## PRIMARY EDUCATION SUPPORT PROGRAMME (PESP) TANZANIA

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1. SUMMARY

a) Overall, this has been a successfully managed programme with positive outcomes. On the evidence available, all publishers and Jambo Plastics have performed professionally and competently in adhering to the time frames and the specific details of their contracts to which they committed. In total, over 18.5 million books and 886,724 teacher’s guides were procured at an average cost of Tanzanian Shillings 2,717 (USD 1.68/£1.07) per title delivered to the primary schools. A further 11,302 desks were also procured. A second procurement of desks is scheduled at a cost of Tshs 5,971,927,966.80 (£2.14 M).

b) Textbook programmes are notoriously difficult to manage and rarely run smoothly due to the number of unexpected or unanticipated hitches, all the more so when textbooks and desks are being manufactured offshore and subject to factors beyond the immediate control of the suppliers. For a primary textbook procurement of this scale and magnitude, and being a first for the Government of Tanzania, a timeframe of 12-15 months from the signing of the MOU through to delivery, with the expectation there would be slippage to this time frame, would have been realistic. In the circumstances, the anticipated time frame of 6 months was unrealistic.

c) The provisions of the Government of Tanzania Public Procurement Legislation required the selected textbooks to go out to restricted tender. The bidders had to be allowed reasonable time, usually 30 days, in which to prepare (eg. confirm prices with their overseas printers, ensure adequate stocks of paper would be available, shipping times, etc) and submit their bids. In this instance, the submitted prices from the publishers were then subject to negotiation between the Government of Tanzania and each of the publishers. This was a protracted process.

d) It is extremely unlikely that such a positive outcome would have been achieved had a specialist procurement organisation, in the form of Crown Agents, not been retained by DFID to support Prie Minister’s Office-Regional Administration and Local Government (PMO-RALG). The Crown Agents contributed their expertise to the procurement process and did much of the trouble shooting/problem solving. In the latter category, the poor quality of the data collected by the PMO-RALG’s Education Management Information System (data system) became a significant issue and lead to further delays.

e) Within Sub-Saharan Africa, the weather can materially affect access and delivery to remote areas, where the road infrastructures are frequently poor. Tanzania is no exception in that the arrival of the textbooks to parts of the country had to be scheduled to avoid the rainy season. Otherwise delays of up to four months, while waiting for routes to become accessible, could have adversely affected delivery timeframes (as they did for Jadida publishers).

f) The quality of production, as set by the tender specifications, has ensured that the schools received textbooks that meet or exceed the minimum standards recommended by the World Bank for their book programmes. There have been complaints about the quality of the content and lack of curriculum alignment of some of the titles. All the titles supplied under this project had previously been certified by the Education Materials Approved Committee (EMAC) for use in Government of Tanzania primary schools. The number of complaints led to Parliament demanding the EMAC committee be disbanded in 2013.
g) The plastic desks supplied by Jambo are of sturdy construction and adjustable for height. The desk top may be sloped to assist writing, reading, etc. Given the climate of Tanzania, there will be reservations about how long the wood laminate/metal desks being supplied under PESP will last. The wood/metal desks are not adjustable. (Annex 1 has photographs of the desks.) The Director of Education, PMO-RALG recognises that some Districts have failed to adhere to the instructions given to the District Education Offices (DEOs) (i.e. that desks should be given to a strictly limited number of schools in each District) ideally those in most need. A better outcome would have been achieved if Jambo Plastics had been contracted to deliver to selected named schools with the benefit of hindsight, it may have been preferable to supply plastic desks in the districts.

h) The monitoring aspects of the procurement were undertaken by PricewaterhouseCoopers (PWC) and DataVision International. PWC, hired by the Tanzanian audit authority, have been responsible for overseeing the expenditure of the BAE/Radar funds. DFID involved DataVision International to build a website to specifically monitor the physical distribution of the textbooks to the schools. The website can be accessed at: http://pesptz.org/index.php/home?lang=english. In its first year of operation the website had over 58,000 unique views. The existence of the website, and the publicity it has received through the media, will have contributed to deterring publishers and local officials from inappropriate behaviour.
2. INTRODUCTION

2.1 The consultant was requested to undertake a study of the procurement and distribution approaches used in implementing PESP while still delivering Value for Money for both the Tanzanian and United Kingdom Governments. The study was carried out between 12 – 20 November, 2014.

2.2 The Government of Tanzania received GBP29.5 million for the procurement of primary school textbooks and desks through the Primary Education Support Programme (PESP). This money was the proceeds of a settlement between BAE Systems and the United Kingdom’s Serious Fraud Office in relation to the activities of BAE Systems plc in Tanzania.

2.3 DFID’s role was directed by the bilateral government Memorandum of Understanding (MOU) to support the programme with procurement, audit and monitoring advice. DFID also added some additional funds to give added strength to the monitoring services (the Tanzanian audit authority hired PWC to monitor financial expenditure). Some additional finance to complete the final Aidan book procurement in 2014 was added by the GoT.

2.4 The procurement of the text books and teacher guides was managed by the PMO-RALG, with external support from Crown Agents. The latter were retained by DFID to give added support to the procurement processes.

2.5 The project sought to provide primary school textbooks to the value of GBP24.5 million to approximately 16,000 primary schools in mainland Tanzania and school desks, to the value of GBP5 million.

2.6 In total over 18.5 million books and 886,724 teacher’s guides were procured at an average cost of Tanzanian Shillings 2,717 (USD 1.68/£1.07) per title delivered to the primary schools. The RADAR/BaE procurement and distribution was apparently the first nationally organised distribution of textbooks to GoT public primary schools.

2.7 Delivery of most of the books to individual schools took place late in the calendar year 2013 so that the books could be used in the academic year commencing in January 2014. Some of Jadida Publishers deliveries were delayed by effects of the rainy season, consequently they did not complete until June 2014. For contractual reasons, the contract with Aidan Publishers was delayed until mid-2014, consequently distribution of their textbooks is due to be completed late 2014. As of 17 November, Aidan Publishers have completed 81.5% of their school deliveries.

2.8 Originally it was proposed to limit the supply of desks to a smaller number of schools in areas where school desks were in great need; however, this decision was subsequently changed following parliamentary pressure so that all districts each received some desks. PMO-RALG issued instructions
to DEOs to allocate the desks to one or two schools (those in most need) within their district. Unfortunately, not all DEOs adhered to this instruction.

2.9 Procurement and distribution of the desks was completed by Jambo Plastics by 31 October 2014 after their contract had been delayed due to (i) Tanzanian MP’s wish for the distribution of the desks across all of the Local Government Authorities (LGAs) of Tanzania as opposed to nine LGAs with acute need originally proposed in the MoU, (ii) bureaucracy of the procurement law.

2.10 Ideally, a (Primary) Textbook Procurement/Distribution Programme might look to contain the following components:

- Project/Programme design
- Procurement
- Distribution
- Communications policy/strategy (partially covered)
- Sensitisation/training in school level management on the use, storage, etc of the textbooks (not covered)
- Monitoring
- Identification of unplanned for beneficial (and, if appropriate, negative) by-products of the programme
3. PROGRAMME DESIGN

3.1 The circumstances surrounding the objectives and subsequently the initial design of this textbook procurement/distribution was somewhat unusual in that it was funded as a result of a settlement between BAE Sytems plc by the United Kingdom Government’s Serious Fraud Office (SFO) in relation to the activities of BAE Systems plc in Tanzania. As a result there were several parties who were signatories to the MOU (GoT, SFO, BAE Systems plc and DFID) and involved in the overall design of the programme (MoEVT, PMO-RALG, CAG, DFID) each with a differing set of expectations. To arrive at a workable solution acceptable to all parties inevitably delayed the project’s move to implementation.

3.2 A common failing in the design of many textbook programmes is a lack of knowledge within the “design team” of the detail surrounding textbook publishing, distribution and the potential challenges. For this programme, the services of a consultant were obtained; however, the terms of reference are not known. Of the textbook procurements the author has been involved with in Kenya, Malawi, Uganda, Liberia and South Sudan, programmes encountered challenges to a greater or lesser extent over (a) whether all schools have adequate secure book stores (b) whether guidance on the use of the textbooks, teacher guides, etc was required. The result in most programmes was that the decision was taken to either hope for the best (eg Liberia, Malawi); or some form of emergency/post-procurement provision had to be made (eg Uganda, Kenya, South Sudan).

3.3 Lastly, decisions which one might anticipate to be arrived at within one month may, regrettably, take up to circa three months (or longer) in a developing country.
4. PROCUREMENT

4.1 Annex 3 contains an outline of procurement strategies or choices, many of which would not be appropriate for PESP, largely due to the need to implement quickly. Prior to the involvement of Crown Agents (CA), the decision had been taken by MoEVT on which textbooks to procure. The textbooks selected had previously been evaluated by EMAC and approved for use in the public schools of Tanzania and certified as delivering the current curriculum, despite there being complaints and reservations over the content of some titles; a view that the approval evaluation percent used by EMAC was not high enough; and, of the curriculum alignment of some texts. The Ministry having decided that textbooks, which already existed in the market (ie. were available through bookshops and other channels) effectively meant that the only procurement method was to opt for a restricted tender to the publishers specific to the textbooks to be procured and based upon the quantities to be procured. This is considered a centralised procurement – the government collects the data, selects the titles to be procured and selects the method of distribution.

4.2 The next decision would have been whether (a) to require the publishers to distribute to the schools or (b) to have the publishers deliver to a central warehouse and for PMO-RLG to tender for a logistics company to provide a pick n’ pack consolidation by school service, with the logistics company delivering to all schools. Option (b) is appropriate in a country where the infrastructure is weak and the capacity of the book industry is inadequate. It would almost certainly be much slower and may well have been more costly. For Tanzania, option (a) with established publishers, an existing countrywide network of booksellers known to the publishers, with whom the publishers were prepared to work – not always a given – was the logical choice. A further factor in favour of the publishers was that many of them were able to obtain the cooperation of their printers and have the latter load the sea containers with the quantities of books required for each District, so that when the containers cleared the docks in Dar es Salaam, they could in theory move straight to the District for handing over to the local bookselling ‘partner’. The co-operation of the printers in the manner described will have realised significant time and cost savings. Using the local booksellers, with their knowledge of the location of schools, their communities and any route issues (eg broken/washed away bridges/ culverts) would have been more cost effective than if the publisher tried to make alternative delivery arrangements.

4.3 Once it had been agreed how the procurement would proceed, the next step would have been to issue an Invitation to Bid to those publishers whose books had been selected.

4.4 The issuing of tenders was substantially delayed as the Crown Agents found

   a) MoEVT/PMO-RLG data system was found to be of a poor quality and to be poorly managed. It had incomplete information on the enrolments at the country’s public primary schools and there were duplications. This necessitated an information gathering exercise involving Regional Education Directors and District Education Officers feeding data back to Crown Agents in Dar es Salaam. In Dar es Salaam the data for 16,000 primary schools had to be manually entered on to a spreadsheet to create a database. This was a time consuming activity. Once the database had been created, it was possible to verify the total number of schools to be supplied, the enrolment for each school to be supplied.
school and, finally, calculate the number of textbooks to be procured before the tenders could be issued to the individual publishers. In the event the 2012 enrolment data was out of date and no contingency for a growth in pupil numbers had been factored in, so that when the books were physically delivered for the 2014 school year there were shortages in those schools with expanding enrolments.

b) Following judgements found against Oxford University Press and, initially, Aidan Macmillan by the World Bank, it was necessary to substitute all OUP titles. As Aidan Publishers appealed the decision to the Supreme Court in Tanzania (which subsequently found in their favour in the summer of 2014) the substitution of their titles was set aside.

4.5 Prior to DFID/Crown Agent’s involvement, MoEVT had taken the decision to split the country’s schools into two halves, East and West. It had also been decided that the schools in the East would receive a different title in each of the four core subjects to the titles supplied to schools in the West. Schools were not offered a choice or a say in the selection of the titles they ultimately received. There is strong pedagogical evidence to support the case that the same textbook/series does not suit all schools and that school level choice is preferable. Many educationalists maintain it is better to select textbooks by series on the grounds this approach offers consistency of authorship/writing style and editorial input. The selection of titles by grade, per subject lack these consistencies.

4.6 The average delivered cost of Tanzanian Shillings 2,717 (USD 1.68/£1.07) represents good value for money, bearing in mind that 13% of the cost would have been for distribution to schools within Tanzania. In addition, the publishers would have had to meet the cost of printing the textbooks, and pay for the cost of other disbursements (eg. delays in containers being cleared leading to demurrage costs) and other overheads. In South Sudan, where the Ministry of Education, Science & Technology is currently undertaking a similar textbook distribution but also owns the publishing rights to their current textbooks, the average delivered cost of a book is £0.69 (USD 1.07). The delivery component represented 46% of the average cost of a book and is indicative of the challenge created by an inadequate road network which only functions in the dry season. In Zimbabwe, during 2011, the Education Transition Fund (2) provided a textbook distribution to primary schools. The average delivered cost of a book was $1 (£0.65). In Rwanda, where DFID have been supporting the Government of Rwanda with the provision of primary textbooks, the average delivered cost of a book - includes textbooks and supplementary readers - is £2.43 (USD 3.77). Distribution is being undertaken by individual publishers. Actual distribution costs are not known, but have been estimated to be in the range of 15%-20%.
5. DISTRIBUTION

5.1 The respective publishers were responsible for delivering down to the individual schools. Whereas, Jambo Plastics were contracted to supply the desks to the Districts. In the event it has been alleged some DEOs had not prepared for the arrival of the desks (ie no arrangements were in hand for the desks to be immediately delivered or stored in a dry location). PMO-RLG maintain all Districts were given written instructions advising how the desks were to be allocated. In the event, when Jambo had finished unloading and assembling at some Districts, large quantities of desks were left in the open. DFID had requested a school specific list of which schools the desks had been allocated; to date this list had not been forthcoming.

5.2 Tanzania Institute of Education (TIE) were contracted to deliver to the District Education Offices, with the DEO responsible for delivery of the Syllabi to schools. Given that schools can be 100 kms or more from the District HQ, TIE’s distribution plans would have benefitted from “thinking outside the box” to ensure their publications (syllabi and syllabi guides) were certain of reaching schools.

5.3 With minor differences, the approach employed by publishers was to transport the textbooks in containers to each district from Dar es Salaam port. The containers were packed at the off-shore printers. Depending upon the size of the District, number of schools and the publisher some Districts received up to five containers from a single publisher. At the District, the containers were handed over to the local bookselling companies contracted to deliver the textbooks to the schools in the District. A warehouse was hired by the publisher in each District for use by the bookseller(s) for a pick n’ pack operation. This process entailed picking the textbooks by school, according to the data provided by the publisher, and packing the books into cartons. The publishers usually provided all the documentation, including delivery notes, to be signed and stamped by the school administration. As the various publishers were printing off-shore and could not be sure when their respective books would arrive, they considered it impractical to cooperate over deliveries.

5.4 Jambo Plastics have a number of depots covering the whole of Tanzania. Each depot has a delivery area of 200 kms in circumference from the depot. The desks were transported from Dar es Salaam to the depots by a logistics company; from there the depot, using their own vehicles, transported the desks to the Districts. The plastic desks, manufactured at Jambo’s facility in Dar es Salaam were assembled in the factory and moved already assembled. The wood/steel frame desks, imported from China, were assembled on site at the District HQs by Jambo’s own staff moving in teams from Dar es Salaam to the Districts. (See Annex 1 for more photographs of the desk types courtesy of Jambo Plastics.)
6. COMMUNICATIONS STRATEGY

6.1 In the current environment in which DFID and beneficiary governments now operate, most textbook distribution projects merit a focused Communications Strategy and Policy. Ideally the management of a Communications Strategy could be the responsibility of advising PMO-RALG (in this instance Crown Agents) or be the subject of a separate DFID contract. The Communications Strategy should be handled by an experienced media person. An effective communications policy can be one more tool in the armoury to discourage inappropriate behaviour.

6.2 The Communications Strategy is likely to extend to:

- Building relationships with the media (press, radio, magazines, TV)
- Issuing press releases, including photo opportunities, as the programme progresses to inform all stakeholders (including parliamentarians), donors, INGOs, NGOs and decision makers
- Targeting and informing all levels of education officers, teachers, parents, local government officers on the programme, what books/desks they will be receiving, etc
- Issuing guidance to parents on how they may assist their children to use, care for and protect the textbooks
- Who the suppliers/publishers will be and how they were selected
- Which subjects and pupil/textbook ratios the books are being supplied

6.3 The above list is indicative and not necessarily comprehensive. The purpose of a communications policy would have been to reinforce the messages conveyed by PMO-RALG, to assist in keeping all stakeholders informed, to minimise the risk of books being diverted and endeavour to keep the procurement activities updated via the media.

6.4 It is my understanding that PMO-RALG was responsible for Communications which, effectively extended to communicating with the Districts. Not all DEOs and head teachers were apparently informed or had not taken on board that they would be receiving textbooks or desks. Information was received in the course of the study indicates that not all Head teachers were advised to be available at weekends to receive and sign for their consignments of textbooks. The lack of information has apparently led some schools to question whether the textbooks are genuine, fakes, etc. On the other hand, some
suppliers have not been able to get the school stamp on their delivery documentation, necessitating sometimes long return journeys to get the paperwork stamped. Without the stamp, PMO-RALG are refusing to pay supplier invoices.

6.5 Some districts were not prepared for the arrival of the desks. This has resulted in districts storing dozens of the wooden desks in the open as they claim to have nowhere to store them (see attached photographs). The laminate used on the desks is unlikely to withstand prolonged rain; providing the desks are moved to schools quickly, no long term damage should be done. PMO-RALG has been made aware of this observation and agreed it is unsatisfactory.
7. SENSITISATION/TRAINING IN SCHOOL LEVEL MANAGEMENT OF TEXTBOOKS

7.1 An aspect nearly always overlooked or treated as an afterthought is the topic of book storage and what happens to the books when they reach the schools. Do all schools have adequate, secure store rooms? What happens to the books on arrival at the schools should be an integral part of the textbook distribution programme planning.

7.2 Many urban and peri-urban schools may have a lockable storeroom; however, this is often not the case in rural schools. Publishers on this distribution have confirmed that in rural areas the textbooks are being kept in a teacher’s or the head teacher’s house as there is no secure room/facility at the school. Indeed many rural schools in Tanzania are of a basic construction, having an opening for a window(s) and door space, but no shutters or door. There is often no secure cupboard, room or store. [When Kenya introduced decentralised textbook procurement in the mid-1990s, after the first year, the Ministry of Education were obliged to release a capital sum of money to every primary school to be used solely for the provision of secure storage facility for the textbooks. While many schools had a storeroom, it was unsuitable for the storage of textbooks (eg lacked shelving). Schools spent the money in the way that best suited their needs.]

7.3 In the harsh conditions of parts of Tanzania, textbooks will not survive anything like their projected life unless there is a programme informing District Officers, Head Teachers, Teachers and parents on the management of textbooks. Suggested topics might be:

- How to handle a textbook (never touch with dirty or wet hands)
- The proper way to open a textbook
- The storage of textbooks
- How to cover the outside of a textbook (plastic is preferable)
- Always carry textbooks in a satchel; a plastic bag is better than nothing
- Keeping the shelves in the storeroom clean
- Do not keep garden implements or food in the same storeroom as the books
- Register or record all textbooks in a counter book
- If pupils are allowed to take textbooks home, record in the register and get them (or the parent) to sign for the book(s)
- How to do simple repairs to make the books last longer
- Etc....

7.4 All the above are common sense and obvious best practice; however, experience has shown that best practice can rarely be taken as a given in Sub-Saharan Africa.
8. **MONITORING**

8.1 This is another aspect of textbook distributions which is under-valued and frequently under resourced. It is pleasing to record how well the various initiatives taken by DFID and DataVision have fallen into place in this respect.

8.2 By all accounts the PESP website (http://pesptz.org/index.php/home?lang=english) maintained by DataVision has been extremely useful in keeping decision makers informed and has been used by the press as a regular source of information. Google analytics provided by DataVision, November 2014, indicates that in excess of 58,000 unique views have been made to the website in the first year. The website also has a feedback facility enabling people to leave comments; a forum page; separate pages on the monitoring of deliveries of the textbooks and the desks; and, general information about PESP.

8.3 Staff from DataVision will shortly be embarking on external visits to a small sample of schools as part of their monitoring. Aspects they will be looking into include:

- Checking to see if the school has received their textbooks
- Count the textbooks to see if they match the delivery note(s)
- Whether the textbooks have been used on delivery
- The school’s and pupils’ perceptions on the quality of the textbooks
- Speak to pupils and establish whether they are being allowed to take any of the books home
- If the above applies, how are the school accounting for the textbooks

- Do parents know which and how many textbooks have been delivered?

The PESP website, which was developed by Tanzanian company Datavision, was launched by Zuberi Samataba, Deputy Permanent Secretary of the Prime Minister’s Office Regional Administration & Local Government.

He stressed the important role the textbooks can have in improving primary education and how due process has been followed with DFID support. This has also allowed competitive prices to be achieved and improved value for money.

(Photograph courtesy of Insight News)
9. IDENTIFICATION OF UNPLANNED FOR BENEFITS

9.1 In the course of undertaking this study, a number of unexpected and unplanned potential benefits materialised, which would be for the ultimate benefit of the Government of Tanzania and the management of the country’s educational system.

a) For Tanzanian publishers, a distribution of this scale and magnitude was a new experience and presented a steep learning curve. In the process they have learnt much, which will lead to cost effective textbook supply going forward. (Assuming the GoT gives them a chance).

b) The publishers have gained and collated a tremendous amount of management information on the location of public schools in Tanzania, school enrolments and other useful data.

c) The publishers used established booksellers to undertake the distribution at District level; suggesting that the country has the basis for an effective distribution system for ensuring textbooks reach schools in a timely and efficient manner. (NB: Textbook distributions invariably must be down to school level for Value for Money to be achieved – delivery to district level rarely has a good outcome – Sub-Saharan Africa is littered with examples of where textbooks never reached the schools for which they were intended.)

d) In future distributions, given the opportunity, some publishers will record the GPS co-ordinates for each of the schools (at least that would be their target), effectively mapping the location of schools. The author has no information as to whether PMO-RALG possesses the GPS co-ordinates for all their primary schools. If the quality of the EMIS database is an indicator, then PMO-RALG may well not have complete information on the location of the country’s primary schools. If handled judiciously and tactfully, there may be scope for cooperation, but would only be likely to be of interest if PMO-RALG decided to work with publishers.

e) The distribution exposed the weaknesses in the EMAC method of evaluating the content of textbooks, especially whether the content delivered the curriculum or in identifying obvious typographical errors. Using the weaknesses in the structure and past performance of EMAC to justify the country adopting a ‘1 book’ policy is not credible.

f) The early stages of this programme highlighted the shortcomings in the management, the content and accuracy of the data in the data system. It is outside the scope of this report to dwell on the issues, suffice to say, in the experience of the consultant, the information collected by many data systems proved to be unreliable. This can be due to over complication, too long questionnaires (one recent example extended to 35 pages) or manipulation of the data provided where it is perceived to be to the advantage or disadvantage of the school.

9.2 Many of the benefits identified above may wither on the vine; certainly they will not be developed, if GoT maintains its current direction of travel, whereby TIE becomes the sole author and initiator of primary and secondary textbooks. It is also apparently being proposed to have only one textbook per subject in public schools. This policy, if it becomes a reality, lays the GoT open to pedagogical challenges. The book industry in Tanzania has little confidence GoT is in a position to or will be able to finance such a
policy, nor do they believe TIE has the resources or expertise. In the short term publishers are likely to think long and hard before investing in the development of new textbooks – primary or secondary. If the Government decide to by-pass educational publishers, it will do immense long term damage to the growing educational publishing industry in Tanzania.

9.3 Jambo Plastics have prepared a Powerpoint presentation, which their project teams will be taking with them as they visit schools. The purpose of the presentation is to help teachers make the best use possible of the new desks, highlighting their flexibility and health benefits. They will also be monitoring how and by whom the desks are being used.

9.4 On the evidence available during this study, the plastic desks being supplied to primary schools represent better Value for Money than either of the wood/metal or traditional bench desks. Given the lower cost of the plastic desks, if only plastic desks had been supplied, an additional 10,652 desks would have been available for distribution to primary schools: sufficient to have benefited up to possibly an additional 200 schools. Broken parts are replaceable. When the desks come to the end of their useful life, the plastic desks have the advantage of being recyclable; given that Jambo Plastics have depots across Tanzania, this may not be as farfetched an idea as it might appear. Jambo would use the recycled plastic to make some of their other products.
ANNEX 1

Desks in use at schools in Morogoro District
ANNEX 2

PESP Data

A.1 The data used in the MoU between the constituent parties to PESP was broad brush and did not appear to reflect the many nuances for planning a textbook procurement. The appendices at Annex A of the MoU indicates the total deficit in books for each subject in each region; however the total deficit is of limited benefit when planning to procure textbooks for each grade in each subject.

A.2 The quantities of each title ordered from the publishers indicate that enrolment numbers held up through Grades 1–4, but decrease through Grades 5–7.

A.3 In order to arrive at credible figures upon which to calculate the final textbook requirements, the Crown Agents had to verify with PMO-RALG all the various data components and re-calculate all the data. This will have extended to confirming:

a. Names of all schools in each District within each Region
b. The location of each school
c. The enrolment, by Grade for each school
d. The current number of textbooks, by subject, by grade currently owned by each school
e. Calculate the textbook deficit in each subject by grade; from this information calculate the number of textbooks in each grade, for each subject it would be necessary to order to achieve PMO-RALG’s target pupil/textbook ratio in each subject and grade for each of the circa 16,000 primary schools.

A.4 The above exercise demonstrated the poor quality of the data systems and its poor management of the collection of data.

A.5 It is unclear whether:

I. Any allowance was made for any new schools scheduled to open and that would be operational by the time of the distribution

II. Whether any allowance was made for year on year anticipated enrolment growth, possibly as a result of GoT/PMO-RALG initiatives? [NB: Evidence from other countries in the East African Region indicates that the provision of quality textbooks to public primary schools is more likely to encourage parents to send their children to school.

III. Any allowance for the BAE/Radar textbook distribution, being apparently the first nationally organised distribution of textbooks to public primary schools undertaken by the GoT/PMO-RALG leading to a boost to enrolment numbers. A national distribution of textbooks invariably has a positive effect on enrolments.

A.6 Any unplanned for increase in enrolments will have adversely impacted the target pupil: textbook ratios.
ANNEX 3

Procurement options

A.1 The most appropriate method of procurement of textbooks for a national textbook distribution will reflect a number of considerations, eg:

a. Are already commercially published titles to be procured?

b. Does the Ministry of Education own the “publishing rights” to the titles to be procured?

c. Are the textbooks to be procured the result of a competitive bidding and evaluation process?

d. Is the procurement to be centralised or decentralised – in part or wholly?

e. Have the textbooks to be procured been selected in an open and transparent method?

A.2 For DFID funded textbook procurements there are many advantages to contracting the management of the procurement processes to a specialist procurement agent. If necessary, the agent can assist with drawing up the implementation plan, manage the disbursement of funds at arm’s length to the government, manage the processes in conjunction with the MoE, bring in specialist consultants as and when necessary and above all, trouble shoot and problem solve to keep the programme/project on track and within schedule.

A.3 The notes which follow are not necessarily comprehensive, but are intended to give an indication of what each approach may entail. Local legal and government requirements may also have a bearing on the most suitable approach.

1. Procurement of commercially published titles

i) Procurement options are limited where textbooks produced by commercial publishers are selected. The “publishing rights” will be the property of the respective publishers. It would normally be expected that the Government would have selected a core number of titles, on the basis of published evaluation criteria, two/three, up to a maximum of six titles per subject, per grade which can only be procured using Government capitation funds. The government may have approved other titles for use in schools, but it is likely these textbooks may not be purchased using government funds.

ii) Where governments allow school level choice of the textbooks, schools will normally be notified of the total capitation allowance (on a per pupil basis) available for the purchase of teaching materials. Schools will also receive a printed order form of the approved titles and the current price. The schools compile their textbook order from the restricted list of ‘approved titles for use in public primary schools’ and submit to the MoE (PMU). The latter consolidate the school orders from all the primary schools to establish the total number of copies of each title to be ordered from the appropriate publishers.

iii) Governments will usually contract directly with publishers of the textbooks to be procured. The publishers may be contracted to undertake the distribution down to school level. Alternatively, the government may elect to undertake the distribution as a separate tender. Distribution by the publishers is likely to be more efficient and quicker as they will often partner with local booksellers. The latter will undertake the delivery to the schools and being relatively local should be better placed to remedy any supply issues. It is important that any distribution is down to school level. Distribution, which stops
at the District level is invariably unsatisfactory as the districts are unlikely to possess the manpower, financial resources, transportation or management expertise to deliver to each of the schools.

2. Government (MoE) owns the publishing rights

i) Where the government owns the publishing rights to the textbooks used in the country’s public primary schools, then the procurement effectively is restricted to the printing and distribution of the textbooks. Few governments of countries in the developing world have the requisite expertise to undertake such procurement. The services of a consultant(s) or procurement agent with knowledge of the print industry, book production/manufacturing standards and in textbook distribution down to school level would be essential.

ii) Prior to going to tender, the production/book specifications need to be drafted as they will constitute a key component of the tender for print services and would normally be drafted by the consultants in conjunction with the Ministry. Despite the emotional desire to have the textbooks printed locally or in the region, the procurement for the print services should be awarded on the basis of an international tender to ensure the best prices are obtained and that the production specifications will be met and delivered. Quality book production standards are essential if the textbooks are to last the four/five years most projects anticipate.

iii) Whether the print contract is awarded to a local or an overseas printer, provision should be made for recruiting an independent book production consultant, on a short term basis, in the country where the textbooks are to be printed. The book production consultant will be required to regularly monitor the quality of the textbooks as they come off the manufacturing line to ensure the textbooks meet the contractual production specifications.

iv) The distribution of the textbooks to schools will necessitate contracting the pick n’ pack of the textbooks into individual school deliveries. One approach would be to contract a logistics company with adequate warehouse facilities and mechanical handling equipment for off-loading full containers and moving pallets of textbooks. The logistics company may also have the transport resources to distribute to each of the schools. Regional or local booksellers may have a role to play in the distribution at the local level.

3. New textbooks involving competitive tendering and evaluation

i) Perhaps following a major review or re-writing of the primary curriculum the MoE finds the available textbooks no longer deliver the new curriculum. Faced with this situation, one approach is to invite commercial publishers, by means of an international tender, to submit outline proposals for textbook series that will deliver the new curriculum. The publishers will be required to find the authors, editors, illustrators, book designers, layout specialists, etc. The tender will detail content specifications and production specifications (eg weight of card to be used for the cover; paper weight; amount of colour content; book size; syllabi; relevance to the curriculum; content is age/grade relevant; etc).
ii) Bidders, whose submissions pass the technical evaluation stage, then go on to the content evaluation stage. The content evaluation is usually carried out by subject specialists scoring each submission independently against a pre-agreed (and pre-announced) set of criteria. Titles scoring below a certain level (of points) are rejected. The titles adopted for use in schools will be the best scoring two, three, four (up to, in exceptional circumstances, say six) titles per grade, per subject. Often titles which exceed the minimum requirement will be authorised for use in schools, but may not be procured using project or government capitation funds.

iii) This approach to selecting titles is time consuming. A review and re-writing of the curriculum usually takes approximately three years. It takes a further three years to go through the tender and evaluation of submitted titles – publishers have to be given time for their authors to produce outline content and a further year to turn an outline into a complete textbook. Printing, production of the finished textbooks and distribution adds a further 12-15 months. The latter includes the time it takes the Ministry to establish individual school requirements to ultimately determine the number/quantity of textbooks to be procured and printed by each publisher.

iv) Using the above approach, distribution will often be undertaken by the publisher delivering direct to schools. In those countries with established booksellers, the publishers may also distribute using the latter’s retail network.

v) It should also be noted that new textbooks will normally be phased in over three or four years (ie. in year 1, books for Grades 1 and 4 might be procured; the following year books for Grades 2 and 5; and so on). Publishers and printers rarely have the capacity to produce several complete series in the same year. Equally, few school systems have the capacity to cope with new textbooks at every grade and in every subject simultaneously. There are also significant financial implications for all parties, which have to be managed; the cost implications alone would normally be too much for most Ministry budgets to withstand.

vi) The above approach has the advantage that all steps in the process are transparent, leaving reduced scope for the selection and evaluation outcomes to be manipulated.

4. Centralised or decentralised procurement

i) Under centralised procurement, all decisions on which textbooks and quantities each school will receive are taken by the Ministry. The Ministry will also be responsible for determining the method of distribution.

ii) In a partially decentralised procurement, the Ministry may notify each Head teacher of the capitation allowance to be used on the purchase of textbooks for the school. The capitation allowance being calculated on each school’s enrolment. At the same time the Ministry may issue each school with an order form listing the titles authorised for use in the country’s public primary schools and the unit price (as agreed between the Ministry and the publisher). Each school completes its order form and sends it back to the Ministry. The Ministry consolidates all the various school orders to determine the total quantity to be ordered of each title. The orders are placed with the publishers for delivery either direct to
the individual schools or to a central logistics organisation contracted to undertake the distribution to schools. The Ministry reimburses the publishers for the cost of the books procured.

iii) In a decentralised procurement, this usually entails the Ministry transferring capitation funds into each primary school’s bank account which the school operates specifically for this purpose. The account usually has several signatories, who must authorise all expenditure. Schools may only spend capitation funds on textbooks approved by the Ministry (or on other learning materials). Orders are usually placed with and supplied by local booksellers. The booksellers buy from the publishers or wholesaler booksellers.

5. Need for textbooks to be selected in a transparent manner

i) When ministries are approving textbooks for use in the country’s primary schools, the selection process has to be seen to be fair and transparent. Failure to ensure the selection criteria are publicised and that the selection process is above reproach makes it much easier for the Ministry to rebuff disenchanted publishers annoyed and frustrated that their title(s) have not met the criteria for selection. It is good policy that the reasons for rejection should be made available, upon request, to the publisher. The latter may be given the opportunity to remedy the perceived shortcomings and re-submit the title(s) for evaluation the following year (or whenever appropriate).

6. Observation

i) Although frequently overlooked when considering textbook procurement, it is highly likely that a primary textbook procurement, especially if it is the first of its kind or is taking place in a post conflict country, should consider what arrangements are in place for:

- The proper storage of the textbooks on reaching the schools
- The adequate management of the textbooks and their usage by teachers and pupils
- Ensuring teachers and teaching staff receive guidance or training on how to make the best use of the textbooks in the classroom
- A communications strategy to reach out to and inform all stakeholders on the distribution – who will benefit; who is providing the funding; which textbooks; how were they selected; etc.
The settlement between BAE Systems and the SFO amounted to £29.5m. £300k was set aside under the MoU to be used for audit: £150k to go to the Comptroller and Auditor General (CAG) for financial audit (this sum was included in the funds transferred to GoT) and £150k for procurement audit (transferred separately to DFID). DFID added to the latter funds to set up the tracking website through DataVision and provide for some monitoring costs. The programme sought to provide primary school textbooks to the value of GBP24.5 million to approximately 16,000 primary schools in mainland Tanzania and GBP5 million of school desks to a smaller number of schools in areas where school desks were in great need. The GoT added some additional finance to complete the final Aidan book procurement in mid-2014.

The procurement of the textbooks, teacher guides and desks was managed by the PMO-RALG, with external support from Crown Agents as part of the procurement audit. The procurement of the textbooks and teacher guides was based upon a restricted tender exercise to specific publishers based upon the quality of the textbooks as assessed by the Ministry of Education and Vocational Training.

Delivery of most of the books to individual schools took place late in calendar year 2013 so that the books could be used in the academic year commencing in January 2014.

Procurement of the desks was delayed due to (1) Tanzanian MP’s wish for the distribution of the desks across all of the LGAs of Tanzania as opposed to nine LGAs with acute need originally proposed in the MOU, (ii) inaccurate tender documents and challenges to the bid process. Delivery of the desks to all Districts was complete by the end of October 2014.