the data. Questions on the number and types of books used could easily be added, and training on data collection and analysis could be provided to DEMIS and MoEST staff.

GBA Findings: Planning and Forecasting Weaknesses

- Planning and forecasting processes are focused only on textbooks and do not include essential or supplementary reading materials.
- MoEST relies only on its own registration statistics for forecasting. However, these data are unreliable as the sole basis for forecasting, as they are one-time figures and do not incorporate data on children enrolling, relocating, or dropping out throughout the school year.
- Registration data are copied manually as they are consolidated and passed from school to district to the EMIS, resulting in many data-entry errors. A more automated digital system would flag the errors, thus leading to more accurate data to inform book planning and provision.

GBA Recommendations: Planning and Forecasting

GBA recommends the following:

- The donor community should prioritize supporting the MoEST to expand its planning and forecasting processes to include sufficient numbers of high-quality essential reading materials as well as textbooks.
- The MoEST and donors, through the JBDWG, should assess the ongoing transition to digitalized data collection for opportunities for further expansion, such as via the work of the USAID YESA Project. GBA recommends including data on book types and stocks, integration with enrollment data, and, with additional training, potentially data collection at the school level via feature or smart phones. Periodic verification of books stocks via options such as apps, SMS, calls, WhatsApp, and photos can be valuable given personnel and resource constraints, as well as weather and road conditions, which limit opportunities for physical verification.

SCA Phase II: Title Development

Title development refers to the creation of texts and books intended to support acquisition of reading skills in languages children use and understand. The process of title development begins once an author has been selected (or in some cases, a complete manuscript has been chosen for publication) and continues until the final pdfs of the book are sent to the printer. It is a process that calls upon the skills of pedagogical experts, writers, editors, graphic designers, illustrators, proofreaders, page layout specialists, and others. The function of title development for Essential Reading Materials can be carried out by publishers, whether State or private, and as is often the case in developing countries, by donors and NGOs, who step in to provide these materials where they do not exist.

Writing Basic Education Teaching and Learning Materials

During their research, the GBA team found detailed information about textbook development, which is summarized in this section. However, as in the other phases, information on the development of essential readers was limited. The team could use some of the available data on textbooks as a basis for extrapolating recommendations for the development of essential reading materials, yet it is important to emphasize that writing different types of books requires very different technical skills. Capacity in textbook writing does not equate to capacity for the development of essential reading materials, so the information provided below is again a guide for extrapolation to recommendations regarding the development of essential readers.

There are two systems for developing textbooks in Malawi: a centralized system for basic education, and a system that relies on the private publishing sector for secondary education. The MIE plays the roles of writer, publisher, and assessor for primary textbooks. Within the MIE, textbook authors—usually teachers, subject matter specialists or lecturers—are recruited on a task-by-task basis by advertisement

in the local press. They are then divided into writing panels and through a series of workshops produce texts with recommendation for illustrations. Designated MIE staff are responsible for graphic design, illustrations, and physical specifications for the textbooks, according to the national standards. An MIE committee reviews the finished manuscripts, which then pass through a final proofread and go to press.

Writers and illustrators who are not GoM employees are paid a flat fee, and the copyright for each work belongs to the MIE. If the writers and illustrators are GoM employees (as in the case of teachers), they do not receive extra payment from MIE other than an attendance allowance for the workshop. The TLMs produced by MIE are not subject to royalties, which enables the MoEST to reprint books without further writing costs.

There are signs of a potential transition to privatization of the development of these materials. For example, for grades 5 and 6 textbooks, the MIE has signaled a move away from the textbook development process currently used for basic education and toward the secondary school textbook development process, in which title development is outsourced to the private sector. However, during the process of researching and writing this report, this plan was put on hold for months before being reactivated, indicating continuing uncertainty around the extent and timing of this transition.

As noted above, the previous information and processes are focused solely on the development of textbooks. Writing primary-level essential reading materials requires specialized expertise and knowledge of the research on how children learn to read, the primary school curriculum and reading methodology used, and the specific role and characteristics of decodable, leveled, and supplementary reading materials. For example, all words in a decodable reader must be consistent with the letters and corresponding phonemes that students have been taught. Writing leveled readers, where sets of books are organized by level of difficulty, requires specialized understanding of the complexity of words, sentences, and content. This knowledge and expertise is currently limited in both the MIE and the publishing sector.

There has been important progress in the development of essential readers via the donor community. Essential reading materials have been supplied and funded in limited amounts through the MIE with the active support of donors and Development Partners and by NGOs and Development Partners themselves, who publish and distribute the materials independently of the MIE. For example, the Strengthening Early Grade Reading in Malawi initiative and MERIT, both funded by USAID, supported MIE in the writing of early-grades readers. During 2018 and 2019, under MERIT, 32 grade 1 readers in Chichewa, 18 Standard 2 readers in Chichewa, and 16 Standard 2 readers in English were developed. Such publications usually comprise small print runs and require MIE approval for incorporation into the general provision of school books. In cases where donors have supported development of limited numbers of essential reading materials, such as under SEGREM and MERIT, the focus has been on products developed in country and in tandem with MIE. This is critical given the need to expand the development of primary grade essential readers for schools and homes, to build capacity in the

specialized skills needed to develop these readers, and to have materials in Chichewa and other local languages for early grade students. These factors make expanded development of essential reading materials in Malawi a priority.

There are a variety of possible models for expanded in-country development of these materials, ranging from full development by the private sector as per MoEST guidelines, to full development in house by MoEST, to varying mixed models. In one model, very specialized materials (e.g., first-grade decodable readers) are developed by the textbook authors for those grades, while leveled readers and supplementary reading materials are developed by other writers. Some countries, including Kenya, Senegal and South Africa, offer a larger role for private sector publishers in title development, a less centralized system, and multiple-choice book selection. Ethiopia is also moving toward more private publisher involvement. GBA recommends further examination of a transition to one of these models in Malawi, including examination of the cost, benefits, technical capacity building considerations, timelines, and economic impact of each.

This analysis is especially important given the need to both ensure that learners have access to essential readers as soon as possible, while also developing MoEST and private sector capacity to produce these materials and stimulating demand to create a market for them, which are longer-term processes.

As part of this process, stakeholders should also explore other sources of leveled readers. An analysis of the cost and benefits of importing English language essential reading materials for use where appropriate, depending on the age of the learner and the purpose of the book, would be useful, particularly if Malawian publishers can join the print runs of other countries and negotiate prices. For example, best practice does not support the direct translation or adaptation of decodable or levelled readers, but it may be worthwhile to assess options for adapting and versioning storybooks into Chichewa. During the interviews, no local publisher mentioned international publishing agreements as a source of essential reading materials, but it is worth noting that some Malawian publishers were founded as agencies of large British and American international publishers.³⁷ This cooperation has been focused on textbooks to date, but expansion to include essential reading materials could also be explored.

Digital content, which is rapidly expanding, is another source of essential reading materials. There are, through Creative Commons, an increasing number of openly licensed materials available for access on digital platforms such as the [Global Digital Library](#), [African Storybook](#), [Pratham Books](#), and [Let's Read](#). The lack of Internet connectivity in Malawi is a significant barrier to use and such content in Chichewa is currently limited, but nonetheless this is another source of essential reading materials to consider. Digital platforms are steadily increasing the number of languages represented (enabled by, in the case of the Global Digital Library, strong donor support), and these platforms allow stakeholders to adapt

37 For example, Jhango Publishers was founded by Heinemann, and Bookland International was founded by Macmillan Publishers.

previously produced materials into local languages, including Chichewa. While access to digital content will continue to be an obstacle in the short term, local printers could print and sell the materials, while medium- and longer-term plans should include provisions for increasing access to and use of digital content.

Royalties and Copyright

The May 2016 *Survey of Children’s Reading Materials in African Languages in Eleven Countries—Final Report*, produced under USAID’s EdData II project, reported:

The use of open licensing is not yet widespread in sub-Saharan Africa, and neither is the use of clear labeling on copyright status and conditions for re-use. The results from the DERP Reading Materials Survey show that 40 percent of surveyed titles have “All Rights Reserved”. In contrast, only 7 percent of all titles surveyed are licensed under Creative Commons. A very large percentage of titles did not contain any explicit statement regarding conditions for re-use.³⁸

The Malawi results were in line with these overall findings. Though 82% of the materials surveyed had a copyright symbol, only 25% of materials included an “All rights reserved” statement, and only 7% had a Creative Commons license. Two percent had a statement regarding permissions, and 65% had no explicit statement on permissions.³⁹ This can signal a lack of knowledge of best practice in the book sector or the absence of clear copyright legislation, which the Joint Book Development Working Group will need to address. It is important to note that unclear or unenforced copyright legislation increases vulnerability to book piracy,⁴⁰ which, given the corruption challenges in Malawi, the Working Group will also need to address.

Multiple donors support the use of Creative Commons licensing, and it has a key role to play in addressing the gap in essential reading materials. However, it is not the only model that makes sense to consider. The current lack of any kind of market or incentive for essential readers makes it in some ways harder to recognize the market considerations that need to be taken into account, but GBA recognizes that the development of essential readers have upfront costs. This is important to take into account in the analysis of options and models for title development in order, in the medium and long term, to create a stable market for essential reading materials that truly incentivizes their development. As mentioned above, there is no one solution that will fully address this issue; GBA suggests the Book

38 RTI International, *Survey of Children’s Reading Materials in African Languages in Eleven Countries*, 6.

39 Ibid, 42.

40 Ibid, 42.

Sector Development Plan include further analysis around copyright and licensing options including those at use in models such as those described earlier in the section.

GBA Findings: Title Development Strengths

- The USAID-funded MERIT developed essential reading materials in tandem with MIE, building materials-development capacity among MIE personnel.
- Private publishers in Malawi have demonstrated their capacity to respond to demand and to develop and produce secondary school textbooks aligned with the curriculum. This indicates their potential capacity to develop essential reading materials, if demand is stimulated in order to create a market, and capacity building is provided.

GBA Findings: Title Development Weaknesses

- Due to the lack of government funds for essential reading materials, private publishers have not been engaged in developing these materials and lack the capacity and incentive to produce them in either print or digital formats.
- Potential publishers of essential readers are constrained by the fact that the private market for children's books is virtually nonexistent; donors and their Implementing Partners (IPs) are the only significant purchasers of essential readers.
- Due to this absence of a significant public or private market for essential reading materials, publishers have no incentive to develop capacity in this area.

GBA Recommendations: Title Development

GBA recommends the following:

The MoEST, with donor support, should incorporate into the Book Sector Development Plan:

- A non-transferable budget line for essential reading materials within the overall MoEST budget, so that these materials (and not just textbooks) are part of the budget. This will need to be financed initially by donors but should include a commitment and plan for a gradual transition to GoM funding.
- An assessment of current and potential book development capacity in both the MIE and Malawi's publishing sector, including a desk review, site visits, and interviews.
- An assessment of the various title development models in the region, including the costs, benefits, technical capacity-building considerations, timelines, and economic impact of each.
- A costed, phased strategy for building the title development skills needed to create sufficient high-quality essential reading materials for primary students, not only in English and Chichewa but also in local languages, including Tumbuka, Yao, Lomwe, Nyakyusa-Ngonde, Sena, Kokola, and Tonga.

SCA Phase III: Publishing and Printing

Publishing generally encompasses the contracting of authors, and all the steps of title development described in the previous section (writing, editing, illustrating, graphic design and page makeup). It also includes the ownership, licensing and marketing of intellectual property. In the case of a private sector publisher, publishing is a for-profit business. Where State publishing exists, the curriculum and accompanying textbooks are generally created by Ministry of Education staff.

Printing refers to the manufacturing process, whereby the final pdf is transformed into a printed, bound book by means of ink, paper and a printing press, and then binding equipment. Sometimes private publishers have their own printing press, but more often, they contract out the printing. In the case of a State publisher, books may be printed by a State printer, or tendered out to a private printer.

Publishing Skills and Human Resources

Authors, illustrators, and editors require training in the skills needed to develop decodable and leveled readers and supplementary reading materials that support the development of early reading skills. In Malawi, local publishers have neither experience in publishing these materials nor the capacity to do so. While Malawian publishers have created secondary school textbooks that are culturally appropriate and aligned with the curricula, this does not address the need for essential reading materials.

The responsibility of producing primary TLMs rests with the MIE and has been almost exclusively focused on textbooks. Since the government has not procured essential reading materials, there is almost no private market and only a very limited public sector market for these materials. Print runs have had to rely primarily on private purchases. Bookland International, a local publisher interviewed for this report, stated that a print run of a thousand copies might take three years to sell.

In order to address these issues, GBA recommends, as previously noted, that the provision of essential reading materials be part of an integrated book strategy and eventually paid for by allocating a non-transferable budget line for essential reading materials within the overall book budget. In other countries,⁴¹ the provision of essential reading materials has been stimulated by interventions that introduced competitions with national and international submissions—through local publishers—and guaranteed minimum orders that underwrite the publishers' risk. By negotiating copyright agreements between national and foreign publishers, national publishers can produce their own reading materials, adapt them as necessary, and supply the demand by printing locally. GBA also recommends drawing on the experiences and lessons learned from the work of GBA member Association for the Development of Education in Africa as well as the Rwandan's Children Book Initiative implemented by Save the Children, which supported publishers to produce and distribute high-quality, age-appropriate children's books in Kinyarwanda.

41 See, for example, the World Bank programs READ Mongolia (<https://www.worldbank.org/en/news/feature/2010/07/29/mongolia-rural-education-and-development-project>) and READ Papua New Guinea (<https://www.worldbank.org/en/results/2016/05/12/papua-new-guinea-reading-for-a-better-future>).

Printing and Binding

Printers in Malawi have machinery suitable for a variety of work and print runs. Whether collectively or solely, printers are able to accommodate multimillion copy runs for programs such as EGRA and MERIT, for MIE, and for small niche publications, such as those for USAID’s Reading for All Malawi (REFAM) program.⁴²

The blueTree Group, which has a regional office in Kenya, has worked with a number of donor projects, including EGRA and MERIT, to build the capacity of Malawian printers in several areas, including technical upgrades in the processes of pre-press, press, and post-press, and offering guidance on quality control, production methods, and scale. The blueTree group has also offered one-on-one individual support to printers on such topics as floor plans, equipment, and investment options.

Two financial factors hamper printers in providing smooth service for the book supply chain: (1) The GoM taxation system works against local production, and (2) the GoM frequently does not pay its bills on time. Both are significant challenges to the printing sector and are addressed in detail in SCA Phase IV: Purchasing.

The lack of coordinated and long-term planning for book printing and publishing is another challenge, since printers have to plan their resources (as paper has a lead time), staff, and equipment to be able to respond effectively to demands.

Production of Books for Learners with Disabilities

As per MoEST data, in 2018 the number of primary students with special needs was estimated to be 175,051⁴³. While some children with disabilities attend specialized schools, and some receive additional instruction outside usual class hours in “resource rooms,” there is a severe lack of schools with these additional facilities, and many children with disabilities attend mainstream primary schools.⁴⁴ Additionally, there is a lack of assistive learning materials in Malawi. For example, until recently the country had no large-print textbooks, which creates information-access difficulties for children with visual impairments.⁴⁵ Malawi also lacks adequately trained special education teachers. All these challenges compromise effective learning and communication for children with disabilities in most schools (and even in the resource rooms), and the result is an increased risk of exclusion of these children.

42 REFAM is a USAID-funded program that provides access to learning materials for young children with visual, hearing, or intellectual disabilities, especially girls, in Standards 1–4.

43 MoEST, *Malawi Education Statistics 2017/18*, 27–28.

44 Chataika, Kamchedzera, and Semphere, *An Exploration of the Challenges Faced by Regular Primary School Teachers in Planning Instructional Strategies for Inclusive Classrooms*, 13.

45 Mkandawire, Maphale, and Tseeke, “A Comparative Assessment of Special Education Situations Between Lesotho and Malawi,” 182.

The production of books for children with special needs is heavily reliant on donor funding, such as USAID’s REFAM and MERIT. MERIT has printed limited numbers of supplementary readers in large-print and Braille editions; in November 2018, MERIT supported the MoEST in holding a pilot reading competition for children from three schools for the deaf. Likewise, the Malawi Union for the Blind received donor funding to print books in Braille after lobbying for new books for children who are blind to be included in the new curriculum.⁴⁶ Fewer than five local printers are able to respond to specialized production for children with blindness or low vision but are not able to do this at a large scale, as they are constrained by the use of outdated technology.

GBA Findings: Publishing and Printing Strengths

- The printing and publishing industry has expanded rapidly in the last 10 years and is well-positioned for capacity development in publishing essential reading materials.
- The MIE’s tentative steps toward involving the private sector in the development and production of primary textbooks for grades 5 and 6 may signal a transition to a more hybrid public-private model for primary school TLM, and potentially could be expanded to include essential readers.
- MIE has successfully piloted a model for training courses paid for by private publishers, which could be a model for adapting, expanding, and otherwise building capacity to publish essential reading materials.

GBA Findings: Publishing and Printing Weaknesses

- The Malawian publishing industry does not have strong capacity to publish essential reading materials or experience in doing so.
- There is currently no true market for essential reading materials in Malawi; donors and their IPs are basically the only customers.

GBA Recommendations: Publishing and Printing

GBA recommends the following:

- The Book Sector Development Plan should include a detailed assessment of local publishers’ needs related to producing sufficient high quality essential reading materials for primary school grades and related training priorities, plans, and timeframes.
- Per the findings of this assessment, the Book Sector Development Plan should include efforts to increase the role of the private sector, including the local publishing industry, in the development of essential reading materials.

⁴⁶ Meeting notes, November 25–29. Roel de Haas 6.12.2019

- The MoEST and donors should explore and adapt the experiences of countries that have successfully stimulated the market for the provision of essential reading materials for use in schools and in homes.
- Capacity building plans within the Book Sector Development Plan should include additional support to publishers and printers on the development of materials for children with disabilities.

SCA Phase IV: Procurement and Purchasing

Procurement and purchasing is the acquisition of books and texts to support reading acquisition. In the education sector, the largest procurer of books is often the government, which will select vendors, establish payment terms, negotiate contracts for per-unit and print-run prices for reading materials, and issue payment to purchase books. Procurement and purchasing may also involve non-standard financing models, such as the use of Advanced Market Commitments or purchasing consortia. Individual teachers, families, and students are also book consumers and may purchase books depending on their ability to pay for them.

Government Budgeting and Expenditures on Books

Even before the Cashgate scandal, a primary concern with book development in Malawi was uncertainty over funding. Historically, the Joint Financing Agreement and Memorandum of Understanding signed in 2010 by the Ministry of Finance, the MoEST, and Development Partners identified a number of priority areas as eligible for direct support through a pooled fund. However, when prices of goods and services rose due to the Kwacha devaluation in the 2011–2012 financial year, many eligible activities were no longer affordable.

The following year saw high donor funding, and financial management mainly concerned with issues of underutilization of budget support. Then in 2013–2014, when the MoEST was ready to scale up its expenditures, the Cashgate financial mismanagement scandal prompted most Development Partners to withhold funding. Some continued to offer “discrete support,”⁴⁷ but effectively all implementation resources were removed from government influence and control. Donors are not required to follow GoM regulations and usually stipulate that procurements will be made by IPs according to their own individual procurement regulations.

Therefore, while on paper the GoM procurement policy and processes seem straightforward, there are major issues that severely compromise and undermine this phase of the book supply chain in Malawi. The high levels of corruption unearthed by the Cashgate scandal made donors and IPs reluctant to work through GoM processes; in fact, donors and IPs explicitly avoid the existing system, preferring to work around rather than through it. Additionally, the GoM book procurement process lacks any

47 In terms of the GoM, *discrete support* means support that is not dependent on GoM financial management issues.

provisions for essential reading materials and is reliant on data with significant weaknesses (as previously described in SCA Phase I: Planning and Forecasting).

Government Procurement Policy

The GoM currently uses a central state system for providing basic education learning materials. The MIE publishes the materials but contracts out the manufacturing to private printers and then distributes the materials through the Supplies Unit.

GoM is in line with international practice in having three means of procurement, as described in Table 4. Competitive bidding can be restricted to national suppliers when the government is funding the procurement.

TABLE 4. THREE MEANS OF PROCUREMENT

Procurement Process	Financial Thresholds ⁴⁸
Shopping	Up to K30 million (US\$40,600)
National Competitive Bidding	K30 million to K500 million (US\$675,000)
International Competitive Bidding	Above K500 million

The Procurement Process

Under the GoM system, the MoEST's Specialized Procurement Unit (SPU) receives from DEP the request and the specifications for the books that are required. The SPU drafts the procurement documents and places a Request for Expression of Interest advertisement in the Malawian newspapers. The timeframe for bid submission is usually one month. Bids are checked for compliance, and qualifying bids are passed to the SPU's review committee, which scores them according to the system outlined in the Bidding Document. The winning company is announced, and all companies who submitted bids are allowed two weeks to register any objections. The winning company then negotiates the details of the contract (an integral part of the Bidding Document), financial guarantees are checked, and the contract is awarded. Payments are then expected to be made in stages, according to the terms of the contract—although this does not often happen in practice.

Terms of Payment

The GoM is slow to pay its bills. Given the significant rate of inflation in Malawi, this impacts the supplier on two levels—cash flow, and devaluation of the sum invoiced—both of which make suppliers reluctant to bid on GoM contracts. Banks are likewise hesitant to lend to companies seen as too dependent on GoM contracts for the same reasons, with loan guarantees a potential way to address this issue.

⁴⁸ These rounded exchange rate figures are current as of March 28, 2020.

The printers and distributors interviewed for this report indicated that delays in government contract payments are a serious problem for them. The hauler Allied Freight said that regardless of how well payment terms were captured in the contract, payments were often eight months late and following that they would be unilaterally split into further delayed tranches without any opportunity for renegotiation.

Personnel from Print Care, a local printer, provided additional examples. In one case, their contract stated that payments were to be made 30 days after delivery of goods, but it took 60 days for only 10% of the payments to be made and almost eight months to receive the full payment. As a supplier, this delay in payment deeply affected their cash flow since they had already purchased the raw materials, paid the staff, and met other costs. In another example, MIE claimed that they were waiting for payments from UNICEF before they could pay their suppliers. However, Print Care discovered that UNICEF had already made the payments, but MIE had used the funds for other purposes. In a final example, after having paid their suppliers in USD, Print Care was paid in Kwacha four months after invoicing, resulting in a large currency exchange loss.

Import Tax and Value-Added Tax (VAT)

The printers interviewed for this report⁴⁹ told the GBA team that they have individually submitted letters to the Malawi Revenue Authority showing that the tax on imported paper (10%) combined with the VAT (16.5%, and reclaimable) makes their production costs uncompetitive with printers in Dubai and India, who avoid the duty by printing overseas and importing the (tax-exempt) finished books into Malawi. The printers have unsuccessfully petitioned GoM several times for a system under which printers could receive a refund of the import taxes. Additionally, a tax refund from the government can take up to two years to be paid. Donors may be able to manage within these parameters, but for local printers, these factors serve as barriers to participating in the market.

In order to address this, the donor community could provide technical assistance to the GoM and the industry through an analysis of the impact of the tax on imported paper on the local printing sector. It could also support the development of potential options for a revised taxation structure that does not undermine local printers but permits the government to recoup needed revenue.

Another challenge is that printers do not have a strong trade association in order to lobby as an industry. Competition between local printers, the limited opportunities and market for printing books and educational materials, the lack of progress around addressing late payments, and the taxation structure have all been barriers to effective collaboration. However, the issues of late payment and taxation affect all local printers and can serve as starting points around which to begin to develop collaboration in the sector. The engagement of the donor community can provide momentum and technical assistance in this effort. Donors can play a key role by working to strengthen the public financial management system, and providing specialized technical assistance to analyze costs and

⁴⁹ See Annex 7: List of Persons Interviewed for details.

benefits of local versus international printing and the economic and logistical impacts of a robust local book printing industry.

GBA Findings: Procurement and Purchasing Strengths

- Even in the wake of the Cashgate corruption scandal, education sector support has continued through mechanisms such as the Education Services Joint Fund and from individual donors, albeit in many cases through their own systems and IPs.
- The Common Fiduciary Oversight Arrangement, established jointly with the Education Services Joint Fund, which includes externally contracted oversight and control, provides a possible model for supporting a gradual transition toward GoM processes and away from parallel donor and IP systems.
- The new administration and the civil service reform underway are potential opportunities for strengthening public financial management and the GoM purchasing system.

GBA Findings: Procurement and Purchasing Weaknesses

- GoM purchasing processes are focused solely on textbooks.
- Governmental corruption has led to mistrust between donors and the GoM, which has negatively impacted resources for the book sector. In particular, it has led to the use of separate mechanisms by donors, which has complicated efforts toward integrated planning and prioritization of book sector needs, and has limited opportunities for capacity-building within the MoEST.
- The lack of long-term budget predictability has hampered planning and the ability of the GoM and Development Partners to create a roadmap for the eventual transition to governmental financial responsibility for the book supply.

GBA Recommendations: Procurement and Purchasing

GBA recommends the following:

- The GoM and donors should continue work to strengthen the public financial management system in order to rebuild trust and permit predictable donor funding that will allow for cooperative planning and timely GoM payments to vendors.
- Donors should work with the GoM to analyze what steps need to be taken in order to meet requirements for providing direct budget assistance and a plan to gradually achieve them over time, as well as how to accountably provide support in the meantime.
- Donors should provide specialized technical assistance to support an analysis of costs and benefits of local versus international printing, including the impact of the tax on imported paper on the local printing sector and potential options for a revised tax structure.

- The Book Sector Development Plan should include a framework that will allow the GoM over time to consistently allocate a set budget percentage for the purchase of essential reading materials.
- Donors and the MoEST should explore investment in community approaches that involve local councils, alumni, parents and small NGOs or projects that could mobilize resources to purchase books for students to use at home. These actors could also champion book procurement and accountability within these processes at the local level, while promoting the local publishing industry.

SCA Phase V: Distribution Management

Distribution management encompasses the organization, oversight, and activities involved in moving books from the point of origination to the point where learners access them, and includes packaging, inventory, warehousing, and logistics.

Even when challenges related to title development and procurement have been addressed, books may not make it to the classrooms and the children they are intended to benefit. This can happen for a myriad of reasons, including challenging conditions of climate and geography, inadequate transportation infrastructure, unrealistic distribution budgets and timelines, corruption in the supply chain, and more.

MoEST Supplies Unit

The MoEST has its own Supplies Unit, which receives finished and pre-packed books from the printers and distributes them nationwide. However, recent procurements have been funded by donors either directly or through IPs and haven't involved MoEST. In the wake of the Cashgate corruption case and donor limitations on funding to the GoM, IPs have generally contracted printing and distribution themselves. This is often done through one contract for printing and distribution, in which case printers may take responsibility for distribution by subcontracting to private logistics and distribution companies. Under these circumstances, printers select the distributor from the private sector, and the distributor delivers directly to schools.

Books published by the MIE without donor support are delivered from the printer to the MoEST Supplies Unit. The Supplies Unit is responsible for delivering MoEST supplies to schools, such as school desks and other furniture, but book deliveries are handled separately. (Materials such as chalk, paper, and pencils are purchased at the school level.)

Distribution lists for basic education books are given to the Supplies Unit by the DBE. The schools are located by district and grouped together for routing purposes. The DBE pays a Fuel and Daily Subsistence Allowance for the Supplies Unit personnel (a driver and a delivery clerk) making deliveries. During the GBA team's visit, the Supplies Unit Manager mentioned that DBE is usually late in submitting

the distribution list and providing fuel for the delivery trucks; the list arrives from DBE approximately three weeks after the consignment arrives at the warehouse, instead of before or with the shipment.

Supplies Unit personnel have limited GPS coordinates or information about ease of access to the schools. The “last mile” of delivery (i.e., the final step of the process) relies on the driver or clerk’s memory. If they are unable to reach a school due to bad roads, they either leave the textbooks at the nearest school and notify the unreachable school’s Head Teacher, or return the textbooks to the warehouse for later delivery. Information on access to the school is not passed back to DBE or DEMIS.

The Supplies Unit uses six small open trucks to deliver books. Truck maintenance and repair do not occur regularly, due to a lack of allocated funding, and since the trucks are open, books are subject to damage en route by rain, wind, and dust. The driver and delivery clerk in each truck have phones and are supposed to phone the Head Teacher prior to making a delivery, but Head Teachers indicated that this rarely happens; it is unusual to get forewarning of a delivery. If the Head Teacher is not at the school to receive the delivery, the trucks return to the warehouse; they will either make a second delivery or deliver the books to a nearby school, as instructed by the Head Teacher.

The Supplies Unit is the custodian of the delivery notes. Neither the DBE nor DEMIS receive feedback, and no evaluation is made regarding distributions. The manager of the Supplies Unit keeps paper delivery records, but they are of little use in collecting data other than checking on a particular delivery to a particular school. The Supplies Unit delivers only what it has received. For books published and distributed through the MoEST, there is no system for providing feedback on shortages or overages in book deliveries, nor any process for book redistribution. Auditors from the National Audit Office are supposed to visit schools to check that textbooks were delivered, but in practice such checks rarely happen due to the shortage of staff.

When the GBA team visited the Supplies Unit warehouse in Lilongwe on November 19, 2019, the warehouse was empty and had not received books since March 2018. The Supplies Unit Manager emphasized that the unit is responsible for delivering only the book packages according to the list supplied by DBE. The Supplies Unit does not check the quantities of the consignments, nor is the Unit responsible for over- or under-deliveries.

Private Distributors

Malawi has private distributors with the capacity to deliver large quantities of books from printers to schools.

Bolloré Logistics is a French international corporation with interests in rail, logistics, freight forwarding, warehousing, and distribution. It is the biggest port operator in Africa, bringing goods to landlocked Malawi from Beira, Nacala, Durban, and Dar es Salaam. With Burda International, Bolloré carried out the distribution of essential reading materials for MERIT and KfW Development Bank. For MERIT in 2018, Bolloré distributed 2 million books to 6,000 schools over a two-month period.

For Bolloré deliveries, each truck has one contracted driver and one Bolloré delivery clerk to offload and monitor the books on delivery. Bolloré has warehouses in Blantyre and Lilongwe. Books are packed by the printer in boxes of 50 books per subject. Prior to delivery, Head Teachers are called and informed that a delivery is imminent. Upon delivery, the Head Teacher counts the books and signs the delivery note, which is then scanned in the field and sent to the head office; the original is delivered to the printer. For safety reasons, drivers may park the trucks at schools, near police stations, or in villages overnight. Drivers submit a logbook of the distance covered and the time taken to drive between the schools.

Allied Freight provides delivery services to the GoM, NGOs, donors IPs, and publishers. During an interview with the GBA team, the Allied Freight directors said that working with the MoEST is particularly challenging as the data the Ministry supplies are often inaccurate. Drivers are not given GPS coordinates for the schools, and they frequently receive incorrect information (e.g., sometimes private and public schools are mixed up; sometimes drivers are told to deliver books for grades 1–8 to a school that has only grades 1–3, and vice versa). There are new schools that are not registered and old schools that have moved. To mitigate some of these challenges, Allied Freight created its own database of contact numbers for Head Teachers.

Allied Freight personnel indicated that even though the GoM payment terms are stipulated in the contract, payment is made late. Both local and overseas printers also do not pay promptly. However, when the company worked for DFID and USAID directly, there were no issues regarding payment.

Both companies insure their loads and vehicles with locally based AXA Insurance. The Supplies Unit does not insure loads, although options for doing so could be considered going forward.

Receiving and Checking

Upon arrival of a delivery of books, the Head Teacher is responsible for officially receiving the consignment, which theoretically includes checking quantities, stamping the books, and entering the quantities onto an audit card. The Head Teacher should also randomly test the packages to make sure that the books are not damaged or misprinted.⁵⁰ In theory, when Head Teachers report shortages or damaged books, the printer is asked to replace them.

In reality, however, time is generally not allowed for these processes to be completed. Despite having mobile phones, delivery clerks give little notice to the schools that a delivery is forthcoming, often arriving unannounced and eager to offload the books as quickly as possible to resume their schedule. The Head Teacher is under pressure to sign for whatever arrives without physically checking all the contents for either quantity or quality. Having designees from the School Management Committee or

⁵⁰ For materials printed by the MoEST, the Ministry conducts pre-delivery checks at the printer's prior to this stage.

Parent Teacher Association participate in receiving books would increase accountability in the process and also allow the checking and verification of the delivery to happen more quickly and thoroughly.

Ideally, there should be enough time for the personnel receiving the books to accurately check them; however, in practical terms, this would mean that deliveries would either take longer or, if the same timeframe is kept, would cost more because more trucks and drivers were being used. GBA therefore recommends that contracting be structured to incentivize timely, complete delivery in a ‘best value’ type of model, as opposed to incentivizing only the lowest price and/or the fastest delivery.

Seasonal and Other Distribution Planning Challenges

In 2018, the National Statistics Office estimated that about 31% of the schools in Malawi are not accessible during the rainy season.

Any new or significantly updated materials should be made available for teacher training and orientation before the school year starts in mid-September—ideally, as early as June. Planning for book distribution should take into account whether the materials are needed for the start of the school year (i.e., by the end of August) or earlier for training, and then work backward from these dates to determine when the previous steps in the chain need to be completed in order to build in adequate time.

GBA Findings: Distribution Management Strengths

- Malawi has a healthy private distribution industry. Providers have both modern equipment and experience working as subcontractors for printing houses and directly for GoM ministries.
- The private distribution systems have the capacity to deliver both small and large quantities of books to schools in a timely manner and could support increased distribution of essential reading materials.

GBA Findings: Distribution Management Weaknesses

- The MoEST lacks both comprehensive and widely available GIS mapping of school locations and systematized information on school accessibility via road.
- The MoEST Supplies Unit is severely dilapidated and has rarely been used in recent years. The unit has no materials or facilities to open and repack consignments, meaning that there is no way to check the stock. Vehicles were in a serious state of disrepair at the time of the GBA team’s visit, and there was no schedule for overhaul nor funds available for this.
- Delivery schedules often do not allow books to arrive in time for required teacher training before the start of the school year, nor do delivery schedules allow the Head Teachers receiving books time to check the order and verify the contents.

- There is no feedback loop to report missing or incorrect deliveries, nor is there a redistribution system to adjust for these errors.
- There is currently no digital tracking of TLM distribution.

GBA Recommendations: Distribution Management

GBA recommends the following:

- The Book Sector Development Plan should include a cost benefit analysis of options for book distribution, including transferring book distribution to the private sector, modernizing the MoEST Supplies Unit to effectively carry out book distribution, hybrid models incorporating both the public and private sectors, and an analysis of distribution point options (e.g., deliveries to each school, or to the zonal MoEST office and then pick-up by school personnel).
- Donors should support the MoEST in incorporating track and trace, using appropriate technologies, into book distribution processes.
- Donors should support the MoEST in expanding and regularly updating GIS mapping of schools, building on the work done under the USAID-funded Malawi Early Grade Reading Improvement (MERIT) project.
- School accessibility by road for book distribution should be rated and monitored annually as part of the school census, and private distributors should be required to report information about school location and access as part of their delivery contracts.
- Contracts for book delivery should be structured to incentivize timely, complete delivery in a 'best value' type of model, as opposed to incentivizing only the lowest price and/or the fastest delivery.
- To strengthen accountability and thoroughness in book distribution members of the community and school-level organizations, such as School Management Committees and Parent Teacher Associations, should be trained to assist Head Teachers in the process of receiving and checking books.
- A standard set of quality-improvement practices should be incorporated into book distribution including:
 - » An after-action review after each round of deliveries, to inform planning for deliveries in the subsequent year.
 - » Revised scheduling to improve the availability of essential reading materials and textbooks at the start of the school year and delivery during the dry season.
 - » Adjusted schedules when teaching and learning materials (TLMs) are new or significantly updated, so that they are available for teacher training and orientation prior to the start of the school year.

- » Production and delivery schedules that allow time for school personnel receiving the books to check them as well as report information on shortfalls or overages.
- » Notification of school personnel in advance of a delivery by drivers or clerks, letting them know when to expect the delivery to arrive.
- » A formal redistribution process to address shortfalls and overages, starting initially at the local level to facilitate an exchange of materials between schools.

SCA Phase VI: Active Use

Active use refers to the effective use of books by learners, their teachers, and children’s family members and caregivers. Children’s development of reading skills hinges on the effective use of books in classrooms and homes, and is directly affected by an adequate provision of essential and supplemental reading materials.

Factors that impact book use, both inside and outside of school, are therefore essential considerations in analyzing the book chain. Evidence has shown that teachers and families often lack knowledge of the importance of regular, sustained reading practice and how to support it effectively. Further, unstable book supplies and penalties for book damage can lead teachers to restrict children’s access to books, and delays in distribution mean that teacher training occurs without any of the materials teachers will use in the classroom.

Use of Essential Reading Materials

Many teachers in Malawi lack training in the role of essential reading materials in the development of reading skills or the instructive use of essential reading materials for practice. Pre-service teacher training does not have a reading certification or a predominant focus on providing formal reading instruction. Materials may be distributed and in the classroom, but the existing curriculum as well as long-standing teacher training and orientation plans, guides, techniques, habits, knowledge, attitudes, and practices may all limit the appropriate use of primary-grade reading instruction materials.

Donors have been crucial in working with the MoEST to address these issues, via work such as USAID’s MERIT. MERIT trains primary school teachers nationwide in effective reading instruction and use of TLMs. MERIT also strives to strengthen student reading outcomes by implementing activities with parents, family members, and the community, whose role in supporting children’s reading acquisition is key. Many parents are not aware of the importance of reading at home and of the many ways in which they and others can support their children’s reading acquisition, even if they are not literate themselves and/or lack reading materials in the home.

Increased awareness and related actions will not only support children’s reading outcomes but will also, over the long term, help to create local demand and markets for essential readers. Investment in this community-driven approach, through trainings, awareness raising, and SBCC campaigns via billboards,

radio, TV, and social media, can help strengthen the entire book supply chain. These actions can create demand for books and their use, improve the care and maintenance of books, and increase investment in books and supplementary materials by parents and caregivers.

PTAs, Mothers Groups, and SMC members can be key actors in supporting their own children's literacy. They can also provide guidance to other parents and caregivers on how to support their children's reading acquisition and can develop and promote activities that support reading in the home and community. Donor activities such as MERIT address this, and donor and MoEST coordination going forward should encourage continued expansion of this work and gradual transition to the MoEST.

Through research, interviews, and school visits, the GBA team found that both the scarcity of books and the uncertainty of their supply and delivery further limit their use. In one school the team visited, the supplementary reading materials were still in their delivery packaging in the Head Teacher's office. The DFID Education Manager stated that she has observed firsthand the shortage of books; potentially available books were often locked inside the Head Teacher's office, and the school heads reported that they did not trust the MoEST to deliver books to their schools in the subsequent year. She noted that parents would be willing to contribute to the procurement of books if the quality were guaranteed and if the books were delivered on a yearly basis and on time, which indicates that parents value the role of books.

During an interview, a Norwegian Agency for Development Cooperation team member told the GBA team that during a recent field visit, she discovered that books are often not used, despite being available at the schools. Books were locked inside separate rooms to preserve them, and teachers were afraid that they would not be issued new books once the current stock was depleted. In some schools she visited, there were no books at all.

This scarcity of essential reading materials means in many cases that students who have textbooks take these home with them every day, either because there are no other reading materials or because the scarce other reading materials are protected from everyday use. Reading at home and with parents and caregivers is an essential factor in successful reading acquisition and must be prioritized. Essential readers are most effective for reading at home activities, making their full availability and use of critical importance.

The practice of taking textbooks home is less effective than reading at home with essential reading materials and increases wear and tear on textbooks and may shorten their lifespan. However, in reality, in many cases textbooks may be the only books children currently have access to for reading at home.

The overall goal must be to provide resources such that children have broad access and freedom to take textbooks and essential reading materials home with them for use outside of schools. *If and only if* children have sufficient essential reading materials, having them take home only these books and not textbooks (such as is being considered currently in Malawi), could potentially be considered a temporary, *short term measure* to preserve textbooks. However, children's access to appropriate

reading materials of all types must not be limited as a matter of policy or of practice. Actors working to implement recommendations from this study will likely wish to examine how all children could have access to all essential reading materials, both in schools and in their homes.

Book Maintenance

Books in Malawian schools are often in poor condition. Poor school infrastructure, including open classrooms and inadequate book storage, and the regular daily shuffle of a primary school child bringing books to and from school all take their toll.

The GBA team noted that from the moment books left the printers until and including when they were in the children's hands, the books had no clear owner. Lack of ownership can lead to lack of care, and lower levels of book maintenance contribute to shorter book life. However, if teachers and students are understood to be the custodians of the books they are using during the school year, are entrusted with using them and taking care of them, and are given guidance on how to do so, the use and lifespan of textbooks and essential readers could be improved. This can be done via positive information sharing campaigns and messaging, both nationally and at the community level, that encourage care and use of books.

GBA Findings: Active Use Strengths

- The members of existing groups in Malawi primary schools (e.g., PTAs, SMCs, Mothers Groups) are well-positioned to take on an important role in helping to ensure that books are received, distributed, cared for, and used in school and at home.
- School personnel and parents already value and safeguard books, thus providing a strong foundation for encouraging their active use and care.

GBA Findings: Active Use Weaknesses

- The current curriculum should be updated to effectively incorporate the use of essential reading materials.
- Teachers lack training on the effective use of essential reading materials and how to encourage parents to carry out activities with their children to support literacy.
- Parents and family members lack the essential reading materials to support their children's reading development, as well as guidance on how to support children's literacy (through storytelling, singing, word games, rhymes, etc.).
- Teachers and students lack the essential reading materials required for reading acquisition.

- The resultant practice of children taking textbooks home exacerbates wear and tear and replenishment needs, and this should be taken into account for textbook planning purposes until there is an adequate supply of the essential reading materials that learners can take home daily for practice.
- Both the lack of books and the uncertain supply limits their use, since their scarcity leads school personnel to store them away instead of using them.
- The lack of designated custodians for books lessens users' accountability and their inclination to take care of the books.

GBA Recommendations: Active Use

GBA recommends the following:

- The donor community should support the MoEST in revising the curriculum to incorporate evidence-based best practice regarding the use of essential reading materials into literacy instruction, adjusting instructional planning and timetables to incorporate essential reading materials into the school day, and ensuring that the development of these materials is informed by and aligned to this curriculum.
- The donor community should continue to support the MoEST in training teachers in the importance of essential reading materials and how to use them effectively in the classroom and in incorporating this into training programs, along with pedagogical coaching and mentoring for teachers.
- The Book Sector Development Plan should include the steps, budget, and timeframe for ensuring that schools receive sufficient essential reading materials and that these are available for children to take home each day.
- Parent Teacher Association (PTA) members should be trained in the importance and role of essential reading materials and how to support their use in the home and community.
- As part of the Book Sector Development Plan, the MoEST should designate teachers and students as the custodians of the books they use during a year and provide guidance to them and to school level organizations like PTAs, Mothers Groups (MGs), and School Management Committees (SMCs) to encourage use and care of books every day. This may include training as well as the development and implementation of informational and SBCC campaigns, both nationally and at the community level, to promote reading at school, at home, and in the community.

CONCLUSION

The challenges for the development of a functioning book supply chain in Malawi are daunting but not insurmountable. Each of the six phases in the chain presents significant obstacles, but the GBA team has provided concrete recommendations for addressing each one.

However, a number of high-level challenges must first be addressed for the improvements within each phase to have their full impact—most significantly, the absence of essential reading materials within the book supply chain, which is focused almost exclusively on textbooks. Means for solving this issue are further complicated by the lack of trust between donors and the GoM since the Cashgate corruption case and the resultant parallel and fragmented nature of education sector support. These big-picture challenges were not created in a day or a month, nor will they be solved in that timeframe, but they *can* be addressed and resolved. In this report, the GBA team has laid out suggested steps for doing so.

This process will require continued and significant donor engagement, both technical and financial, with the GoM. One key step requires coordination among the stakeholders—the donor community, the MoEST, printers and publishers, and school and civil society representatives—in developing a comprehensive Malawi Book Sector Development Plan. The Plan will address the topline issues described in this report, as well as the recommendations for each phase of the book supply chain. The Plan will provide a 20-year blueprint of how to achieve the goal of engaging the public and private sectors in building a sustainable supply of books for primary school learners, ultimately funded by the GoM with an eventual exit strategy for donors.

The Book Sector Development Plan will include an analysis of different models of public and private sector roles to address gaps in the book supply chain and of the capacity-building needs associated with each model. The donor community and the MoEST will then work in tandem to address the capacity-building requirements of book development stakeholders indicated by the Plan.

The development and sustained implementation of a comprehensive plan to address the numerous breaks in the supply chain in the short, medium, and longer term will make it possible to address the immediate need to place essential readers into children’s hands. Over time, such a plan will increase capacity for the development and publishing of these materials in both the private and public sectors, increase understanding of their role and importance, and increase demand for them. This will eventually ensure that primary school children in Malawi, their teachers, and their parents and caregivers have access to and use the books needed for children’s successful reading acquisition and will create, over time, a functioning market for essential readers.

ANNEX 1: GBA RECOMMENDATIONS BY TIMEFRAME

Immediate

GBA recommends the following:

- The MoEST, donors and book sector stakeholders should prioritize systematic collection and use of book data, on textbooks as well as essential readers, to inform plans and actions, since existing data is limited and incomplete and does not provide a sound basis for planning to meet the book needs of primary school learners.
- The donor community should prioritize supporting the MoEST to expand its planning and forecasting processes to include sufficient numbers of high-quality essential reading materials as well as textbooks.
- The MoEST and donors, through the JBDWG, should assess the ongoing transition to digitalized data collection for opportunities for further expansion, such as via the work of the USAID YESA Project. GBA recommends including data on book types and stocks, integration with enrollment data, and, with additional training, potentially data collection at the school level via feature or smart phones. Periodic verification of books stocks via options such as apps, SMS, calls, WhatsApp, and photos can be valuable given personnel and resource constraints, as well as weather and road conditions, which limit opportunities for physical verification.
- Donors should provide specialized technical assistance to support an analysis of costs and benefits of local versus international printing, including the impact of the tax on imported paper on the local printing sector and potential options for a revised tax structure.
- Donors should support the MoEST in expanding and regularly updating GIS mapping of schools, building on the work done under the USAID-funded Malawi Early Grade Reading Improvement (MERIT) project.
- School accessibility by road for book distribution should be rated and monitored annually as part of the school census, and private distributors should be required to report information about school location and access as part of their delivery contracts.
- Contracts for book delivery should be structured to incentivize timely, complete delivery in a 'best value' type of model, as opposed to incentivizing only the lowest price and/or the fastest delivery.

- To strengthen accountability and thoroughness in book distribution members of the community and school-level organizations, such as School Management Committees and Parent Teacher Associations, should be trained to assist Head Teachers in the process of receiving and checking books.
- A standard set of quality-improvement practices should be incorporated into book distribution including:
 - » An after-action review after each round of deliveries, to inform planning for deliveries in the subsequent year.
 - » Revised scheduling to improve the availability of essential reading materials and textbooks at the start of the school year and delivery during the dry season.
 - » Adjusted schedules when teaching and learning materials (TLMs) are new or significantly updated, so that they are available for teacher training and orientation prior to the start of the school year.
 - » Production and delivery schedules that allow time for school personnel receiving the books to check them as well as report information on shortfalls or overages.
 - » Notification of school personnel in advance of a delivery by drivers or clerks, letting them know when to expect the delivery to arrive.
 - » A formal redistribution process to address shortfalls and overages, starting initially at the local level to facilitate an exchange of materials between schools.
- The donor community should continue to support the MoEST in training teachers in the importance of essential reading materials and how to use them effectively in the classroom and in incorporating this into training programs, along with pedagogical coaching and mentoring for teachers.
- Parent Teacher Association (PTA) members should be trained in the importance and role of essential reading materials and how to support their use in the home and community.

Medium Term

- The MoEST, education sector donors, and book sector stakeholders (including printers, publishers, school-level actors, and civil society) should develop a long-term Book Sector Development Plan⁵¹ or similar sector planning document. The plan may be developed through the establishment of a Joint Book Development Working Group⁵² or a related coordination

51 See Annex 2 for an illustrative outline of the Book Sector Development Plan.

52 Throughout this report, the terms *Book Sector Development Plan* and *Joint Book Development Working Group* are used for ease of reference. The authors understand that operationalization in Malawi may result in different terminology. The roles, functions, and content of the working group and plan are the critical point, not the specific titles used.

structure that builds on existing mechanisms, and should be well-known and understood by publishers and other book sector actors.

- The Joint Book Development Working Group should explore how investment and actions at the national, subnational, local, and community levels can strengthen the entire book supply chain, from opportunities for local publishing and purchasing of essential reading materials to Social and Behavior Change Communication campaigns that support the use and care of books.
- The Book Sector Development Plan should include an analysis of different models of public and private sector roles to address gaps in the book supply chain for all types of books for primary school learners and of the capacity-building needs associated with each model for each stakeholder.
- The MoEST, with donor support, should incorporate into the Book Sector Development Plan an assessment of current and potential book development capacity in both the MIE and Malawi's publishing sector, including a desk review, site visits, and interviews.
- The MoEST, with support of the donor community, should incorporate in the Book Sector Development Plan an assessment of the various title development models in the region, including the costs, benefits, technical capacity-building considerations, timelines, and economic impact of each.
- The Book Sector Development Plan should include a detailed assessment of local publishers' needs related to producing sufficient high quality essential reading materials for primary school grades and related training priorities, plans, and timeframes.
- Per the findings of this assessment, the Book Sector Development Plan should include efforts to increase the role of the private sector, including the local publishing industry, in the development of essential reading materials.
- The MoEST and donors should explore and adapt the experiences of countries that have successfully stimulated the market for the provision of essential reading materials for use in schools and in homes.
- Capacity building plans within the Book Sector Development Plan should include additional support to publishers and printers on the development of materials for children with disabilities.
- Donors and the MoEST should explore investment in community approaches that involve local councils, alumni, parents and small NGOs or projects that could mobilize resources to purchase books for students to use at home. These actors could also champion book procurement and accountability within these processes at the local level, while promoting the local publishing industry.
- The Book Sector Development Plan should include a cost benefit analysis of options for book distribution, including transferring book distribution to the private sector, modernizing the MoEST Supplies Unit to effectively carry out book distribution, hybrid models incorporating both

the public and private sectors, and an analysis of distribution point options (e.g., deliveries to each school, or to the zonal MoEST office and then pick-up by school personnel).

- Donors should support the MoEST in incorporating track and trace, using appropriate technologies, into book distribution processes.
- The donor community should support the MoEST in revising the curriculum to incorporate evidence based best practice regarding the use of essential reading materials into literacy instruction, adjusting instructional planning and timetables to incorporate essential reading materials into the school day, and ensuring that the development of these materials is informed by and aligned to this curriculum.
- As part of the Book Sector Development Plan, the MoEST should designate teachers and students as the custodians of the books they use during a year and provide guidance to them and to school level organizations like PTAs, Mothers Groups (MGs), and School Management Committees (SMCs) to encourage use and care of books every day. This may include training as well as the development and implementation of informational and SBCC campaigns, both nationally and at the community level, to promote reading at school, at home, and in the community.

Longer Term

- The Working Group and the Plan should comprehensively address the topline issues noted here and the recommendations for each phase of the book supply chain highlighted in this report. These issues are complex, inter-related, and systemic, and a piecemeal approach to addressing them will not succeed.
- The Book Sector Development Plan should look forward over the next 20 years and provide a blueprint of how to achieve the goal of engaging the public and private sectors in building a sustainable supply of essential readers and textbooks for primary school learners, ultimately funded by the GoM with an eventual exit strategy for donors.
- The donor community should coordinate and address the capacity-building requirements outlined in the Plan.
- The MoEST, with donor support, should incorporate into the Book Sector Development Plan a non-transferable budget line for essential reading materials within the overall MoEST budget, so that these materials (and not just textbooks) are part of the budget. This will need to be financed initially by donors but should include a commitment and plan for a gradual transition to GoM funding.
- The Book Sector Development Plan should include a costed, phased strategy for building the title development skills needed to create sufficient high-quality essential reading materials for primary students, not only in English and Chichewa but also in local languages, including Tumbuka, Yao, Lomwe, Nyakyusa-Ngonde, Sena, Kokola, and Tonga.

- The GoM and donors should continue work to strengthen the public financial management system in order to rebuild trust and permit predictable donor funding that will allow for cooperative planning and timely GoM payments to vendors.
- Donors should work with the GoM to analyze what steps need to be taken in order to meet requirements for providing direct budget assistance and a plan to gradually achieve them over time, as well as how to accountably provide support in the meantime.
- The Book Sector Development Plan should include a framework that will allow the GoM over time to consistently allocate a set budget percentage for the purchase of essential reading materials.
- The Book Sector Development Plan should include the steps, budget, and timeframe for ensuring that schools receive sufficient essential reading materials and that these are available for children to take home each day.

ANNEX 2: ILLUSTRATIVE OUTLINE FOR THE MALAWI BOOK SECTOR DEVELOPMENT PLAN

- I. Objective of the Malawi Book Sector Development Plan
 - » Initial discussions with Ministries on the Plan
 - » Book Sector Development Plan purpose and scope
- II. Data collection
 - » Data on the numbers and type of books, in what languages, are needed, for all primary learners in Malawi to have access to sufficient essential reading materials
 - » Data on the numbers, types, and languages of books that already exist
 - » Analysis of gaps in the numbers, types, and languages of books
- III. Update of the Supply Chain Analysis
 - » Analysis of capacity in Ministry and MIE to address gaps
 - » Analysis of capacity in publishing industry to address gaps
- IV. External research and discussions
 - » Analysis of various regional hybrid public and private models
 - » Copyright and licensing considerations
- V. Discussion of capacity-building needs, costs, and timeframes related to each model
- VI. Options for stimulating demand and creating a market for essential books
- VII. Analysis of impact of tax on imported paper
- VIII. Cost-benefit analysis of distribution options, including updating the MoEST Supplies Unit, outsourcing, hybrid and combo models, distribution points, and inclusion of Track & Trace in all options
- IX. Financing
 - » Estimate for a non-transferable budget line item for essential books
 - » Proposals for a revised tax structures (per item VII)
 - » Donor support, commitments, and conditionalities

- » GoM support and commitments
 - » Plans and timeframes for transition to GoM financing
- X. Recommendations, including plans, timeframe, and costs for moving forward over the next 5, 10, 15, and 20 years

ANNEX 3: RESEARCH PURPOSE AND RESEARCH QUESTIONS

The purpose of the GBA Book Supply Chain Analysis (SCA) is to ascertain the strengths and weaknesses of the book supply chain in each of the countries visited and both to provide an analysis of the book supply chain in each country analysis and to contribute to global understanding of the challenges that face book supply chains in developing countries. The challenges are not the same in any two countries, but by investigating eight countries that are diverse in size, geography, and culture, the GBA research will shed light on common challenges that can be addressed by the appropriate stakeholders. Malawi is the first country to be chosen for this analysis.

Outcomes from the research in Malawi will be recommendations for the country to strengthen its book supply chains and, at the end of the research, guidelines to enable stakeholders – governments, donors, IPs, UN agencies and NGOs – to investigate any national book supply chain and identify opportunities for improvement. The findings of all SCAs can be used to present options and inform decisions for strategies with quantifiable indicators of achievable outcomes.

Methodology

Using a project framework that had been designed by the research team, with material input from the GBA Steering Committee and USAID, the following research methodology was planned.

The methodology used to gather information in country included consultations and interviews with a full range of stakeholders.⁵³ The stakeholders were classified into nine groups according to their areas of involvement in the supply chain. Prior to travelling to Malawi, the GBA team had prepared a list of 276 questions, organized into 47 categories, each representing a key element of the functions carried out in a book supply chain.⁵⁴ Rather than questionnaires, the team produced Interview Protocols that listed the questions to be asked during interviews for each of the nine groups. The questions were distributed across protocols to ensure that each category of question was posed to at least one person in three of the nine stakeholder groups. Their responses were then compared in order to triangulate information.

The interviews lasted for approximately one hour, and most were attended by two team members, both taking notes. The whole team compared and discussed their notes at the end of every second day. Interviews were flexible and conducted in a manner to encourage probing and further enquiry.

53 Further detail can be found in Annex 4: Research Instruments and Methodology.

54 The question categories and a sample Interview Protocol can be found in Annex 4: Research Instruments and Methodology.

Investigative protocols were developed from the project framework and were used to provide an overview of the supply chain and to indicate points where intervention may improve the function of the system as a whole.

ANNEX 4: RESEARCH INSTRUMENTS AND METHODOLOGY

Information was collected through consultation and interviews with a range of stakeholders, who were classified into nine groups according to their main area of involvement:

1. Ministry of Education, Science and Technology
2. Government Budgeting and Finance
3. National Statistics Office and DEMIS
4. Donors and Implementers
5. Publishers, Retailers, and Wholesalers
6. Printers and Binders
7. Packers and Distributors
8. District Education Manager and Head Teachers
9. Teachers, Parents, and Women's Organizations

Prior to traveling to Malawi, the team prepared a list of 276 questions, both specific and general, covering 47 categories:

- | | | |
|--------------------------------------|---|---|
| 1. Economics Statistics and Politics | 12. Income Sources for Publishers | 21. Obtain, Adapt, and Translate Foreign Titles |
| 2. Infrastructure | 13. Government Expenditure on Books | 22. Piracy Assessment |
| 3. Connectivity | 14. Plan Cash Flow | 23. Import Foreign-Published Books Directly |
| 4. Government Policies and Practice | 15. Give Each Title a Progress Timeline | 24. Government Procurement Policy |
| 5. Financing Books | 16. Write Manuscript and Draw Illustrations | 25. Procurement Methods |
| 6. Languages for Reading and Writing | 17. Survey of Reading Materials | 26. Writing Procurement Documents |
| 7. Teachers | 18. Market Map | 27. Book Selection |
| 8. Reading Assessment | 19. Investigate Local Digital Publishing | 28. Use Contract as Set Out in the Procurement Document |
| 9. Estimating Demand | 20. Publishing Human Resources | 29. Editing |

- | | | |
|---------------------------------------|---|---------------------------------------|
| 30. Designing and Illustrating | 36. Insurance | 42. Receiving and Checking |
| 31. Copyright | 37. Customs Clearances | 43. Sorting, Maintenance, and Storage |
| 32. Proofing and Piloting | 38. Warehousing | 44. Replenishment |
| 33. Preparing Camera-Ready Copy Files | 39. Logistics | 45. Classroom Distribution |
| 34. Printing | 40. Tracking Consignments | 46. Use in Classrooms |
| 35. Packing and Labeling | 41. Delivery to Book and Stationary Shops, Stores, and Market Outlets | 47. Home Use of Books |

Protocols

Six protocols were used for the research in Malawi:

1. Interview Protocol 2 for Donors and Implementers
2. Interview Protocol 4 for Publishers
3. Interview Protocol 5 for Retailers and Wholesalers
4. Interview Protocol 6 for Printers, Binders, Packers, and Distributors
5. Interview Protocol 10 for National Statistics Office and Internet Research
6. Interview Protocol for MIE

All are available, but for reasons of space only one sample is provided here: Interview Protocol 10 for National Statistics Office and Internet Research.

INTERVIEW PROTOCOL 10 FOR NATIONAL STATISTICS OFFICE AND INTERNET RESEARCH

GENERAL INTRODUCTION

1. Ask for permission to record
2. Ask whether the report can use the interviewee's name or identifiable job designation
3. Briefly introduce GBA and the SCA, including purpose and methodology and how the information will be used
4. State that the outcomes needed are:
 - » What happens in theory?
 - » What happens in fact?
 - » What are the things that are working well?

- » What are the bottlenecks?
 - » What is the timeline for these links?
5. Show and explain as necessary the supply chain, major link by major link
 6. Demonstrate the stakeholder's part in the supply chain

SPECIFIC QUESTIONS

Economics Statistics and Politics

- » What is the latest population figure?
- » What percentage of the population are 0–9 years old?
- » What is the rate of economic growth?
- » What is the average household income?
- » What is its purchasing power?

Write Manuscript and Draw Illustrations

- » What local languages are commonly used and by what percentage of the children?

Infrastructure

- » How many lake ports handle freight?
- » How many airports handle international and local freight?

Connectivity

- » What proportion of the population can access the internet on a daily/weekly basis in their home/school or a community center?
- » What percentage of primary schools have internet connections that are functional daily? (Internet connections/access includes internet that is strong/fast enough to be used for accessing books/basic digital learning content.)
- » What proportion of the population has access to an operational mobile phone on a daily/weekly basis, including airtime?
- » What is the level of coverage by cellular networks?

Logistics

- » What are the reported challenges with distribution that are associated with certain areas?
- » Is there a post code system?

Languages for Reading and Writing

- » Is there a map of language use within the country?
- » What languages are in regular use by those residing in the country? What is the population and geographic distribution of users of each language?

Teachers

- » What are teacher salary levels?

ANNEX 5: MALAWI READING AND BOOK PROJECTS

Over the past 10 years, the GoM has implemented reforms to improve the educational outcomes of primary school learners using the MoEST National Education Sector Plan 2008–2017, including the launch of the National Reading Program (NRP) initiative in 2016. NRP is a nationwide program to support early reading and to strengthen existing assessment mechanisms to track reading performance, using EGRA. Unfortunately, several recent assessments continue to show underperformance by learners in Malawi.

Various major book supply initiatives have been instituted since 2015:⁵⁵

- Malawi Education Sector Improvement Project, August 2016 to December 2020
- National Reading Program, September 2016 to December 2020
- Early Grade Reading Assessment (EGRA), USAID with the Department of Inspection and Advisory Services, January 2013 to December 2016
- Malawi Early Grade Reading Improvement Activity (MERIT), USAID, September 2015 to September 2020
- CAMFED Malawi, Campaign for Female Education, DFID, 2009
- UNICEF support to Early Child Development
- Textbooks and Teachers Guides Procurement for all standards, KfW Development Bank. Supply and Distribution of Primary School Textbooks and Teacher Guides for Standards 1–8, KfW Development Bank, 2016–2017
- Support for teacher education, development, and training; nutrition; and girls’ education; DFID, Japan International Cooperation Agency, and GIZ (German Society for International Cooperation); National Education Sector Plan 2018–2022
- GIZ: Teacher Management, Nutrition, and Access to Primary Education, 2014–2018
- Norway: Teacher Education, Unlocking Talent (Numeracy and Literacy Project Using Tablets), 2014–2020

55 A comprehensive list of programs funded by USAID from June 2012 to September 2017 can be found on the organization’s website (<https://2012-2017.usaid.gov/malawi/fact-sheets/education-program-overview>).

ANNEX 6: LIST OF PERSONS INTERVIEWED

TABLE 5. Persons interviewed for this report, in chronological order

WEEK ONE						
	ORGANIZATION	INDIVIDUAL	DATE	TIME	LOCATION	GBA ATTENDEES
1	USAID Malawi office	USAID Mission Director Littleton Tazewell, Christine Veverka, Amy Scott, Ramsey Sosola, Ida Mataya	Nov. 18	10 a.m.	Lilongwe	Simon James (SJ), Julian Watson (JW), Brooke Estes (BE), Dorah Nyirenda (DN)
2	MoEST Secretary for Education, Science and Technology (SEST)	Justin Saidi and team	Nov. 18	2 p.m.	Lilongwe	SJ, JW, BE, DN
3	MIE Introduction to the National Steering Committee	SEST, MIE Director, MoEST Directors, Christine Veverka, USAID	Nov. 19	2 p.m.	Zomba	SJ, BE
4	KfW Development Bank	Lamulo Nsanja	Nov. 19	4:30 p.m.	Lilongwe	JW, Roel de Haas (RdH)
5	MIE Curriculum Development Languages Section	Foster Gama	Nov. 19	3:30 p.m.	Zomba	SJ, BE
6	Manager, MoEST Supplies Unit	Alex Banda	Nov. 19	11 a.m.	Lilongwe	JW, DN, RdH
7	DFID	Sabina Morley	Nov. 19	3 p.m.	Lilongwe	JW, DN, RdH
8	MIE Directors Meeting	Fritz Kadyoma	Nov. 20	8 a.m.	Zomba	SJ, BE
9	MIE Education Materials Resource Centre	Max Iphani	Nov. 20	9 a.m.	Zomba	SJ, BE
10	MIE Librarian	Gibson Dzimbiri	Nov. 20	10 a.m.	Zomba	SJ, BE
11	Blantyre Teachers Training College	Gertrude Zimba Jumbe	Nov. 20	2 p.m.	Blantyre	SJ, BE

WEEK ONE						
	ORGANIZATION	INDIVIDUAL	DATE	TIME	LOCATION	GBA ATTENDEES
12	Print Care	Manish	Nov. 20	9:30 a.m.	Lilongwe	RdH, JW, DN
13	Design Printers	Praveen	Nov. 20	10:30 a.m.	Lilongwe	RdH, JW, DN
14	Capital Printing Press	Nayan	Nov. 20	11:30 a.m.	Lilongwe	RdH, JW, DN
15	Kriss Offset	Shabir Gani	Nov. 21	8:30 a.m.	Blantyre	RdH, SJ, BE
16	Fattani Printers	Ahmed	Nov. 21	10 a.m.	Blantyre	RdH, SJ, BE
17	Claim Publishers	John Yohane	Nov. 21	11 a.m.	Blantyre	JW, RdH, SJ, BE, DN
18	BPAM (Malawi Book Publishers Association) President	Maureen Masamba	Nov. 21	1 p.m.	Blantyre	JW, RdH, SJ, BE, DN
19	Bolloré Logistics Malawi	Phillipe Niameky	Nov. 21	3 p.m.	Blantyre	JW, RdH, SJ, BE, DN
20	District Education Manager, Blantyre City	Anita Kaliu	Nov. 22	8:30 a.m.	Blantyre	JW, RdH, SJ, BE, DN
21	Jhango Publishers	James Ng'ombe	Nov. 22	10 a.m.	Blantyre	JW, RdH, SJ, BE, DN
22	Bookmate Publishers	Samuel Kalea	Nov. 22	11 a.m.	Blantyre	JW
23	Malawi Writers Union	Mike Mvona	Nov. 22	1:30 p.m.	Blantyre	JW, DN
24	Bookland Publishers	Hastings Matewere	Nov. 22	3 p.m.	Blantyre	JW, DN
25	Montfort Special Needs Education College	Paul Sitima	Nov. 22	10 a.m.	Blantyre	SJ
26	Audiologist at Montfort Audiology Clinic	Ellen Hedman	Nov. 22	10:30 a.m.	Blantyre	SJ

WEEK TWO						
	ORGANIZATION	INDIVIDUAL	DATE	TIME	LOCATION	GBA ATTENDEES
1	Norwegian Embassy	Elin Ruud	Nov. 25	8 a.m.	Lilongwe	BE, DN, RdH
2	USAID Office Director, Sustainable Economic Growth	Cullen Hughes	Nov. 25	9:15 a.m.	Lilongwe	RdH, BE
3	MoEST DBE	Gossam Mafuta	Nov. 25	9:30 a.m.	Lilongwe	JW, DN
4	Copyright Society of Malawi	Dora Salamba	Nov. 25	10 a.m.	Lilongwe	JW/RdH
5	Civil Society Education Coalition	Kisa Kumwenda	Nov. 25	2 p.m.	Lilongwe	JW/RdH
6	DAI	Chikondi Maleta	Nov. 26	8:30 a.m.	Lilongwe	JW, DN, RdH
7	Reading for All Malawi (REFAM)	Heidi Soule	Nov. 26	10 a.m.	Lilongwe	JW, DN
8	RTI	Barbra Greenwood	Nov. 26	2 p.m.	Lilongwe	JW, RdH
9	MoEST Deputy Director of Planning	James Namfuko	Nov. 27	8 a.m.	Lilongwe	JW, DN, RdH
10	MoEST Chief Statistician	Maclead Mwale	Nov. 27	8 a.m.	Lilongwe	JW, DN, RdH
11	Librarian, National Library	Gray Nyali	Nov. 27	10 a.m.	Lilongwe	JW, DN, RdH
12	UNESCO	Julio Magomero	Nov. 27	11 a.m.	Lilongwe	JW, DN, RdH
13	Allied Freight	Ackim Mwale	Nov. 27	2 p.m.	Lilongwe	JW, DN, RdH
14	MoEST Director of Procurement	Edward Jeke	Nov. 28	8 a.m.	Lilongwe	JW, DN, RdH
15	MoEST Deputy Director of Inclusive Education	Noel Mwango	Nov. 28	10 a.m.	Lilongwe	JW, DN, RdH
16	UNICEF	Kimanzi Muthengi	Nov. 28	7:30 a.m.	Lilongwe	JW, DN, RdH

WEEK TWO						
	ORGANIZATION	INDIVIDUAL	DATE	TIME	LOCATION	GBA ATTENDEES
17	MoEST Director of Inspectorate and Advisory Services	Raphael Agabu	Nov. 25	8:30 a.m.	Lilongwe	JW, DN, RdH
18	UNESCO	David Mulera	Nov. 27	11 a.m.	Lilongwe	JW, DN, RdH
19	Chivala Primary School	Head Teacher	Nov. 29	10 a.m.	Dowa	JW, DN, RdH
20	District Education Manager, Dowa	Alex Manyengo	Nov. 29	10 a.m.	Dowa	JW, DN, RdH
21	MIE Material Development	Peter Ngunga	Dec. 2	9:30 a.m.	Zomba	JW, DN
22	MIE Executive Director	Fritz Kadyoma	Dec. 2	10:15 a.m.	Zomba	JW, DN
23	MIE Material Development	Max Iphani	Dec. 2	11 a.m.	Zomba	JW, DN
24	MIE Curriculum Specialist	Edward Mtonga	Dec. 2	11:30 a.m.	Zomba	JW, DN
25	Maneno Bookshop	Gaulphine Nyirenda	Dec. 2	10 a.m.	Lilongwe	RdH
26	Greymatter Books	Christopher Ndolo	Dec. 2	11 a.m.	Lilongwe	RdH
27	REFAM	Heidi Soule	Dec. 2	2 p.m.	Lilongwe	RdH
28	Logos Open Culture	Muti Michael Etter-Phoya	Dec. 3	8:30 a.m.	Lilongwe	JW, DN, RdH
29	USAID Malawi office	Education Team Outbrief	Dec. 3	10:30 a.m.	Lilongwe	JW, DN, RdH
30	Independent Schools Association of Malawi	Mlongoti/ Joseph Patel	Dec. 3	1:30 p.m.	Lilongwe	JW, DN, RdH
31	USAID Malawi office	Outbrief USAID Mission Director Littleton Tazewell and team	Dec. 3	4 p.m.	Lilongwe	JW, DN, RdH
32	ABT Associates	Stella Kachiwanda	Dec. 4	8:30 a.m.	Lilongwe	JW, DN, RdH

TABLE 6. Sources by book supply chain phase.

Planning and Forecasting		
Representatives of MoEST departments responsible for planning and forecasting activities, including DBE, District Education Managers, DEP, Department of Inspection and Advisory Services, and DEMIS		
Title Development		
Authors and illustrators	Global Digital Library	Malawi Book Publishers Association
Copyright Society of Malawi	IPs (MERIT, REFAM)	MIE
USAID, Norwegian Agency for Development Cooperation,	International publishers	Malawi Writers Union
KfW Development Bank, DFID, UNESCO, UNICEF	Local publishers	MoEST DEP
		MoEST SPU
Publishing and Printing		
Bookland Publishers	Fattani Printers	MERIT
Bookmate Publishers	Greymatter Books	Malawi Writers' Union
Capital Printing Press	Jhango Publishers	Maneno Bookshop
Claim Publishers	Kriss Offset	REFAM
Design Printers		
Purchasing		
DFID	MoEST	Norwegian Agency for Development Cooperation
KfW Development Bank	Ministry of Finance, Economic Planning, and Development	USAID
Distribution Management		
Head Teachers	MoEST DEP	MoEST Supplies Unit
MoEST DBE	MoEST DEMIS	

Active Use		
USAID, DFID, Norwegian Agency for Development Cooperation, KfW Development Bank	Head Teachers	District Education Office Personnel, Blantyre City
Distributors	Teachers, PTA, and Mothers Group members, Chivala Primary School	School Inspectors
		Teachers

ANNEX 7: PARTNERSHIP OPPORTUNITIES

To support the recommendations made in this Malawi Book Supply Chain Assessment and to better understand where gaps and opportunities within the supply chain could be addressed, the GBA undertook a Partnerships Assessment in Malawi in February 2020. While the results of this assessment are still being analyzed, key points are provided below to highlight how recommendations could be supported through partnerships and collaboration.

The Partnerships Assessment aimed to understand the partnership environment in Malawi, investigate current and previous partnerships, and learn from more than 40 organizations and practitioners about opportunities and challenges in country. Key findings included:

- A strong collaborative spirit across donors and implementers, given the significant role that International Aid plays in the Malawian economy
- An openness to the involvement and suggestions of other actors by the GoM, although this is too often dependent on the ministry department involved
- A limited private sector, stymied by government restrictions, a lack of incentives to engage, and an underdeveloped market
- A significant need for systems-strengthening across local governance to ensure that programs can be implemented at scale, efficiently, and with accountability
- Innovative programming by governments, foundations, and individuals to expand entrepreneurship within the country through grants, capacity-building, and mentoring
- Limited reading or book culture within the country—in some cases, almost a fear of books—exacerbated by a lack of book policy or strategy at the government level

Partnership opportunities exist at different levels of investment and scale within Malawi for both the GBA and other education initiatives:

1. System strengthening partnerships championed by Development Partners using development diplomacy and innovation funding. This could look to build on the work of:
 - » UNDP's Millennium Innovation Challenge Fund that supports sectoral growth and capacity-building for the actors within the Book Value Chain
 - » The Local Government Accountability and Performance project through USAID and DFID to ensure greater capacity at the district and local government levels to support accurate forecasting and distribution
 - » The development of Education Social Impact Bonds, which encourage greater investment based on impact results and greater accountability through the process

2. Multi-sectoral partnerships that build on existing programs by taking them to scale. This could look to build on the work of:
 - » VSO (Voluntary Service Overseas), Norwegian Agency for Development Cooperation, and KfW Development Bank regarding digital classrooms with support from Airtel and potentially other Internet service providers in country
 - » Nascent partnerships between the MIE and local publishers that include their international publishing partners in developing a greater reading culture through a stronger writing culture, classroom libraries, and an affirmative book policy
 - » Other countries that have created partnerships that reach across sectors to include a variety of areas that impact the lives of children, such as health and nutrition
3. Focused partnerships that may not provide scale but would further engender the spirit of collaboration, build good will across sectors, and lay the foundation for greater opportunity within the book supply chain. For example, the Braille Cup, organized by RTI International and MERIT and supported by a local private sector company, ensures the accessibility of learning materials to an often-forgotten group.

Analysis of all the data is underway and the Partnerships Assessment report will be available at the end of April 2020 to build on the learnings and recommendations from the Malawi Book Supply Chain Analysis.

ANNEX 8: BACKGROUND OF THE GLOBAL BOOK ALLIANCE

The lack of access to quality and appropriate materials provides an insurmountable barrier to learning, resulting in over 600 million children and adolescents who are not learning the basics of reading and mathematics. In part, this is because 40% of young learners cannot access an education in a language they understand – either because they are not available in their schools or communities – or the books simply do not exist in those languages.

To help address the issues around this lack of materials, the Global Book Alliance (GBA)⁵⁶ has been established to provide research, support and training to various stakeholders. A partnership of donor agencies, multilateral institutions, and civil society organizations, the GBA was established in 2018 to bring together global education partners to end illiteracy through a coordinated effort to address the challenge of the growing book gap.

USAID's Global Book Alliance in Action project is a two-year initiative (2019–2021) that works with the GBA and with Ministries of Education, education partners, the private sector, and diverse other stakeholders to improve national book supply chains through identifying, promoting, and supporting innovations, best practice, and policies to change the way that books are created, procured, and provided.

As part of the research carried out in support of the GBA, SCAs are being conducted in eight countries to identify country-specific strengths and challenges related to book provision and to enhance the global knowledge base of promising practices across the book supply chain.

The SCAs are conducted by a team of international and national experts who meet with a variety of stakeholders, including staff in Ministries of Education and other government agencies, suppliers of books to kindergarten and primary school children, NGOs, and private sector actors, such as transport companies. The SCA research consists of background data-gathering, desk research, approximately two to three weeks of in-country meetings, follow-up, recommendations, and report writing. This research is then followed by capacity-building activities to help stakeholders implement steps to improve book supply chain functions in the respective countries.

The initial SCA research was conducted in Malawi in November and December 2019, as outlined in this report.

56 Learn more at the GBA website (<https://globalbookalliance.org/>).

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