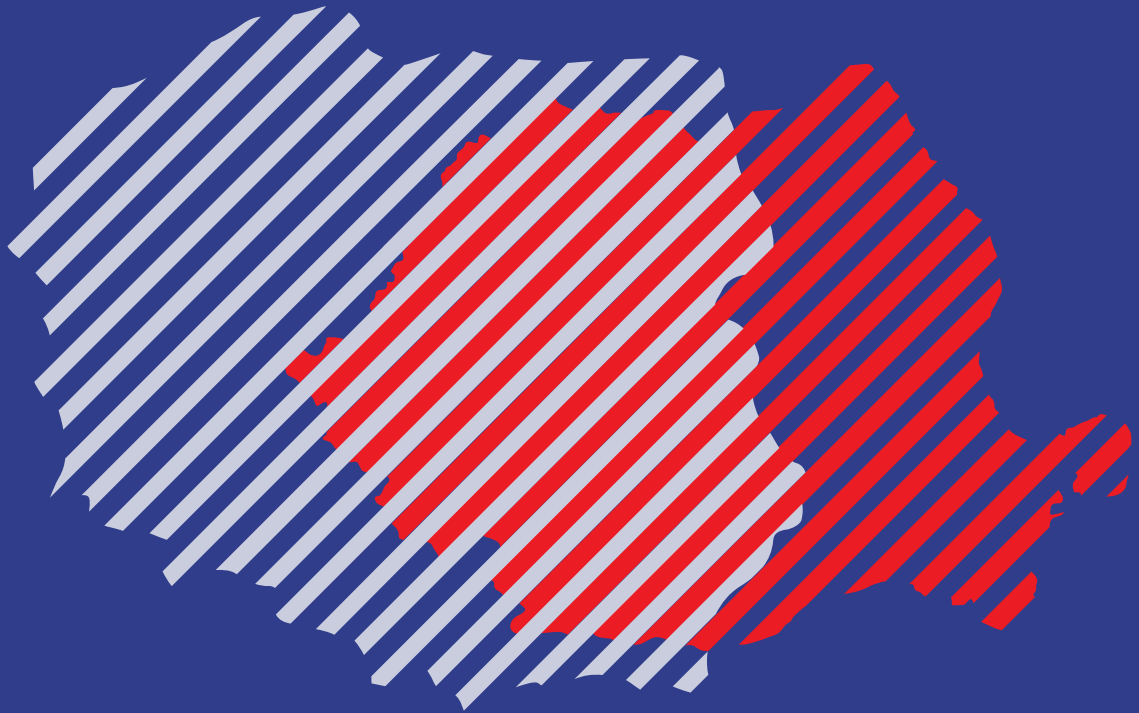


# Open textbooks

in public education.

Experience from Poland and Romania.

---



OPEN  
EDUCATION  
POLICY FORUM

# Introduction

The purpose of this policy brief is to provide an overview of changes to the models for provision of textbooks in public education in Poland and Romania. In both states, changing textbook provision models created an opportunity for introducing an open licensing rule for public textbooks.

In Poland, changes introduced in 2014 led to a model, in which publicly created open e-textbooks complement and to some extent compete with commercial offerings. This also translated to significant savings for parents of schoolchildren, and taxpayers in general. The government continues to fund the creation of additional OERs and new measures are taken to reduce barriers to OER adoption.

In Romania, a reform conducted in 2017–2018 is causing a shift from market to public provision of textbooks. Copyright-related issues remain a crucial factor and the government decided to acquire intellectual property rights to the textbooks. This creates an opportunity to openly license publicly funded textbooks.

This policy brief was written by Alek Tarkowski (Centrum Cyfrowe, Poland) and Ovidiu Voicu (Center for Public Innovation, Romania) for the 2018 Open Education Policy Forum.



This brief is licensed under a Creative Commons Attribution 4.0 International License. License text is available at: <https://creativecommons.org/licenses/by/4.0/>

# Poland: textbooks in public education

## **Free education, free textbooks**

In Poland, education is free for all for the entire length of pre-university education (ISCED 1-3), and compulsory for grades 0-8 (ISCED 1-2). Tertiary education is also free but only a limited number of places are offered each year. In primary and secondary education (grades 0-12, ISCED 1-3), approximately 95% of the students are enrolled in public schools.

In 2014, Poland began funding the purchase of majority of textbooks and additional teaching materials from public funds. For grades 1-8, textbooks are purchased by schools and loaned to students free of charge. In addition, schools provide for free workbooks and can also decide to provide access to digital resources. In grades 9-12, students and their parents have to purchase textbooks. In order to make the necessary purchases, counties (which in Poland are responsible for running public schools) receive a subsidy from the state budget.

Students receive the textbooks at the beginning of school year and return it at the end. If they fail to return it or damage it, they must return a new textbook or pay for its cost. Textbooks are replaced with new ones when they are too damaged to be used anymore. Schools are expected to use purchased textbooks for three consecutive years.

## **The content of education and the role of textbooks**

The Core Curriculum is established through an ordinance of the Ministry of Education. The Core Curriculum defines obligatory sets of educational goals and content of education. It also defines specific requirements concerning knowledge and skills, which a student needs to obtain at a given educational level. Based on the Core Curriculum, schools and teachers determine their curricula.

Teachers are allowed to teach using textbooks, workbooks, other educational resources or without using any resources. Teachers are in particular given the freedom not to obtain textbooks through the procurement system based on the state subsidy. Nevertheless, textbooks remain the core teaching resource for a

definite majority of teachers, and in many cases the textbook and workbook sets are the only resource used in the classroom.

Textbooks need to be certified by the Ministry of Education. The Ministry makes the decision once a publisher submits a textbook for certification, and based on an opinion of educational experts hired by the Ministry. In order to be certified, textbooks need to comply with the Core Curriculum. Textbooks cannot include workbook elements (which would force schools and students to replace them each year) and cannot include advertising. They can have either paper or digital form. There are no limits to the number of textbooks for each subject and level that can be certified

## **Digital textbooks**

Since publishers are not obliged to provide digital versions of textbooks, these are not common. In 2013, only 18% of textbooks were made available by their publishers in digital form – most of them as non-interactive, fixed PDFs. In school year 2016/2017, only 6% of schools made use of any digital textbook. These are not treated as separate market products, but rather as supplement to the paper versions. While no precise data on the use of these digital versions is publicly available, these resources are not commonly used in schools. This is mainly due to the lack of necessary equipment and low digital skills of teachers.

## **Textbooks provision: three models**

### **Until 2014: commercial textbooks purchased by parents**

Until 2014, commercial textbooks were purchased by parents, based on a choice made by teachers. This has been criticized as causing overly burdensome costs to parents. Limited state subsidy was only available to families in difficult financial situation.

### **2011–2014: provision of public textbooks and state subsidy for textbook purchases**

Changes to the textbook provision system were initiated in 2011, when the government launched the e-podręczniki.pl open e-textbooks program (which resulted with a release of open, public e-textbooks in late 2015). By 2014, the Ministry of Education overhauled the textbook provision model. Based on new rules, there were four modes of textbook provision:

- Textbooks for grades 1-3 were publicly funded, produced, printed and distributed by the Ministry of Education under an open license;
- Textbooks for grades 4-9 were purchased by schools from commercial publishers, using subsidies from the state budget;
- Textbooks for grades 10-12 were still purchased by parents from commercial publishers;
- Open e-textbooks were produced with public funding

By 2015 – when the open e-textbooks were launched – this resulted in a complex system that included both an experimental mode of public provision of textbooks for grades 1-3, and market provision of textbooks for grades 4-12. Open e-textbooks could in principle be used as the sole teaching resource, but in reality, most teachers opted to use the subsidy and purchase commercial textbooks for students.

### Starting with 2017: revision of the public provision model

In 2017, the government stopped providing public textbooks for grades 1-3. Instead, the model based on a public subsidy for purchase of commercial textbooks was introduced for all grades 1-9. The government continues to support the production of digital OER content for a range of subjects and levels of education. Additional measures are taken to lower barriers to the use of digital resources (including open e-textbooks) in schools.

## The “public subsidy” model

### How it works

<b>Framework</b>	The Ministry of Education certifies commercial textbooks that are compliant with the Core Curriculum.
<b>Market provision of textbooks</b>	Commercial publishers develop, print and distribute textbooks. These are purchased by schools, using a state subsidy.
<b>Price cap</b>	The Ministry of Education defines each year price caps for textbooks and workbooks. These caps are a key factor that determine the size of the market and the budget of commercial publishers.

<b>Selection by teachers</b>	The body of teachers in each school collectively chose a single textbook for each grade and subject. Based on their decisions, commercial textbooks are purchased by county administration from commercial publishers, using a subsidy from the state budget.
------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

### Pros and cons

(+) Diversity	Teachers may choose for a variety of textbooks, according to the needs of their students. Market competition is commonly seen as a factor that supports textbook quality.
(+) Market centralization	As a result of the introduction of price caps by the state, many publishers began offering their textbooks to schools only as bundles. This resulted in smaller publishers, who often depended on successful sales of a single title, to go out of business.
(-) Effect on distributors	In the past, parents would purchase textbooks from bookstores – for which textbook sales has been a major source of revenue. In the new model, textbooks are distributed by publishers directly to schools. As a result, some bookstores have went out of business, especially in smaller towns.
(-) Copyright	The intellectual property rights for the textbooks remain with the publishers. The government has not used the fact that textbook production is now fully subsidized to negotiate a different arrangement.

### The “public provision” model: open e-textbooks

Since 2014, the Polish Ministry of Education has experimented with two different models for public provision of textbooks. In 2014, public production of textbooks for early education (grades 1-3) was initiated. The textbooks were produced at a lower cost than commercial alternatives. Yet they were often seen as inferior in quality (although no official comparison or evaluation was conducted). Public opinion also feared that public provision of textbooks will ultimately lead to a model, where only a single textbook is available for a given subject and grade – destroying diversity that is commonly seen as beneficial. Finally, the implementation of open licensing

was faulty, as the textbooks included a range of graphical elements that were not freely licensed.

In late 2015, the open e-textbooks were launched through the [epodreczniki.pl](http://epodreczniki.pl) repository. These textbooks had been produced since 2011 as part of a larger “Digital school” program, funded with EU funds. These e-textbooks are publicly available until today, and the Ministry continues to fund new OER content using EU funding. Since teachers are not obliged to use these open textbooks, they ultimately remain in most cases supplementary resources.

### How it works

<b>Framework</b>	Public textbooks are certified just like their commercial counterparts, and need to comply with the Core Curriculum.
<b>Textbook provision</b>	Paper textbooks for grades 1-3 have been produced in-house by the Ministry of Education (including printing and distribution). Digital textbooks were produced by external contractors (mainly public universities) through tenders conducted by the Ministry of Education.
<b>Teachers' choice</b>	In the case of paper public textbooks for grades 1-3, lack of choice is seen as one of the main reasons for terminating the program. In the case of open e-textbooks, teachers have the freedom to choose between them and commercial textbooks (or to use both).
<b>Textbooks as OERs</b>	In both cases, textbooks were made available as OER under a Creative Commons Attribution (CC BY) license. In addition, the digital textbooks have to be available in at least one open format, and to meet accessibility requirements.

### Pros and cons of open e-textbooks

(+) Diversity	Teachers continue to choose from a range of textbooks, both provided both by the state and commercial publishers. The model retains market competition and diversity, which are seen as positive factors for ensuring textbook quality.
(+) Price effectiveness	Comparison of cost effectiveness of market and public provision of textbooks shows that the latter is a more effective model –

	provided that the public textbooks are commonly used in schools.
(+) Budget savings	Reforms introduced in 2014 lead to significant savings for the taxpayers – due mainly to the fact that price caps introduced by the Ministry significantly lowered the overall costs of textbook provision.
(-) Low use rates	According to official statistics, only 2% of teachers use open e-textbooks. This is commonly seen as due to insufficient support and training, lack of necessary equipment and online access in schools, and lack of digital skills among teachers. Low use rates affect adversely cost effectiveness of public provision of textbooks.
(+) Copyright	The open e-textbooks program, conducted in 2011-2015 as part of the larger “Digital school” program, successfully introduced open licensing of public educational content in Poland. Open licensing has been a requirement in multiple tenders for educational resources conducted since 2015.

## 2018: Public provision of OERs Continues

Since the launch of the open e-textbooks platform in 2015, there have been several important developments that should be seen as further steps towards a general Open Educational Resources policy in Poland.

Firstly, the government continues to support the creation of public OERs, through a range of grant programs supported by EU funding from the European Social Fund. Since 2016, following funds from the Operational Program POWER were allocated:

- 17.4 million złoty (approximately 4.14 million Euro) for creating OERs for vocational training;
- 23.3 million złoty (approximately 5.54 million Euro) for creating supplementary OERs for open e-textbooks;
- 70.9 million złoty (approximately 16.88 million Euro) for creating OERs for teaching 10 core subjects in high schools;
- 3.8 million złoty (approximately 0.9 million Euro) for developing new technical functionalities of the epodreczniki.pl platform and a new functional and didactic concept for e-textbooks.



Secondly, open licensing is a requirement in all major grant programs that fund development of educational content. Such requirements are also present in digital skills development programs, funded through grants from the Digital Poland Operational Program (*Program Operacyjny Polska Cyfrowa*). In 2015, a general open licensing requirements was introduced for all educational content created within any of the projects funded from the European Social Fund. This requirement covers a very broad range of grant programs worth approximately 35 billion Euros, to be conducted until 2021.

Thirdly, the government committed to providing broadband access to all schools by 2020. Lack of online access of sufficient quality remains one of the factors that limit the use of digital resources in schools, including OERs. Furthermore, the National Educational Network (*Ogólnopolska Sieć Edukacyjna*), will consist not just of broadband access infrastructure, but also a layer of educational services. The Network creates an opportunity to develop a national OER repository as its part, for example on the basis of the e-textbooks platform. At the moment, while development of physical infrastructure continues, no specific plans for the services layer have been unveiled.

Fourthly, a new grant program, announced in mid-2018, will tackle the issue of low digital skills among teachers. Approximately 12 million Euros will be spent on a national program that will train 15% of all Polish teachers from public schools. As part of the program, teachers will create OERs and lesson scenarios that utilize existing open resources. New resources will be made available under a CC BY license on an online platform that in the future might be integrated with the e-textbooks platform and the National Educational Network. With this program, the government hopes to address one of the major barriers to the uptake of OERs, and more broadly speaking digital resources, in Polish public schools.

# Romania: textbooks in public education

## **Free education, free textbooks**

In Romania, education is free for all for the entire length of pre-university education (ISCED 1-3), and compulsory for grades 0-9 (ISCED 1-2). Tertiary education is also free but only a limited number of places are offered each year.

In primary and secondary education (grades 0-12, ISCED 1-3), 95% of the students are enrolled in public schools. For all of them, the state provides textbooks free of charge. The textbooks are loaned to the students.

Students receive the textbooks at the beginning of school year and return it at the end. If they fail to return it or damage it, they must return a new textbook or pay for its cost. Textbooks are replaced with new ones when they are too damaged to be used anymore. Schools have the responsibility to check the situation yearly.

## **The content of education and the role of textbooks**

The Government approves the National Curriculum Framework, based on the work and recommendations of a national expert group.

The Ministry of Education decides on the content of education, for each subject and teaching level, using the recommendations of specialized groups that work under the Institute for Education Sciences (public research center under the ministry of education). All these materials are part of the National Curriculum, detailed on years of study and subjects. The Curriculum is compulsory for all teachers.

Legally, textbooks are only one of the many possible educational resources. Teachers are free to use them or not. But because they are provided for free, and because of they were the main, compulsory resource for over 70 years, textbooks continue to play a central role in the public education. Many teachers are using them as the main, or even the only resource in classroom.

## Digital textbooks

Starting with 2011, the digital textbooks were introduced (for new textbooks). It includes both the PDF version of the printed one, and an interactive version with some additional content. All of them can be viewed free of charge on [www.manuale.edu.ro](http://www.manuale.edu.ro) (in Romanian).

## Textbooks production: three models

### Until 1996: one official textbook for each subject

The historical model, introduced before the WW2, and continued during the communist regime and few years after, was that for each subject there was one textbook produced by the Ministry of Education and distributed in schools.

### 1996–2017: alternative textbooks produced by commercial publishers

The Ministry of Education was publishing guidelines for textbooks and organizing a tender to select one or more textbooks for each subject (on average 3, maximum 9 were selected). Commercial publishers were proposing the textbooks. The teachers were free to choose any of the approved textbooks, and a centralized order was placed to publishers, based on the teachers' request.

### Starting with 2018: textbooks produced by a state company

A new model is being introduced starting with 2018. A state owned company is purchasing the content of textbooks from the authors (individuals or publishers), and it is producing the textbooks. In theory, the idea of alternative textbooks is maintained but for the textbooks produced so far (for 6<sup>th</sup> grade), there is only one per subject.

## The “alternative textbooks” model (1996–2017)

### How it works

<b>Framework</b>	The Ministry of Education publishes the guidelines and criteria for the evaluation of the textbooks (content and price).
<b>Tender</b>	Commercial publishers proposes a package of services: textbook (fully edited), printing, distribution, and (since 2011) digital textbook.

<b>Content evaluation</b>	A specialized committee, comprised of teachers and experts on education, receive anonymized textbooks and evaluate them using the published criteria. All textbooks that pass a certain threshold are approved.
<b>Price evaluation</b>	From the approved textbooks, only those that met the price criteria (below a threshold calculated based on the average prices offered) are considered official textbooks, i.e. eligible for state subsidies. The rest may be used in class but the parents have to buy them.
<b>Catalogue</b>	The official textbooks (meeting both content and price criteria) are published in the national catalogue of textbooks (since 2011, also online, on <a href="http://www.manuale.edu.ro">www.manuale.edu.ro</a> ).
<b>Teachers' choice</b>	Each teacher is free to choose any of the textbooks in the Catalogue, in consultation with the parents.
<b>Centralized order(s)</b>	Orders are centralized at County level, and placed to publishers. The Ministry pays the costs of the textbooks delivered to schools.

### Pros and cons

(+) Diversity	Teachers may choose for a variety of textbooks, according to the needs of their students.
(+) Competition	In the first years, the quality of textbooks has increased because of the competition between the teachers.
(-) Unfair competition	Taking advantage of the way the price criteria was formulated, some publishers started to offer services at very low prices, so the threshold went low. In some cases, textbooks were purchased at under 2 euro/piece. Quality dropped.
(-) Complexity	In time, the public procurement procedures become more and more complex. Content purchasing is simply not fitting the general procurement framework.  An important limitation is given by the existing stock of textbooks. If a teacher wants to select a different textbook that

	<p>the ones that the school have (for example, if a new teacher is hired by the school), the procedures can be very complicated. The school should send the whole stock of books and ask for new ones, explaining the request. This rarely happens.</p>
(-) Market practices	<p>Publishers make little profit when they sell to the ministry, or this is what they say. The authors are the indirect victim of this situation, because they are very poorly paid. Instead of receiving royalties for each book sold, they get only a fixed fee when they write the book.</p> <p>Also, the publishers are publishing „support books”, associated to each textbooks. This have various names („student’s notebook”, „collection of support materials” etc.) and, in theory, are optional, because legally the textbooks should be sufficient by itself. The publishers insist that these materials greatly improve the education outputs and co-inters the teachers in selling them.</p> <p>Small corruption becomes an increasing problem. Publishers are offering bonuses to teachers that select and distribute certain manuals. These bonuses range between 5% and 25% of the value of the textbooks and support books sold. It is questionable if the teachers select a certain textbooks because it is a good one or because of the bonuses.</p>
(-) Copyright	<p>The intellectual property rights for the textbooks remains to the publishers exclusively, although the full cost of production is covered from public money.</p> <p>The commercial publishers can’t use the exception for education embedded in the Romanian legislation on copyright, limiting their ability to use newer content and increasing the price of the final product.</p>

## Evaluation

The initial idea of “alternative manuals” was generous and ambitious, aiming at gradually increasing the quality of textbooks. But, in time, the commercial practices and legislative complexity have drastically limited the impact of the model.

There is a general consensus among teachers and other education specialists that the textbooks are outdated and need a major reform. However, the publishing industry disagrees.

## **The “state-owned company” model (2018)**

### **An incomplete reform**

The idea to switch to a more centralized model appeared in the first half of 2017. The reform had several objectives:

- To allow the Ministry to work directly with the authors, by separating the production and distribution from content creation;
- To improve the copyright situation, in two directions: acquiring the intellectual property rights in the public domain, and taking advantage of the exception for education;
- And to put an end to the unfair market practices signaled by teachers.

Unfortunately, the last two years were marked by government instability: between January 2017 and February 2018, Romania had three different prime-minister, and a similar number of ministers of education. Although the political majority remained the same, the government instability affected the capacity to implement coherent policy reforms, and the textbooks reform suffered.

The reform has two components:

- Reforming the legal framework through the new Textbook Law. But the Law was not yet adopted, being sent back to the Parliament by the Constitutional Court because it was discussed in the wrong order by the two Chambers of the Parliament (!).
- Changing the administrative practices by transforming an existing public publisher (EDP – *Editura Didactica si Pedagogica*) into a State-Owned Company, with the mission of producing and distributing textbooks. After several delays due to administrative errors, EDP was set-up as SOE late in 2018, and it is working with a reduced staff, not being able to implement the process thoroughly.

We will present the model as it was supposed to work, indicating the parts that are not yet fully implemented.

## How it works

<b>Framework</b>	The Ministry of Education publishes the guidelines and criteria for the evaluation of content of the textbooks, and sets fixed fees for authors.
<b>Tender</b>	EDP, State-Owned Enterprise, organizes a competition for authors (individuals, group of individuals or companies).
<b>Content evaluation</b>	<p>A specialized committee, comprised of teachers and education specialists, evaluate the textbooks.</p> <p>Between one and three textbooks for subject are selected for next phase – not implemented yet. Instead, only one textbook was selected.</p>
<b>Teachers' choice</b>	<p>The selected textbooks are published online. The one most selected by teachers is declared winner, and becomes the baseline textbook.</p> <p>(not yet implemented. Selection was made by EDP)</p>
<b>Printing and distribution</b>	The baseline textbook is printed and distributed to all schools.
<b>Textbooks as OERs</b>	Both the baseline textbook and the other selected textbooks will be available online, under open license, and can be used by teachers – not implemented.

## Evaluation

As the result of the late implementation, and under pressure to produce some textbooks for the 6<sup>th</sup> grade before the start of school year, EDP proceed with a limited model, as explained above. The result is far from what was expected. Hopefully, the model will be completed in the following months, allowing for a proper evaluation of its pros and cons.



Alek Tarkowski is the President of the Centrum Cyfrowe Foundation (<https://centrumcyfrowe.pl/en/>). Centrum Cyfrowe is a Polish organization supporting openness and participation in the digital world. We are making the world more inclusive, more cooperative and more open by changing the way people learn, participate in culture, use the internet and exercise their rights as internet users. We are part of the Polish Coalition for Open Education (KOED) and founders of the Open Education Policy Network.

For more information, please contact Alek Tarkowski at:

[atarkowski@centrumcyfrowe.pl](mailto:atarkowski@centrumcyfrowe.pl), +48889660444



Ovidiu Voicu is the Executive Director of the Center for Public Innovation (<http://www.inovarepublica.ro/center-public-innovation/>). The Center for Public Innovation is a Romanian non-profit organization that promotes open society, seeks to strengthen the rule of law, supports an inclusive society, and promotes models of development based on social innovation. CIP ensures the secretariat of the Coalition OER Romania, a platform of organizations and individuals that promote open data in education and open educational resources in Romania.

For more information, please contact Ovidiu Voicu at:

[ovidiu.voicu@inovarepublica.ro](mailto:ovidiu.voicu@inovarepublica.ro); +40723522340