

Report of
the Task Force to Review Learning and Teaching Materials

December 2011

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Chapter 1 Preamble

1.1 Textbooks are part of a wide range of learning resources available to students. Based on the curriculum guides/ syllabuses issued by the Curriculum Development Council (CDC), textbook publishers systematically organise and compile learning materials to achieve the objectives of the curriculum. Appropriate use of quality textbooks not only supports teaching, but also enhances student learning.

1.2 Textbook prices, however, have been the concern of various sectors of the community in recent years. The existing practice by publishers of bundling the sale of most textbooks with learning and teaching materials has resulted in increasing textbook prices and market distortion. In view of this, the Education Bureau (EDB) set up the Task Force to Review Learning and Teaching Materials (hereafter referred to as “the Task Force”) in June 2011 to review and examine the issues in connection with the policy of debundling textbooks and learning/ teaching materials for pricing, in particular the textbook review system, the operation of the Recommended Textbook List, as well as other measures concerning the supply of learning/ teaching materials, to ensure the provision of quality textbooks and learning/ teaching materials that are worth their prices. Chaired by the Under Secretary for Education, Mr Kenneth Chen, the Task Force consists of 11 members and is made up of principals, teachers, parents, a Consumer Council representative, as well as academics and businessmen with professional knowledge in education and market operation. Members are appointed on an ad personam basis. The membership list and terms of reference of the Task Force are at **Annex 1**.

1.3 From June to November 2011, the Task Force conducted detailed discussions and in-depth analyses regarding the issue, examining the current situation and exploring appropriate improvement measures. This report concludes the results of the discussions and proposes specific recommendations to the Secretary for Education (SED), which will serve as reference for the EDB in formulating relevant strategies and measures to improve the provision of textbooks as well as learning/ teaching materials of other forms.

1.4 Throughout the entire course of discussion and analysis, the Task Force has been adhering to the principle of enhancing the quality of learning and teaching. Proposals and feasible improvement measures on the development of learning and teaching materials have been considered based on this principle. All suggestions made by the Task Force are aimed at improving the existing textbook review system and the Recommended Textbook List, encouraging an open market for textbooks, creating healthy and fair competition for the diversified development of textbooks, thus creating room for the reduction of textbook prices. The ultimate goal is to provide to schools quality and curriculum-driven learning and teaching materials that are value for money to enhance the learning effectiveness of students.

Chapter 2 Analysis of the Present Situation

The Policy of Debundling Textbooks and Learning/ Teaching Materials for Pricing

2.1 In response to public concern (especially that of parents) about the ever-increasing textbook prices, the Government set up the “Working Group on Textbooks and e-Learning Resources Development” in 2008 to study the development of textbooks and e-learning resources. In the report submitted by the Working Group to the SED in October 2009, one of the recommendations regarding textbooks was the implementation of the “Policy of Debundling Textbooks and Learning/ Teaching Materials for Pricing” (hereafter referred to as the “debundling policy”) in the 2010/11 school year.

2.2 The debundling policy aims at rectifying the existing practice of bundling the sale of textbooks with teaching materials by adopting the user-pays principle. This helps to avoid the provision of unnecessary learning/ teaching materials by textbook publishers, thus reducing wastage. It also drives publishers to cut production costs (through measures such as reducing over-packaging and avoiding the offer of floral baskets or luxurious receptions to schools and teachers on festive/ auspicious occasions) which will in turn help to lower the prices of textbooks and alleviate the financial burden on parents.

2.3 Taking into account the time needed for textbook publishers to clear copyright for their materials and the efforts they made in freezing textbook prices for the 2010/11 school year, the EDB agreed last year that the implementation of the debundling policy would be postponed for one year. After a transitional period of one year, the debundling policy should be implemented in the 2011/12 school year as scheduled.

2.4 To facilitate the implementation of the debundling policy, the EDB issued to schools a circular memorandum on 13 April 2011 stipulating that, with immediate effect, schools were not allowed to accept or solicit from textbook publishers complimentary textbook-related learning/ teaching materials. Schools were also not allowed to accept any donations, or any form of benefits, from textbook publishers or textbook retailers, including floral baskets and luxurious receptions.

2.5 Despite the strong demands for debundling and reduction of textbook prices from various sectors of the community, especially parents, the textbook publishers claimed that because of copyright issues, they could only afford to debundle a very few of the new or revised textbooks on the Recommended Textbook List this year. The rest of the existing textbooks and learning/ teaching materials, they reckoned, would only be fully debundled for pricing in three years’ time starting 2012.

Temporary Measures Taken by the EDB

2.6 To fully examine the impact of the above issue on learning and teaching, the SED met with subject panel heads from more than 100 primary and secondary schools between 11 and 20 May 2011. All teachers involved supported the debundling policy and pointed out that only a small portion of the complimentary teaching materials provided by textbook publishers had been frequently used. Most of the complimentary materials were considered unsuitable, thus causing wastage and were unfriendly to the environment. At the meetings, teachers also expressed the urgent need for access to:

- the inspection copies of textbooks when selecting new textbooks for students; and
- the assessment banks developed by textbook publishers, in particular the assessment banks for the Secondary 6 (S6) level in order to prepare students for the first Hong Kong Diploma of Secondary Education Examination to be held in the coming year.

2.7 To meet teachers' pressing needs, the EDB issued a circular memorandum dated 1 June 2011 to inform schools of the special measures to be adopted by the EDB, including permitting schools to borrow from publishers inspection copies of textbooks (including existing, newly-published and newly-revised textbooks) to facilitate teachers' selection of suitable textbooks for students, and permitting S6 teachers to borrow assessment bank materials from publishers for use in the 2011/12 school year with immediate effect. Schools should return all inspection copies of textbooks and assessment materials borrowed from the publishers by the end of the school year. Other than the above two special arrangements, schools are not allowed to receive any complimentary teaching materials, donations, or any form of on-loan service from textbook publishers.

2.8 Meanwhile, the EDB requested the textbook publishers to provide, within one year, individual prices for teaching materials that are most needed by teachers, including major items such as teachers' books, assessment bank materials and audio discs, so that schools can purchase from textbook publishers what they require according to their own needs. The EDB also repeatedly indicated that sufficient resources would be provided for schools to purchase teaching materials.

Problems Faced by Schools and Parents

2.9 Despite the strong demands from various sectors of the community, the textbook publishers reiterated in November 2011 that it would take them three years to fully implement the debundling policy, as they had to resolve copyright issues for the major subjects for primary and junior secondary levels (in 2012), the rest of the subjects for primary and junior secondary levels (in 2013) and the new senior secondary subjects (in 2014).

2.10 At present, textbook publishers have not yet implemented the policy of debundling all the teaching materials needed by teachers (e.g. teachers' books) for pricing and sale in response to the request by the EDB, and schools are not allowed to accept complimentary teaching materials provided by textbook publishers, or else the burden of their costs will be levied on the shoulders of parents. Under such circumstances, teachers are faced with the scenario of having no teaching materials debundled for sale and no complimentary teaching materials provided. At the same time, textbook prices have remained high, inducing a heavy financial pressure on low-income families.

Summing Up

2.11 In view of the distortion of the textbook market, the Task Force's foremost tasks are to explore how to provide schools with quality and reasonably-priced learning/ teaching materials; examine the existing textbook review system to enhance healthy competition so that more quality and value for money textbooks can enter the market; and safeguard the quality of textbooks by improving the Recommended Textbook List.

Chapter 3 Discussions and Recommendations of the Task Force

3.1 From June to November 2011, the Task Force conducted detailed discussions on and in-depth analyses of the issue. This chapter summarises the Task Force's advice and recommendations as follows:

A. Provision of Quality and Value for Money Learning and Teaching Materials

Developing the e-textbook Market

3.2 The Task Force observed that printed textbooks are important learning tools for students but they are not the only kind of learning materials. In our digital age, using e-learning resources to enhance learning and teaching effectiveness has become the major trend of education. Many countries and regions, including South Korea and California of the United States, have developed e-textbooks while Thailand has launched a pilot scheme on e-textbooks.

3.3 The Task Force noted that since 1998, the Government has invested nearly \$9 billion into implementing three Strategies on IT in Education and spent approximately another \$0.4 billion on developing e-learning resources. On a separate front, the EDB developed a one-stop portal for online e-learning resources as well as an online community for teachers to encourage greater sharing and exchange of resources. An e-commerce platform was also set up at the Hong Kong Education City website to facilitate the development of the e-learning resources market. At present, the EDB provides different kinds of funding for public sector schools, including the Composite Information Technology Grant, the Operating Expenses Block Grant or Expanded Operating Expenses Block Grant, and the One-off Grant for Procurement of e-Learning Resources to help them cope with the expenses of IT in education.

3.4 After years of development, schools today have a sound IT infrastructure. A commissioned study conducted by the Hong Kong Institute of Education in 2010 showed that schools had already been well-equipped with the necessary supporting facilities for e-learning, taking into account the number of computers as well as the available computer networks and platforms in schools. The education sector in general believes that e-learning can facilitate interaction between teachers and students, enhance students' interest in learning and address learner diversity. The Pilot Scheme on e-Learning in Schools introduced by the EDB in 2011 has received over 100 applications from secondary, primary and special schools, indicating the increasing popularity of e-learning among schools.

3.5 Recently, the Government has launched the "i Learn at home" Internet Learning Support Programme to help low-income families acquire affordable computer equipment and Internet access services, and provide them with technical support, with the aim of assisting needy students to enjoy equal opportunity to undertake web-based learning at home.

3.6 The Task Force opined that this is an opportune time to further implement e-learning and suggested that e-learning resources move beyond their existing supportive role (as resources to complement traditional printed textbooks) to the more vital role of “e-textbooks”. As e-textbooks, they will form a complete and independent set of learning and teaching materials, and will be developed according to the curriculum objectives, contents and implementation requirements set by the CDC as in the case of the traditional printed textbooks.

3.7 The Task Force was of the view that depending on the capacity of teachers and students as well as the readiness of schools, school education should gradually shift from a pedagogy largely dependent on printed textbooks to a more interactive learning mode based on e-learning resources. This can better address learner diversity and meet the needs of different subjects, thus enhancing the effectiveness of learning and teaching. The Task Force also recommended that to assist schools in transitioning and adapting to the new learning mode, the newly developed e-textbooks should have a print-on-demand function that would allow schools to print the contents of the textbooks on a need basis.

3.8 The development of e-textbooks can provide an interactive and diversified learning mode other than learning through printed texts. It can also enhance the flexibility in compiling textbooks, as well as reduce the costs of production, printing, storage and logistics. Moreover, individual modules can be priced and put on sale separately. This would make textbooks more affordable, as customers could purchase different modules according to their needs.

3.9 Recognising that the textbook is an essential learning tool for students and the necessity to address the issues of distortion and monopolisation in the traditional printed textbook market, the Task Force stressed the need to introduce competition in developing the e-textbook market. It recommended that the Government should play a more pro-active role in spearheading the direction for development, expanding the market and providing incentives and assistance to attract more organisations interested in e-textbook production to join the market so as to provide the education sector with quality and reasonably-priced e-textbooks.

3.10 At present, schools have introduced e-learning resources on campus to different extents. Whether e-textbooks can replace printed textbooks as the mainstream learning resources will depend on the degree of acceptance of teachers, parents and students towards e-textbooks, and how well teachers are prepared to make effective use of e-textbooks in teaching. The Task Force therefore stressed that to promote e-textbooks, the Government should adopt appropriate planning and support measures, such as examining the hardware needs of schools and strengthening the support for teachers.

B. Improvement of the Textbook Review System

3.11 The textbook review system was established in 1972 to ensure the quality of textbooks used in Hong Kong. Textbooks submitted by textbook publishers for review should be written in line with the curriculum guides/ syllabuses issued by the CDC. The review covers, among others, the contents, learning and teaching approaches, language and technical design of the textbooks.

3.12 For subjects that require the use of textbooks, corresponding textbook review panels have been set up. There are 30 textbook review panels under the Textbook Committee. Their membership comprises teachers, principals and academics from tertiary institutions who volunteer to undertake textbook reviews of various subjects. Under the existing system, each set of textbooks is reviewed by not less than three textbook reviewers, including two non-EDB external reviewers and one EDB subject curriculum development officer. The identity of the textbook reviewers is kept confidential. To ensure that all members of a textbook review panel would have an equal chance to take part in textbook reviews and to reduce the risk of collusion between reviewers and publishers, the reviewers are arranged to take turns in reviewing the textbooks.

3.13 Based on the Guiding Principles for Quality Textbooks compiled by the EDB, the curriculum guides/ syllabuses issued by the CDC as well as Key Learning Area (KLA)/ subject guides, the reviewers will examine all the textbooks submitted for review. The review panel of each subject will conduct detailed analyses taking into account the grades and comments given by individual reviewers. Only those textbooks which have satisfactorily met the core criteria will be included in the EDB's Recommended Textbook List.

3.14 It is not a must for textbook publishers to submit their textbooks to the EDB for review. Similarly, schools are free to select textbooks and learning materials which are not on the Recommended Textbook List for use. However, many schools regard the review system as a quality assurance mechanism and will therefore select their textbooks according to the Recommended Textbook List compiled by the EDB. As a result, publishers consider it very important for their textbooks to pass the review and be included in the Recommended Textbook List.

3.15 The Task Force was of the view that the textbook review system has been in operation for almost 40 years, and that it has worked well to help enhance the quality of textbooks. The Recommended Textbook List has enabled schools and teachers to select textbooks efficiently. Moreover, by virtue of the textbook review system, the writers and compilers of textbooks are aware of the curriculum requirements and the criteria for quality textbooks. Therefore, the Task Force opined that the textbook review system should be retained, but ways should be explored to improve the following aspects of the existing textbook review

system to cope with educational and social changes.

3.16 The criteria adopted by the EDB's Textbook Review Report are based on the Guiding Principles for Quality Textbooks promulgated in 2003.

3.17 While the present textbook review criteria are deemed very comprehensive, the Task Force recommended that, in addition to retaining the core criteria in the textbook review (such as coverage and language), new criteria be added so as to keep abreast of the latest developments. These include comprehensive textbook contents, suitability for independent use, catering for the learning needs of students of different abilities, textbook arrangements, and designs conducive for textbook recycling.

3.18 At present, publishers are required to submit textbooks for review by Key Stage (i.e. a three-year block) and the quarterly textbook submissions are January, April, July and October respectively. The whole process of textbook review, from textbook publishers' submission of textbooks for review to the EDB's release of the review results, will take about three months, which is considered not a long period of time by the Task Force. The Task Force recommended that the process be improved by allowing submission of textbooks for review by individual year level for individual subjects where appropriate. In case their textbooks fail to make their way to the Recommended Textbook List, this measure could help reduce the publishers' loss since they normally invest in the development of textbooks by Key Stage. Submitting textbooks for review by year level will not only lessen publishers' risk, but also lower the entry barrier to the textbook market, thus encouraging small and medium publishers to enter this market.

3.19 The Task Force recommended that the review process be improved as follows:

- Retain the existing timetable of quarterly submission. Allow publishers to submit the textbooks for a particular Key Stage for review in batches (by year level) within 12 months after a new curriculum is finalised.
- Make sure that publishers will receive feedback on textbook improvement within three months after the submission of textbooks. However, the review results will be made based on the examination of textbooks for a Key Stage as a whole so as to effectively facilitate teachers in selecting appropriate textbooks.
- As "submission for review by year level" may not be appropriate for every subject, such a measure will only be implemented on a trial basis for suitable subjects.

3.20 Under the existing system, the non-EDB reviewers undertaking textbook reviews should not disclose their identity to anyone other than their employers. As the reviewers will be given information on the publishers and textbook writers in the course of the review, they may be influenced by certain preconceptions, leading to biased review results.

3.21 The Task Force recommended the use of a “double-blind” system, i.e. non-EDB external reviewers will not be given the names and information on the publishers or writers of the textbooks being reviewed. The Task Force believes that the revised review system will enhance the objectivity and impartiality of the exercise.

C. Enhancing the Transparency of the Information in the Recommended Textbook List

3.22 Previous Recommended Textbook Lists provided information on the title, edition, price and weight of respective textbooks. To further enhance transparency and provide consumers with more information on whether the learning and teaching materials are value for money, three additional items of information have been included in this year’s Recommended Textbook List:

- a comparison of the prices of individual textbooks for the current school year against those of the previous school year;
- separate lists for those textbooks with debundled prices and those without such provisions; and
- hyperlinks to the web-based learning and teaching materials developed by the Curriculum Development Institute.

3.23 To further enhance transparency, the Task Force expressed the view that more information can be provided in the Recommended Textbook List for schools’ reference in the selection of textbooks.

3.24 The Task Force recommended that comparisons and changes of textbook prices be included in the Recommended Textbook List in formats appropriate for respective subjects and according to different criteria, such as the total price of textbooks for each Key Stage or year level. Information on the changes of textbook prices in different years and the total number of pages of each textbook etc. can also be provided to help teachers compare textbook prices and to enable parents to know about the changes of textbook prices as well as whether the textbooks selected by schools are value for money.

3.25 To ensure the selection of quality textbooks by schools, the EDB has set up a rigorous textbook review system. Textbooks submitted to the EDB by textbook publishers for review should be of approved quality before they are included in the EDB's Recommended Textbook List for schools' reference.

3.26 The Task Force was of the view that commentaries on textbooks can be included in the Recommended Textbook List to enhance transparency and to provide more information to facilitate schools' selection of textbooks. The commentaries will cover those areas of a textbook which score relatively good ratings on the following core criteria¹ in the textbook review:

- Compatibility with the aims/ learning targets/ objectives/ guiding principles laid down in the curriculum guide/ syllabus
- Coverage of the core elements of the curriculum guide/ syllabus
- Accuracy, clarity and relevancy of information and data/ concepts
- Appropriate and logical organisation of content/ sequencing of concepts
- Inclusion of learning activities essential to achieving the learning targets
- Accuracy of language used

3.27 In line with the principle of school-based management, teachers are entrusted to exercise their professional judgement and select textbooks and learning materials that they deem most suitable for their students. At present, schools should set up textbook committees to draw up a set of criteria for selecting textbooks for use by students prior to the selection exercise by making reference to the principles and guidelines set out in the circular memorandum on Notes on Selection of Textbooks and Learning Materials for Use in Schools issued annually by the EDB, with the individual School Management Committee/ Incorporated Management Committee assuming a monitoring role. Teachers are also encouraged to select quality textbooks by making reference to a set of Guiding Principles for Quality Textbooks compiled by the EDB.

3.28 The Task Force's recommendations are summarised at **Annex 2**.

¹ There are currently 39 review criteria in the Textbook Review Report, of which six constitute the core criteria for quality textbooks. If the rating against any one of the core criteria is "unsatisfactory" or below, the textbook concerned will not be included in the Recommended Textbook List.

Chapter 4 Conclusion – The Way Forward and Implementation Timetable

4.1 The Task Force, under its terms of reference and during its term of office, reviewed and examined the issues in connection with the debundling policy and put forward in this report specific recommendations which will serve as reference for the EDB in formulating relevant strategies and measures to improve the provision of textbooks and other forms of learning and teaching materials, the textbook review system, as well as the Recommended Textbook List. It is hoped that the EDB will implement relevant measures to improve the textbook review system and the Recommended Textbook List in the next round of textbook submission or in the next school year when teachers will need to select textbooks.

4.2 In response to the recommendations made by the Task Force, the EDB should formulate corresponding follow-up measures:

- (i) To facilitate the development of the e-textbook market, the EDB should:
 - enhance the IT skills of teachers by providing them with more support in using e-textbooks in teaching in order to cater for students' abilities and needs;
 - examine existing facilities and ensure that schools' and students' hardware can meet the needs of the development of e-textbooks; and
 - maintain close communication with parents, schools and professional parties so as to better understand their views and expectations on the development of e-textbooks.
- (ii) For printed textbooks, as the textbook publishers have not yet implemented the policy of debundling all textbooks and teaching materials for pricing and sale in response to the EDB's request, and schools are not allowed to accept complimentary teaching materials provided by the textbook publishers, the EDB should take timely follow-up actions to address the difficulties encountered by schools and teachers in teaching and to meet their actual needs.

Task Force to Review Learning and Teaching Materials
Terms of Reference and Membership List

Terms of Reference

To review and examine issues arising from the policy of debundling textbooks and learning/teaching materials for pricing, in particular the operation of the Recommended Textbook List as well as other measures concerning the supply of learning and teaching materials with a view to ensuring the provision of quality and value for money materials.

Members

Chairman

Mr Kenneth CHEN Wei-on, JP Under Secretary for Education

Non-official members

Professor CHUNG Yue-ping, JP (former Dean of the Faculty of Education of the Chinese University of Hong Kong)

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Secretary

Ms Sarah NGAI Kwok-chun Staff Officer, SED's office

Summary of the Task Force's Recommendations

Recommendation 1

The Government should create a conducive environment and provide incentives and assistance to attract new entrants such as relevant organisations/ professionals to the market so as to develop quality and reasonably-priced e-textbooks. The development of e-textbooks should be promoted in order to introduce competition for the purpose of regulating the distorted textbook market as well as to provide users with greater choice of effective learning/teaching resources.

Recommendation 2

While the existing core criteria for reviewing textbooks should be retained, new criteria, such as whether the contents of a textbook are comprehensive enough and suitable for independent use, or whether its organisation and design facilitates recycling, should be added to meet the latest developments.

Recommendation 3

The existing timetable of quarterly submission of textbooks for review should be continued. Further, publishers should be allowed to submit textbooks for a Key Stage (i.e. a three-year block) in batches (i.e. by year level) on a trial basis for subjects deemed appropriate, so as to lessen publishers' risk and lower the entry barrier to the textbook market.

Recommendation 4

The "double-blind" system should be used in conducting textbook reviews. That is, non-EDB external reviewers will not be given information on the publishers or writers of the textbooks being reviewed to enhance the objectivity and impartiality of the exercise.

Recommendation 5

Information such as comparisons and changes of textbook prices should be included in the Recommended Textbook List for reference by schools in the selection of textbooks. The information will also enable parents to know about the changes of textbook prices.

Recommendation 6

Commentaries on textbooks should be included in the Recommended Textbook List to provide more information and enhance transparency so as to facilitate schools' selection of textbooks. The commentaries will cover those areas of a textbook which score relatively good ratings on the core criteria in the textbook review.