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STUDY OF THE SUPPLY CHAIN FOR SCHOOL BOOKS IN SENEGAL

LECTURE POUR TOUS

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Contracted under AID-OAA-I-14-00055/AID-685-TO-16-00003

Lecture Pour Tous

DISCLAIMER

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ACRONYMS

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| ADP | Agence de presse [News Agency] |
| ADPME | Agence pour le Développement des Petites et Moyennes Entreprises |
| AMC | Affaires mondiales Canada [Agency for the Development of Small and Medium Sized Companies AMC/World Affairs Canada] |
| APC | Approche par compétences [Skills-based approach] |
| ARMP | Autorité de Régulation des Marchés publics [Public Markets Regulatory Authority] |
| ASE | Association Sénégalaise des Éditeurs [Senegalese Publishers' Association] |
| BIE-UNESCO | Bureau International de l'Éducation [International Bureau of Education] |
| BLD | Bibliothèque Lecture Développement [Reading Development Library] |
| CAFED | Centre Africain de Formation et de Diffusion |
| CAMD | Commission d'Agrément du Matériel didactique [African Center for Training and Dissemination CAMD / Educational Materials Approval Commission] |
| CEAM | Commission d'Évaluation et d'Agrément de Manuels [Commission for the Evaluation and Approval of Books] |
| CEDEAO | Communauté Économique des États de l'Afrique de l'Ouest [Economic Community of West African States] |
| CFEE | Certificat de Fin d'Études élémentaires [Elementary Studies Completion Certificate] |
| CI | Cours d'Initiation [Beginners' Course] |
| CLAC | Centre de Lecture et d'Animation Culturelle (Reading and Cultural Encouragement Center) |
| CM | Cours Moyen [Intermediate Course] |
| CONFEMEN | Conférence des Ministres de l'Éducation des États et Gouvernements de la Francophonie [Francophone States and Governments Conference of Ministries of Education] |
| DAGE | Direction de l'Administration Générale et de l'Équipement [Department of General Administration and Equipment] |
| DLL | Direction du Livre et de la Lecture [Department of Books and Reading] |
| DMS | Division des Manuels scolaires [School Books Division] |
| DPRE | Direction de la Planification et de la Réforme de l'Éducation [Department of Educational Reform and Planning] |
| EENAS | Éditions des Écoles Nouvelles Africaines-Sénégal |
| ELAN | École et langues nationales en Afrique [School and National Languages in Africa] |

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| FILDAK | Foire internationale du Livre de Dakar [New African-Senegal School Publications FILDAK / Dakar International Book Show] |
| IA | Inspections d'Académie [Academy Inspections] |
| IEF | Inspections de l'Éducation et de la Formation [Education and Training Inspections] |
| MEN | Ministère de l'Éducation Nationale [National Ministry of Education] |
| NEAS | Nouvelles Éditions africaines du Sénégal [Nouvelles Éditions africaines of Senegal] |
| OIF | Organisation Internationale de la Francophonie |
| ONG | Organisation non gouvernementale [International Organization for Francophony / NGO Non-governmental organization] |
| PALME | Projet d'Amélioration de la Lecture et des Mathématiques à l'École [Reading and Mathematics School Improvement Project] |
| PAQEEB | Projet d'amélioration de la Qualité et de l'Équité de l'Éducation de base [PAQEEB / Quality and Equity in Education Improvement Project] |
| PAQUET | Programme d'Amélioration de la Qualité, de l'Équité et de la Transparence [PAQUET / Program for Improvement of Quality, Equity, and Transparency] |
| PASEC | Programme d'Analyse des Systèmes Éducatifs de la CONFEMEN [PASEC / CONFEMEN Program for the Analysis of Educational Systems] |
| PDEF | Programme Décennal de l'Éducation et de la Formation [PDEF / Ten-year Program for Education and Training] |
| PME | Petite et Moyenne Entreprise [PME / Small and Medium Sized Companies] |
| PPO | Pédagogie par objectifs [PPO / Pedagogy by Objectives] |
| PSE | Plan Sénégal Émergent [Senegal Emerging Plan] |
| PTF | Partenaire Technique et Financier [Technical and Financial Partner] |
| RIB | Relevé d'Identité Bancaire [Banking Information] |
| SIGE | Système d'Information de Gestion de l'Éducation [Information Management System for Education] |
| UEMOA | Union Économique et Monétaire Ouest Africaine [West African Economic and Monetary Union] |
| UNESCO | United Nations Educational, Scientific and Cultural Organization |

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I. Executive Summary

According to the terms of his contract, one of the tasks that the consultant was bound to accomplish during his support work for the Lecture Pour Tous project consisted of “undertaking a study of the costs of textbooks, related to their production, transportation, or management at the school level, as well as how the MEN manages its procedures for budgetary forecasting, procurement, distribution and auditing related to school textbooks. On the basis of this study and of other analyses, the consultant will assist in formulating a policy and other recommendations intended to improve planning, budgeting, preparation, publishing, procurement and transportation of the textbooks, as well as the related management systems and procedures.” Therefore, the goal was to analyze the general ecosystem of the textbooks in Senegal in order to understand all of the workings and dynamics, but also the failures, and to provide recommendations for improving the performance of the system, whether in relation to its financing, its quality, its fluidity or its transparency.

An analysis of the current status confirmed that the school textbook procurement system in Senegal is, without a doubt, one of the fairest and best performing of such systems in francophone Africa. Over the decades, the Senegalese Government, backers and the private sector have woven together a set of supports and interactions which are without equal in the sub-region: the tender calls system is clear, reasonably regular and transparent, and it takes distribution into consideration, which is not always the case in Africa. One of the beneficial results of this configuration is that Senegal has a broad, varied, and agile school publishing industry that is nationally rooted, but knowing how to connect to international partnerships. Considered as a whole, the system may, however, be capable of being improved, in particular in relation to tender calls, for which two levels could be combined to make the system simpler, quicker and a better quality-price value. The prevalence of the phenomenon of publication pirating is, in Senegal, as in any country where it occurs, evidence of a lack of alignment between the supply of, and demand for, school books, and will only be significantly reduced after adjustments have been made to the teaching materials procurement system.

In fact, such a system is a heavy industry which, in principle, represents a recurring annual expense of several million dollars; but it is rare for a developing country to have suitable planning and structures available to make such a passage. This weakness also impacts Senegal, which would gain by providing for itself a multi-year planning system (relating to both publishing and budgeting aspects) for its academic publications. Likewise, if the School Books Division of INEADE is currently the central structure for all teaching materials procurement in Senegal, it would be useful to strengthen it and broaden its powers, both upstream and downstream, in order to provide greater coherence to this exercise permitting the involvement of several ministries, levels of administration, and other fund providers. This strengthened Division would therefore assume the task of applying the new tender calls system in the manner recommended in this study: a system resulting in a national evaluation-selection of three or four titles per subject and per year, from which schools could order their textbooks directly, using a budget granted on the basis of the institution’s staffing. This awarding of procurement budgets at the school level would provide the schools with more responsibility, and therefore, higher accountability and, *finally*, a better quality-price ration for the entire teaching materials procurement system in Senegal.

2. Introduction

In sub-Saharan, francophone Africa, Senegal, along with the Ivory Coast, has the most advanced and expanded publishing system. All types of publishing houses do business in these two countries, from “historic” publishing houses that supported the first steps toward independence, to the more recent ones, resulting from the wave of liberalization of academic publishing that has occurred in the 21st century. The Senegalese government regularly offers national publishers the opportunity to participate in tender calls which has, over time, led to the creation of a community of solid and professional publishing houses. USAID’s Lecture Pour Tous project is based on the publishing dynamism but is far from being able to finance pedagogically innovative titles and, most importantly, in the national languages.

One of the reasons for the existence of this study is to review the current systems that govern the Senegalese publishing ecosystem, from landscape of the publishing houses themselves to the interventions of public actors, whether these are national or international, with a special focus on the financial aspect of each link in this book chain. Starting with this observation, we will attempt to propose several tracks for concrete improvement in the areas of planning, budgeting, preparation, publishing, procurement, transportation and teaching materials management systems in Senegal.

3. Status of the School Book Supply Chain

Before examining how best to tap into the synergies between the MEN and private publishers, which we will address in the second part of this study, it is first appropriate to consider the current state of the various links in the School Book Chain in the country. This will be the goal of this first part which, for each subject in question, will describe the current reality, its strengths and weaknesses, and the difficulties and constraints it faces.

3.1 Curriculum Situation

The current Senegalese curriculum has been progressively generalized since 2009 and is organized according to the approach by skills for all types of teaching: pre-school, elementary and informal education. Upon the institution of the new curriculum, more than 62,000 public and private teachers were trained by APC in the beginning of the 2010s.

With regard to the intermediate cycle curriculum for elementary teaching, we can consider an “improvement”, rather than a complete reform. In particular, a profile of the school graduate with mastery of a set of basic competences at the end of this cycle was defined, as well as the basic competences to support said graduate in private life and the work world. The contents of seven disciplines (Mathematics, French, Life and Earth Sciences, Physical Sciences, History, Geography and Civics) were improved with the production of programs, users guides and pedagogical guides. For continuity of pedagogical choice between the elementary and intermediate cycles, the approach by skill is also in force in the intermediate cycle.

In 2014, PASEC noted that “with regard to pedagogy, the elementary program has used three methodological approaches: entry by contents, entry by objectives or “pedagogy by objectives” (PPO) and the approach by skills (APC). The basic education curriculum that implements this new vision of teaching is intended, among other things, to:

- implement an articulated curriculum, integrated by a systemic approach;
- ensure the subsequent equipping with pedagogical supports (pedagogical guides, free student textbooks);

- improve the quality of teaching and learning through projects and partnerships such as PALME, ELAN, BIE-UNESCO, etc.)
- maintain and broaden the supply of school books free of charge and grant subsidies to parents;
- mobilize all of the actors in education (local collectives, communities, partners, etc.) to subscribe to this change in paradigm.”

The same PASEC insists on the fact that Senegal is “marked by a significant diversity in mother tongues which co-exist with French as a second language. In fact, the national context is plurilingual and characterized by a very large majority of students who enter the education system without having been exposed to the language of instruction, French.

- Students who are not able to practice French at home have fewer opportunities to develop their language competences before entering school and during their primary education, compared to those who practice the language of instruction routinely outside of school.”

3.2 Awarding of Contracts and Distribution

3.2.1 Contract Awarding Systems : Description

School Book contracts in Senegal are awarded according to the procedures in the framework agreement, as prescribed by provisions 25.3 c) of the Public Contracts Code. This agreement, by itself, is supposed to reflect the principles laid down in the School Book and Teaching Materials Policy:

- A public-private partnership for the preparation, publication, production and distribution of school books;
- The abandonment of the monopolistic choice of school books, by the adoption of the approved list, and therefore, of a choice of multiple books
- An intermediate option which is quite unique in Africa with regard to the level of choice of school books: ultimately, it does not play a part at the central level (Cameroon, Chad), or at the school level (most of Southern or Eastern Africa), but at the level of decentralized education structures, or IEFs.

What the MEN calls a “framework agreement file” is a standardized tender call file prepared on the basis of a World Bank model for a tender call, fed by the experiences of several African countries, as well as by the procedures prepared and tested within two public Senegalese structures: the Ministry of Urban Renewal and the National Pharmacy Procurement Administration. Adapted to the specificities of the school book, the framework agreement allocation procedure is conducted in three stages:

First Stage: qualification of publishers to be included in the framework agreement. This consists of the launching of a call for proposals intended to select a group of suppliers which, having met the “minimum” for the qualification criteria for supplying school books and teaching materials, the MEN deems suitable to constitute a pool from which it will be easier “to choose” for the next three years, in order to quickly obtain school books suppliers. Following this first call for candidates, a memorandum for a framework agreement is signed with the candidates retained. The following are its principal characteristics:

- Each framework agreement is multi-assignee and is allotted on the basis of disciplines. For each batch up for bids, it will be necessary for at least three publishers to submit bids;
- The framework agreement will be concluded for a period of three consecutive years.

The selected publishers will have to meet all of the cumulative qualification criteria listed in the tender call file, namely:

Financial Capacity:

The candidate must provide evidence that they meet the below requirements:

- Submit a line of credit certificate issued by a duly approved financial institution, for which the minimum amount is that stated on the tender call document;
- Submit financial statements duly certified by a certified public accountant approved by the ONECCA for national publishers and, for foreign publishers, a qualified accounting supervisory body, and covering the three years prior to the tender call. It is well understood that these financial statements must show a healthy, and possibly surplus, financial situation.

Technical Ability:

The candidate must prove and document that its company's principal activity is the publication of books or, at the least, that it is growing in the book publishing sector. This provision is intended to prevent the opportunistic appearance of economic players that are not from the publishing sector and are attracted by the significant source of income provided by inclusion on an official list of approved school books. In fact, it has not truly played its role since we see that a number of heavyweights in Senegalese current publishing come from different economic sectors (marketing, accounting, real estate, etc.) and that their publishing branches are only the product of late diversification. Having stated this, the outsider nature of certain Senegalese publishers does not seem to us to be a major problem, since, at the bottom line, these companies produce good school books, which are evaluated as such, and they are part of the ASE. We could even say that it is positive that sectors outside of publishing are attracted to the production of school books, which makes it greater capitalization possible for them, along with a certain dynamism, especially in commercial action.

Experience:

The candidate must prove, and document:

- That, for at least thirty-six months, its business has consisted of publishing books;
- That it has published at least one title during the last five years. This provision, much less strict than international standards (where, generally speaking, proof of the execution of at least one similar contract during the last five years), is intended to not eliminate smaller Senegalese publishers of more intermittent production.

Like many African Ministries of Education, changing from Government to a public-private partnership, the MEN was, at first, afraid that its tender calls would attract few publishers, and/or that these publishers would not be professional enough to be retained: therefore, it foresaw the case where a single candidate would be retained for signature of a framework agreement, which provides the MEN with the possibility to open up the competition for allocation of a subsequent contract to other candidates.

Second Stage: Subsequent contract, constitution of an officially approved list at the national level. For a period of three consecutive years, the MEN will launch tender calls to publishers that are a part of this pool, when it must procure school books and teaching materials. These contracts are called “subsequent contracts”. It should be noted that these initial principles have changed: in fact, there are presently two tender calls for bids for approval (in January and July) for which publishers may submit specimens of their work. More surprisingly, publishers may voluntarily submit school books for subjects and levels that they believe are useful. Such a change, as in Cameroon or Namibia, truly reflects the vitality of a sector which has the means to anticipate and to finance the development of manuscripts; but we also see here that publishers are, relatively, taking control of the situation to the detriment of the Government, which is never a very positive trend in the famous public-private partnership, where balance is always quite delicate and likely to be called into question. This leads to modifications in the evaluation-selection means that we will propose in the second part of this study.

Definition. The subsequent contract, awarded on the basis of orders and school book needs expressed by the MEN, corresponds to a teaching set (for example: “CI text book, CP text book and CI/CP guide”) by discipline (and, ultimately, by IEF) awarded to a publisher. It should be noted that the same publisher may be awarded several subsequent contracts. And, in fact, this happens very often, with a group of half a dozen publishers being present on almost all of the MEN approved lists. Is this an oligopoly? Regardless of the answer it is obvious that, as in comparable countries, the market ends up stabilizing around a handful of publishers.

Documents to be Produced. When a tender call is launched for the subsequent contract, the MEN calls on, by letter of invitation, the holders of said batch, or the “official” members of the pool for the batch. In order to be admitted to the competition, the consulted publishers must produce at least the following items:

- Textbook samples;
- A mock-up;
- Prices list;
- Estimated bids;
- Execution schedule.

Allocation Procedures. The first evaluation-selection procedure is conducted at the central level and is intended to constitute officially approved lists (one per title) which will be valid throughout the Senegalese territory, and from which each IEF will choose a single title. These lists are established on the basis of grading thresholds: each of the blocks of criteria (which we will examine in the following paragraph) must receive a minimum grade of 60%. Each publisher that meets this standard will be included on the approved list. These lists, without ceilings, are not very selective (six publishers make up the list in Language and Communication, and the same for mathematics, both lists having been established in the second six months of 2017, while a single publisher was eliminated from Language and Communication, and three from mathematics).

Process of bid evaluation at the national level. The contracts committee assesses the relevance of the proposed text books based on the following items (non-exhaustive list):

- Curriculum coverage, both quantitatively and qualitatively;
- Methodological approach;
- Proposed student activities;

- Directions to teachers;
- Relevance and appeal of illustrations and their presentation;
- Relevance of social and cultural values: suitability to the environment and diversity of geographic, social and cultural realities;
- Readability.

In order to work transparently and to obtain the best possible final products, the qualitative content evaluation grid is annexed to the tender call document.

Pedagogical aspects are evaluated by the National Education inspectors, while INEADE representatives focus on the socio-cultural aspects of the bids. Criteria related to typography and language are assessed by committees combining all evaluating bodies.

Third Stage: Subsequent contract, selection at the IEF level of a title from the approved list. There is a period of four months, beginning with the two national sessions in January and July, during which the ARMP examines the compliance of the selection procedure with the approved lists, and possibly corrects selection using the UEMOA regional preference criteria.

IEF bid evaluation process. In each IEF, a technical evaluation committee - comprised of two inspectors trained in evaluation by INEADE and of three people from the field, as well as in the focal point of the academic text book - allocate the pedagogical grade, using the same criteria grid as that cited for national evaluation.

For example, in the second six months of 2017, this evaluation seminar, including the 59 IEFs from the country, took place at six hotels throughout the territory from December 19 to 23.

The final grade of each bidder is established by combining the results of the qualitative evaluation and of the financial bid according to the following weighting procedure:

- Relevance: 80%
- Proposed price: 20%.

At the end of the relevance evaluation, the envelope containing the financial offer will be opened in a public session, and then integrated into the calculation of the final grade. At the end of the process, each IEF will award each batch to the publisher that obtained the highest final grade.

It should be noted that this quality/price weighting places Senegal in a unique position in francophone Africa and even, on a continental scale, at a best practices level from an international point of view, in the field of textbook contract awarding procedures. When, about twenty years ago, the anglophone countries began to generalize from public-private partnerships for their procurement of textbooks, the quality/price weighting was more on the order of 60/40; since then, they have moved toward a range for the “quality” portion between 70 and 80%, without this impacting control of the unit prices of textbooks. The coefficients adopted in Senegal are evidence of the maturity of this country in the area of awarding textbook contracts.

Beyond mathematical factors, the practices of IEF evaluators over time tend to continue to emphasize the “relevance” grade over the financial bid: when they see a very attractive textbook, the IEF evaluators award higher grades for the “relevance” aspect of the bid, in order to ensure that, in the end, it will not be “duplicated” by a much less expensive, but lower quality, bid.

In the end, we estimate that the Senegalese system for awarding contracts functions relatively well, despite allegations, which are, by definition, unverifiable, of a lack of fairness in the treatment of the

various bidders. In particular, it is interesting that the local authorities can choose textbooks originating in their jurisdictions. Perhaps the IEF represents a rather small constituency? A choice at the level of the schools would lighten the process and make economies of scale in printing and marketing possible. Calculated using the Canadian system (with this country being the principal PTF for procurement of teaching materials in Senegal), the procurement of textbooks in Senegal may seem uselessly complicated and long for a process that ultimately resorts to a de facto oligopoly of a handful of publishers.

3.2.2 Distribution

Due to calendar restraints, the consultant has not himself been able to make field visits, which would have enabled him to report on, from personal experience, the strengths and weaknesses of the school book distribution system in Senegal. It is obvious that an in-depth study of distribution would require a specific inquiry, with reference terms specifically based on this theme. Having stated this, in the context that was imparted to the consultant, and following exchanges with persons having, or having had, responsibilities in the field of distribution of pedagogical tools in Senegal (as part of the MEN or of the LPT Project), several traits have been identified which seem to characterize this type of distribution.

The practice observed in various African countries tends to prove that the elements necessary to effective distribution of textbooks are those listed in the table below. It is therefore interesting to compare these prerequisites with what actually happens in Senegal.

Table 1: Prerequisites and situation on the ground

| Prerequisite elements | Situation on the ground in Senegal |
|---|---|
| Adequate financing, which can be forecast and occurs at the time of textbook acquisition | The MEN has a budget line item of about 2 billion CFA Francs that the national budget dedicates each year to school books. At the same time, the various PTF programs also make significant contributions to this financing. The two annual evaluation-selection sessions are evidence that the Senegalese school book financing apparatus is working properly. |
| Using reliable information from school mapping, staffing and needs | The DPRE [Department of Educational Reform and Planning] conducts an annual investigation of needs, and a SIGE is established. |
| A management staff trained and effective, that can be supported by tested systems (and, preferably, computerized) | The MEN staff have all of the necessary tools; it seems that the situation is somewhat different at the level of the IAs and IEFs. |

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| <p>Suitable transportation and storage equipment</p> | <p>Delivery points for tender calls are the 59 IEFs in the country, which requires the awardee to provide transportation to these points, under penalty of not receiving the last portion of its payment. On the other hand, word from the field indicates there are storage problems at the IEFs, as is often the case in Africa, with this type of delivery going through local storage (intended to be very temporary, but sometimes being endless). Since 2017, the MEN has strengthened the logistical means of the IEFs by providing them with double pick-ups (with support from AMC)</p> |
| <p>Effective monitoring and supervision of the entire system</p> | <p>Arrondissement inspectors are tasked with supervising the use of school books, but due to movement problems in certain regions, visits are not systematically made to each school several weeks after delivery of materials to the IEF.</p> |
| <p>Willingness and ability to accept liability and therefore to correct errors quickly and without schools having to bear possible costs</p> | <p>On the subject of delivery of textbooks in Africa, it is always the last link that is most difficult. In the case of Senegal, this link is the IEF-schools segment. MEN staff avow that there are no problems and that all schools receive their books on time; however, some contacts have shared their doubts with the consultant regarding the truth of this assertion. This essential aspect deserves an in-depth study.</p> |

In light of the table above, we can see the challenges that it would be appropriate to study in greater detail in order to ensure the efficacy of textbook distribution in Senegal:

- Under-investment: what is the current state of storage buildings in Senegal: What are fuel allocations - are they truly used to deliver textbooks?
- Liability: are the IEF inspectors truly motivated to deliver all of the textbooks to all of the schools? Is there a multi-signature procedure for receipts at the school level? Is there a process for sending these receipts back to central?
- Costs: The procedure currently used by the MEN (Dakar-IEFs-schools, the last step being a mix between resources provided by the IEF and the school) is not very transparent with regard to real costs, since the financial weight of transport is “drowned” in the semi-public distribution circuit. It would be interesting to conduct an in-depth analysis of the real costs of distribution: wouldn't they ultimately be higher than those to which one would resort if the contract awardee must deliver to each school directly?
- Equity of distribution: in a system based on the bid, academic institutions are doubly liable;
- Schools do not choose their number of textbooks, they only confirm what the Government gives them;
- Schools only have a part of the initiative in the area of distribution/receipt of the textbooks that are allocated to them - if they are close to the IEF, they come and pick them up, and if they are further

away, they are more dependent on the good will and means of the IEF. Without wanting to assume the specificities of the Senegalese situation, in other countries with systems based on a bid policy, it is reported that the rural schools are at a disadvantage due to more difficult access, therefore, these latter must be served (if they are not already...).

The answer to all of these questions, which are essential if a more efficient distribution system is desired, will be obtained at the end of a possible field study regarding the conditions and real costs of distribution of school books in Senegal.

3.3 Publishers

3.3.1 Profiles

Senegalese publishing is in the midst of a renewal. Of the nine publishers that we interviewed, four were created in the 21st century and three in the 1990s. This amounts to a contribution of new blood that is even more remarkable since it occurs in a context that is somewhat bleak in francophone Africa, which is specifically due to the rarity of academic publication tender calls (which is not the case in Senegal). But, a relatively positive event has responded to the negative aspect of a lack of oxygen which has resulted from the availability of a reliable and recurrent academic market. This event was the devaluation of the CFA Franc in 1993, which, *ipso facto*, made all locally manufactured products more competitive in relation to imported products. This rule also applied to books.

It is interesting to note that the number of publishers is the fruit of diversifications made starting with more “traditional” companies (IPAM, a marketing school; NARA, attorneys and entrepreneurs; Fermon, assets in the field of academic supplies; Didactikos, real estate promoter and seller).

It is necessary to trace back to more historic publications in order to find publishers whose path is like that of Senegal. Papyrus is a very typical example of a publishing house which is universally acknowledged as a pioneer in national languages publications. The journey began in 1993, with two titles, including one which is a collection of poetry in Pulaar. Confronted with the publication difficulties that ARED had to face, in 1996 Papyrus created a double edition of a monthly in national languages. This disappeared in 2013, even though, at present Papyrus would like to relaunch it in two languages, Pulaar and Wolof. Currently, Papyrus has a catalog of about 120 titles; it is the victim of its own success and reputation, since many authors, writing in national languages, send their manuscripts to the publisher, which currently has some 75 manuscripts awaiting publication.

The NEAS – founded by Leopold Sedar- represents the very best of publishers in the African independences and has pursued a type of pan-African dream, with spin-offs in Togo and the Côte d'Ivoire. Unfortunately, this publisher lost its specific status with its privatization in 1989, and a relative loss of dynamism in relation to new arrivals on the Senegalese publishing scene. In fact, the publisher has had little success in winning contracts in the MEN tender calls since it was overtaken in the 1990s by European and Canadian publishing houses, followed by the new generation of Senegalese publishers at the turn of the century. As a result, the traditional economic model of the NEAS, according to which the school system financed literature in general, is no longer very operative and the publisher has lost its life forces, with its executive director even speaking of a “downfall”: circulation has been divided in two (from 20 - 30,000 to 10 - 15,000 for general literature), the number of employees has gone from about 30 to 15, and the publisher is content with producing reprints, rarely producing new titles.

Most of the editions encountered can be described as general in nature. This is true even if some of them have a younger “cast,” - or they can be described as general literature. Among specialized editions are

those centered on “academics,” which are the most numerous. Houses such as Didactikos, Fermon, or EENAS are quasi-uniquely dedicated to the production of teaching materials. Others, such as NARA, have begun to publish general literature, with an emphasis on the “young adults” market, based on a Senegalese and African reality. This house also seeks to promote a taste for literature among young students by creating reading workshops with the support of the Senegalese Association for Teachers of French. These workshops result in the “Scribe junior” collection, uniting young, aspiring writers, identified with the support of the Senegalese Association for Teachers of French.

Data on publishers’ revenue. For publishers, revenue is not always easy to obtain, but the data we have collected emphasizes the diversity of publishers’ situations. These range from a small organization with revenue of 6,000,000 CFA Francs to a large, academically important house posting some 3 billion CFA Francs in revenue. But regardless of the business volume of these publishing companies, they have all confided in us that they have difficulty in obtaining bank loans: between the interest rate (above 15%) and the draconian conditions required by the banks, it is quite rare that this type of financing is ultimately successful (from which, doubtless, results the reluctance of houses based on more traditional and “profitable” economic activities, which provide a certain sustainability in financing). It should be noted that a single house told us they were working with the ADPME, the Senegalese body working in the support of PMEs, and providing the support needed by publishers.

Annual Production. The publishing houses interviewed are clearly differentiated between “historic” companies, fighting to retain their former luster and production rhythm, and the newcomers to academic publishing that endlessly produce new products. Since the MEN authorized publishers to spontaneously propose bids, the trend, logically, is that each house shall have available in its catalog all materials for all school levels, in a more or less updated condition. All of the large, predominantly academic, publishers can submit titles to Reading & Communication and to Mathematics in CI and CP. Certainly, the more senior publishers have advanced this effort in greater depth by multiplying their manifestations: thus, Didactikos states that it can provide textbooks for each of the subjects in the curriculum, at all levels at which they are taught. EENAS, offering a large portion of the elementary curriculum, is also an actor at the secondary level in mathematics, physics, and English.

National Languages. To different degrees, most of the publishers interviewed publish in national languages. Papyrus is known as the oldest house, and as a pioneer in this linguistic medium. Unfortunately, this specialty, from a purely literary point of view, will hardly be able to be developed economically. For example, a publisher asks itself, what good are the books in Wolof and Pulaar that exist at the UCAD, since there is no market for these students, and in particular, no teaching leading to the use of these languages in publishing to the broader public. “Too often, Papyrus told us, prose in the national languages tends to infantilize the reader; novels for adults are written as if they were children’s books”.

Other publishers have adopted a more pragmatic approach to production in national languages - in particular, through the prism of literacy which has been a growing tradition already for several years.

3.3.2 Internal Organization

Employees. The Senegalese publishers we interviewed operate with a number of employees that is almost equal to that noted in Europe for organizations of comparable scale. Thus, EENAS has 18 employees, including two publishing secretaries, a layout artist, two salespeople and an accountant. At the same time, it is possible to find very small organizations, such as BLD, which are more like an NGO than a full-scale publisher. Unfortunately, the number of niche publishers in Senegal (in addition to BLD, we cite

Papyrus, for example), are obligated to “make so many cutbacks” that they do business from the homes of their directors.

What is interesting to note therefore is the increasing professionalism of Senegalese publishing, in contrast with the old non-negotiables of para-state African publishing, of which NEAS is an example; Didactikos has 40 permanent employees on the five floors of its immense central offices, as well as 20 authors who work more sporadically (including sociologists, an attribute of which Didactikos is especially proud). IPAM, now in the start-up phase as a publisher, has a structure that is more branched around four permanent employees, plus an IT specialist and eight sales people deployed throughout all of Senegal, a team that the publisher hopes to develop later.

Training. Despite the existence since 1970 of CAFED of Tunis, intended to contribute to the training of African publishing executives in 2017, it is very rare to find professionals that have completed this program amongst Senegalese publishers. It is necessary to see here a sign that this Center was principally dedicated to the training of publishing executives for the State, above all academics, and then from a post-independence perspective. The creation of great francophone Africa book professionals which grew during the 1970s owes much to CAFED, but since then, the Center at Tunis has lost some of its aura.

Technical Chain. None of our publishing contacts cited the lack of training as a major obstacle. Most of the publishers interviewed embody all of the editorial chain internally, including all of the pre-press functions.

At Nara, for example, the complete development process of a title represents a total of one year of work:

- Identification of authors;
- Contract preparation (the amount of which will represent 10% of the net value of the title, and which may relate to up to 30 teachers for one textbook);
- Levels distributed among authors;
- The work of drafting beginning in January, finished one month later before being transferred to NMI in Cameroon for PAO.

With regard to printing, this can be entrusted to national printers if the circulation does not exceed a certain level. Beyond that, in particular for academic printings, European (Spain, Italy) or Asian (Malaysia) printers are often called upon.

Far from the obsession with stockpiling that haunts many large, general public African publishers, Senegalese academic houses practice a very aggressive policy of availability of their textbooks, so as to be able to meet demands if the MEN calls on them. Didactikos, for example, has three teams of authors working intensively on the same title, then the publisher selects the best manuscript, to have 400,000 copies of it printed systematically, regardless of the results of the MEN contracts. “In three weeks in Italy or Malaysia, for an average of 2 million Euros, my books can be available on the Senegalese market”, its Director told us.

3.3.3 Sales Policy

National Distribution. The NEAS have tried the wholesale experience, which call themselves specialists in bookstores/stationers due to their sales in the provinces, with a high level of satisfaction. These

wholesalers are especially focused on the informal sector of second-hand bookstores and accomplish their distribution through a very informal network of parents and friends established in the principal cities of Senegal. Discounts at the regional points of sale amount to 20% or 30 % on the basis of a final sale without the possibility of return. Didactikos, to the degree of its presumed thoroughness, has its own delivery fleet: three large trucks, two intermediate-sized trucks, four HiAces. For less important markets, this publisher ships by three containers, which deliver in each region from the train station. Faithful to the total commitment that it expects from its staff, the director of Didactikos asks certain graphic designers, as their first line of support, to accompany the drivers in intensive deliveries or over winding roads.

Dissemination channels to the general public. Outside of academic markets, the essence of the dissemination effort of publishers is done through traditional bookstores (Clairafrique, Didactika), on the order of 80%. And these bookstore sales rely essential on points of sale in the capital. The discount to bookstores is on the order of 30% to 35%. We note routine recourse to ADP press releases in order to provide for needs outside Dakar.

The NEAS also have a warehouse, but it only houses a reduced inventory, because annual revenue has fallen to only 600 million CFA Francs, and only due to the presence of certain general literature titles in the school program. The “historic” Senegalese publisher further complains of a lack of bookstores, and of decrease in small orders from municipal or public libraries, which previously constituted a large share of its orders.

“Alternative” dissemination channels. Certain publishers, in particular those with a healthy share of production in national languages, have attempted with more or less success, some more targeted means of dissemination. Thus, Papyrus, supporting itself on its “national languages” roots, sells some of its works in villages using a barter system, where books are exchanged for millet, livestock, or even chickens. This system, which is more suited to daily life in rural Senegal, obviously poses a management problem for the publisher in increasing revenue.

Focusing on youth and national languages, Kalaama is directed by Mrs. Gakou, who is the former President of the Senegalese Association of Business Women. She is without a doubt no stranger to the creativity she demonstrates in disseminating her works. In its domestic market, Kalaama has access to the files of the Association of Senegalese Banks, and can therefore target all of the employees in the national banking sector, who regularly receive the publisher’s offerings. Since it has the email information for the employees of the BCAO, Kalaama offers them sets of ten titles to be paid for in installments. Business acumen goes beyond targeting clientele, since it also makes it possible to bypass the extreme under-banking suffered by Senegal, as well as in most developing countries. Which occupational category would be most likely to have a bank account...if not the bank’s employees, obviously?

But Kalaama also targets dissemination beyond the borders of Senegal, and even beyond its continent. Who knew that the United States had more immigrants and citizens of Senegalese origin than France? We must confess that we did not know. But not Kalaama, which has joined a partnership with the mayor’s office of New York City, to which it routinely supplies English/Senegalese national languages bilingual works for its city libraries located in neighborhoods with high Senegalese immigration.

Distribution channels for academic markets. The professionalism of Senegalese academic publishing is very visible in the logistic strength of its principal actors. Didactikos has a team of four people who are permanently in the field, and pedagogical delegates who are former teachers. This publishing house is also in the habit of leaving samples with teachers for a period of six months, and then of reworking its manuscripts using feedback from the field.

Nara, with a looser structure, prefers to concentrate on the “most significant” IAs (principally Dakar, Rufisque, Thies, Ziguinchor and Kaolack), as well as on the 39 most “profitable” IEFs; always mindful of

efficiency, the house has undertaken a partnership with Catholic schools, an important prescriber in the field of teaching materials.

The EENAS have created their own distribution network, resulting in a very tight network throughout the territory. This publishing house states that, in one week, it is capable of distributing a million copies, using, among other things, a logistician who is capable of optimizing the company's fleet of trucks and staff contracted for intensive delivery operations.

Book Fairs. These fairs are supposed to be a sure bet as a regular meeting to promote books. However, over time these meetings have been dropped from the agendas of publishing professionals in francophone sub-Saharan Africa. The Dakar FILDAK still exists, but its reputation is poor. "Why invest three or four million CFA Francs in that?" a Senegalese publisher asked us. "The return on investment is bad, and the fair is a service only for a small circle of insiders." In fact, this fair was held at the time this study was being conducted, and it is necessary to report that this event, poorly promoted, located in a convention center outside of the center of the city and with very little equipment for the exhibitors or visitors, is not the cultural non-negotiable that it may have once been. But FILDAK deserves credit for gathering almost all Senegalese publishing professionals and making it possible for visitors to get a relatively complete overview of national publishing products.

3.3.4 Relations with African/European Publishers

One of the signs of the dynamism of Senegalese academic publishing, which itself was made possible due to the open and constant policy of the MEN, is the more and more frequent existence of partnerships between Senegalese publishers and foreign publishers. Even if it is difficult to get Senegalese professionals to confirm the origins and outlines of these partnerships, the general idea, for publishers in Dakar, is to be able to gain support from the publishing logistics and experience of the "big names" in academic publishing, which are of European or African origin. That goes hand and hand with the difference, which we have already emphasized, between the regularity of supply bids and the scant experience of publishers, many of whom come from other economic sectors.

Thus, IPAM justifies its partnership with Longhorn with the fact "that they learn a lot from the contribution" of the Kenyan publisher; Fermon explains that it shares co-publishing expenses with its partner, Hachette; only EENAS is more evasive in admitting that it leans on its Canadian partner Beauchemin "as needed". In general, the Senegalese publisher can thus use the PAO platform of its more developed and more experienced partner, which is useful in the context of tender calls with sometimes tight deadlines. Longhorn assists with the digitization of the IPAM catalog. Having stated this, a very well-established academic publisher such as Didactikos may also become partners with the publishers in the sub-region, for example, by "packaging" with a Malian publisher.

These associations may also be the source of some friction between foreign partners who may have a tendency to impose their work styles or have their catalog adapted. But, for the moment, they are rather positive for Senegalese publishers and, long term, for Senegalese publishing in general, which is enriched by these outside contributions.

But some non-Senegalese publishing houses are also taking their chances going it alone, without any agreement with a Senegalese colleague: the principal editor in this configuration is the French Humensis, better known under the name of its Belin brand. And it is doing so with a certain degree of success: the Parisian house has already seen its titles approved for certain grade levels and subjects, and it maintains a small business presence on site. However, its international director acknowledges that managing a Senegalese academic initiative from Paris is not easy and, furthermore, during periods of intense activity

(bid submissions, contract signing, sending of samples for inspection), he goes to Dakar several times a month. In addition, it has serious problems with pirating (see paragraph below).

3.3.5 Principal Problems Faced by Senegalese Publishers

Even though Senegalese publishers enjoy what is, without a doubt, the most favorable policy and financial framework in francophone Africa, they nonetheless have complaints to express about their daily work.

Pirating of books. It is indisputable that counterfeiting is the problem that arises most frequently in the conversations we have been able to have with Senegalese professionals. “*Parterristes*,” more or less informal bookshops, resell textbooks, often pirated abroad, at 20% to 30% of the publisher’s price. The EENAS confirmed for us that a team of attorneys has been working on this problem since 2015. Even Humensis, a French publisher, but one that is on the MEN approved lists, has conducted raids with the anti-counterfeiting squad of the Senegalese Police on resellers offering copies of their textbooks. But, despite court appearances, no sentences have been handed down. Didactikos confirms that it has about ten full-time employees who scour the streets of Dakar to identify possible counterfeits for sale, traveling on scooters duly labelled with the publisher’s name. But the policy of this publisher is not to be content with court actions; it deems it more effective to “flood” these resellers with genuine Didactikos textbooks, in order to kill “fair” competition, with higher quality products at a reasonable price.

Beyond the various tactics implemented by publishers, the fact that there is a significant market in pirating is, as for every country with this problem, always a bad sign in relation to market balance, the “fair price” of the textbook, and the limits of free distribution.

Publishing in national languages. Traditionally, and still for the most part, Senegalese publishing, including academic publishing, is in French. As a result, in the case of books for children or of textbooks in national languages, publishers are confronted with a certain scarcity of potential authors - that is, persons who have sufficient mastery of one of the national languages - of specific pedagogical techniques and of writing. And, even when a publisher is able to find an author who has all of these skills, there is a high likelihood that this person is either an official at MEN or INEADE, which disqualifies them as a future textbook author in order to avoid any author/evaluator conflict of interest. Increasing the “pool” of authors qualified in national languages constitutes one of the challenges of Senegalese publishing in the years to come, in particular from the perspective of the “teaching languages” status more frequently given to national languages.

Other problems were cited by the publishers:

- The lack of book promotion in Senegal (for which, one publisher told us, the budget would represent less than that allocated to the fight against tropical diseases - even if that does not seem to be quite legitimate);
- The fact that, since Senegal is not a signatory of the Nairobi Protocol, inputs required for the manufacture of academic textbooks are not tax-free;
- The time allocated to publishers for the preparation of their manuscripts in the context of the MEN tender calls is too short;
- The prevalence of plagiarism of (non-academic) titles in national languages;
- The need for the State to create a National Library Fund which also supports the promotion of authors;
- The need to recover reading in the academic environment;
- A traditional vision of the book in Senegal, perceived by the large majority as a luxury product reserved for the elite;

- The costliness of books (despite tax facilitations), a consequence of the high cost of inputs;
- The lack of an established and standard distribution circuit;
- The over-concentration of book infrastructures (publishing houses, book stores, printers, etc.) in Dakar;
- The lack of accredited professionals in public reading institutional networks.

3.4 Involvement of Senegalese Inter-Professional and State Structures

The Association of Senegalese Publishers (ASE), created in 1999, presently has 37 members and is officially tasked with:

- Uniting all book publishing structures
- Monitoring common interests in publishing
- Making work tools available to book professionals

Beyond these standard issues, the ASE is currently focused on the possibility of upgrading the “UEMOA preference” premium in the academic publishing tender calls issued by MEN to 50%, while it is currently now 15%. The model used by the ASE is that of the Ivory Coast, a system that is virtually locked onto national publishers, and therefore lacks the oxygen necessary to true competition. This claim was officially reiterated during the last FILDAK in November 2017, by a statement from the Director of the NEAS, Amy Sy:

“The book industry is capable of creating up to almost 400 jobs in Senegal, given the fact that there are nearly thirty publishing houses here. Some States have put an end to the outside monopoly, simply by decreeing national preference, at least on proportions which exceed the current 15%. And that that has produced economic gains such as the ability to create jobs related to the publishing trades. But this is not a unanimous opinion. During the same event, the representative of the National Education Ministry was required to recall that this is competitive bid contract, open internationally. Which explains, according to him, the fact that large publishers are participating and are winning significant market shares. However, he continued, in order to provide solutions to the problems confronting publishers, the authorities have decided to assist them in the context of Canadian cooperation. This has implemented an active component into the textbook, financed in order to strengthen the abilities of the publishers in technical areas, but especially in procedures for mastering the Procurement Code.

The ASE is financially supported by the Canadian Embassy to Senegal. From March to November of 2017 in particular, about forty training sessions were held in order to develop the professional skills of Senegalese publishers.

The Department of Books and Reading (DLL) is one of the institutions implemented during the years and decades after independence in order to promote cultural activities in Senegal. The DLL is a structure of the Ministry of Culture charged with studying all issues related to the creation, publishing, printing, dissemination and commercial distribution of books. Certainly, academic books, properly understood, remain under the guardianship of the MEN, but the fact that general literature books can be supported by the DLL can assist in the growth of children’s publishers - in particular, those publishing in national languages.

The official mission of the DLL consists of:

- Working on the promotion of Senegalese writers and their works;
- Supporting the development of publications in national languages;
- Promoting books and reading;

- Monitoring and promoting training, strengthening the capacities of the book trades for professionals;
- Publishing and promoting the book;
- Developing and coordinating the national network of public libraries and reading centers and cultural encouragement.
- Organizing national and international events for promotion of the book; FILDAK, International Day of the Book, literary meetings, etc.
- Participating in book fairs and salons organized abroad;
- Supporting private initiatives for the implementation of libraries;
- Collecting and preserving the national publishing production;
- Financing and monitoring publishing, co-publishing and translation projects submitted by writers and publishers;

Since 1972, the NEAS have created the Senegalese Copyright Office, SONAPRESS (Society of the Press, Publishing and Publicity), New Print Shops in Senegal. In 1976, a national network of libraries was created, currently constituted of 14 regional libraries, of 16 CLAC. These reading and cultural encouragement Centers were designed and installed in the context of the partnership program with the OIF; they are tasked with facilitating access to documentary information in the rural environment in general and in their home areas in particular.

3.5 Involvement of the PTFs

The historic PTF for academic textbooks in Senegal is the ACDI (now, AMC), or the Canadian government through its embassy in Dakar. Since 2012, the ACDI has financed a study that created a synopsis of the situation of the academic textbook in Senegal. The report is fairly grim, emphasizing in particular the lack of conformity of textbooks for elementary programs, as well as significant problems with procurement mechanisms.

In the face of these gaps, the governments of Canada and Senegal are committed to a partnership providing quality academic textbooks to all students and teachers at the elementary level. This all began with assistance from Canada in the preparation by the MEN of its policy on academic textbooks and teaching materials. In force since May 2013, this policy holds that the procurement of academic textbooks will only last if it is supported by a suitable and effective mechanism. The Senegalese Government has renewed its commitment regarding the provision of academic textbooks free of charge to the public sector and has undertaken an initiative to promote the development of a national publishing industry.

Thereafter, the support of the Canadian government made possible the delivery of more than 3.3 million academic textbooks¹ to 1.3 million students in 2014 and 2015, or a sufficient ratio so that each student was able to take his textbooks home.

Canadian support of academic textbooks in Senegal has now reached the level of the “end user” of the book chain, by means of support of the development of abilities in the physical repair and management of academic textbooks. More specifically, this support, which in its pilot stage dealt with only a few IEFs, is supported by the GIEs of selected and trained youth, who provide their private academic textbook repair services to the schools. This initiative, which calls on independent workers (youth, women), completes implementation of procurement reform for academic textbooks.

Other partners are also present in the field of the school book in Senegal:

¹ These textbooks correspond to the “Curriculum Review Guide” for 2013

- USAID, of course, through the Lecture Pour Tous program;
- Chinese cooperation and the BAD, which support a Support Program in the Private Sector through the PME's Development Agency from with publishing houses also benefit (in particular, in the area of setting prices).

4. How to Improve the Synergy Between the Men and Private Publishers, with a Specific Emphasis on the Promotion of Early Reading

4.1 Establishment of a Minimum Set of Criteria for Teaching Materials

It would be desirable for the MEN to establish, for each academic year, a minimum set of criteria for teaching materials (PMMD) required for the achievement of learning objectives as described in the curriculum:

- The PMMD is a minimum list of teaching and learning materials, defined by a mutual agreement between the different stakeholders (INEADE, pedagogical advisors, DPRE, DAF, MEN, etc.) that students and teachers need so that most students may achieve the learning objectives described in the curriculum.
- The PMMD is expressed quantitatively (1/student, 5/class, 1/teacher, etc.) as well as in terms of objective, life span, or rate of loss and deterioration.
- The PMMD is defined by class level and by subject.
- The PMMD must be within the financial scope of the Government and/or parents, and it must be sustainable in the long term².

Table 2: Example of a minimum set of criteria for teaching materials for the CI, CP, and CEI

| Subject | Student Book | Teacher's Guide | Other Teaching Materials Type | |
|-------------------|------------------------------------|-----------------|-------------------------------|-----------------------|
| | | | Type | Ratio by teacher/year |
| National Language | 1 for the school 1 for the home | 1 | Reading Books | 30 |
| | | | Practice Books | 30 |
| | | | Audio Teaching | 1 |
| | | | Vocabulary sheet | 1 |
| | | | Vocabulary wallchart | 1 |

The establishment of a PMMD is an iterative process which can be conducted within INEADE - with possible support from technical assistance - with the goal of attaining the following objectives:

- Designers' definition of the programs of study for teaching materials necessary to both teachers and students;

² It must be noted that current policy in Senegal specifies that academic textbooks are free. The State of Senegal, through the BCI (Consolidated Investment Budget) allocates to MEN, each year, a budget line for the acquisition of academic textbooks. Its technical and financial partners supports it in this effort. Which does not prevent a minority of parents from purchasing various teaching materials directly from book stores, legally.

- Analysis of the costs involved in these recommendations and comparison with the available financial resources;
- Pilot experiments and/or micro-tests resulting in assessments focused on the ease of use, the impact on results, use time, etc.;
- Observations in real situations - actual actions of teachers and students in class;
- Discussions with teachers and students;
- Establishment of a revised list of teaching materials;
- Second cost analysis and budget comparison;
- If needed, a final cost reduction analysis (taking cash flow as well as the amortization of the investment in PMMD into consideration);
- Definitive PMMD;
- All of the processes can be completed within a period of two months.

4.2 Planning and Costs

Academic textbooks are a heavy industry which require large investments that must be planned years in advance. But it must work within the paradox that causes this heavy investment to co-exist with the urgency of needs, and Senegal does not escape the rule according to which the delivery of teaching materials does not occur at the same time as the return to classes. The less planning that occurs, the greater the costs will be, causing the system to arrive at its “lean October”, specifically so that textbooks can be present in the class rooms when school begins. Therefore, there is an interest in anticipating financial and logistical impacts years in advance.

In order to obtain a clear vision of future needs and of how they could be financed, it would be appropriate for the MEN:

- To establish a 5-year projection of the minimum needs for teaching materials;
- To calculate these needs over 5 years;

The estimation of the projected cost of procurement of teaching materials can be done by using / adapting the simple formula below:

$$a \times b \times c \times d \times e$$

$$f \times g$$

a = Number of pupils in elementary

b = Number of textbooks required

c = Unit cost of a textbook

d = Annual rate of loss/deterioration

e = Number of teacher's guides

f = Expected lifespan of the book

g = Target number of books/pupil

The assumptions of the above formula are translated into figures in the table below:

Table 3: Cost assumption on the basis of RNSE 2016 figures allocated to a co-efficient of annual increase of 3.76% (as reported in the DPRE figures 2013-16 average)

| Item | 2019-20 Assumption |
|--|--|
| Number of elementary school students | 2.25 million |
| Number of textbooks required per year | 5 |
| Unit cost of a textbook - delivery to the school | 2 US\$ / 1158 CFA Francs ³ |
| Annual loss/deterioration rate | 10% of inventory each year |
| Number of teachers' guides | 1 teacher guide per subject and one textbook per subject for 40 students |
| Book life expectancy | 4 years |
| Book/targeted student ratio | 1 / 1 |

Using this assumption, the recurring *annual* cost of procurement of school books for Senegalese primary teaching would be, beginning in 2019/20:

$$\frac{2.25 \text{ million} \times 5 \times 2 \text{ US\$} \times 1.1 \times 1.025}{4 \times 1} = 6.342 \text{ million US\$} = 3.671 \text{ billion CFA Francs}$$

It is also important to identify and quantify sources of financing for the procurement of teaching materials. These can be grouped in three large categories:

- State
- PTF
- Parents/Students
- Sponsors/NGOs

Applying classic cost reduction procedures until there is an equilibrium between needs and financing:

- Reduction in the number of required titles (after a critical evaluation of the curriculum) - as well as going from six to four subjects per academic level - will lower the costs of procuring teaching materials by 25% (a reduction of subjects especially in primary classes is also part of the recommendations for a possible review of the CEB on the basis of international research, especially with the objective of promoting mastery of basic literacy and numeracy skills, as well as in view of bilingual reforms);
- Extension of the life span of textbooks;
- Less ambitious student/book ratio objectives: going from 1/1 to 1/3, the costs related to teaching materials could be reduced by at least 60% (even if this option should, *a priori*, be eliminated in relation to basic, early reading materials);
- Establishment of textbook loan systems, which are less onerous than acquisition of textbooks by families;

³ On 1st November 2018: 1 US\$ = 579 CFA Francs

- A more modest number of pages and formats, being part of the requirements of tender calls, can lead to an economy of at least 10%;
- Using short-term library loans, textbook/student ratios of 1 to 6 can become more effective.

4.3 Improvement of Tender Calls System

The current MEN tender calls are, without a doubt, the most in compliance with international “best practices” in francophone Africa that exist:

- Creation of an official list of approved teaching materials (LOMDA) in the form of a catalog listing textbook titles (student books and teachers’ guides) and other teaching materials which will meet the eligibility criteria laid down by the MEN;
- Selection from this list of one title per IEF/level/subject using a list of criteria (compliance with programs of study, physical and content quality, price, etc.);
- Objective and agreed methodologies and criteria for the selection of textbooks;
- Well organized evaluation executed by a pool of trained evaluators;
- Prohibition against conflicts of interest;
- Evaluation in seminars.

However, there are still areas for which improvements may be considered:

- Is the logic of the multi-year framework agreement followed by choice at the IEF level really justified? What is its real added value in relation to a simple tender call, which includes both the generic requirements criteria and the technical criteria for minimum content and physical quality? This dual selection seems to contribute useless complication and a lack of visibility.
- Like all systems based on a minimum threshold (and in this case 60% of maximum points), the Senegalese device does not seem very stringent in the matter of access to a national approval list.
- Would it not be necessary to have a ceiling on the number of publishers chosen for each title? The more titles selected, the lower the circulation, therefore, the higher the unit price of each textbook.
- It would be appropriate to give more weight and independence to the financial bid.
- Current evaluation criteria are quite exhaustive; however, as with any grading system, it may not be useless to consider a possible revision, for example, on the basis of the following:
 - Compliance with the curriculum (with a threshold of 80% per criterion);
 - Content : relevance, precision, currency, sufficient quantity, level, organization and sequencing, inter-subject links, genre, representation of national diversity, activities, and exercises, methodology, development of skills, problem-solving, etc.;
 - Language : simplicity, readability, accuracy, relevance, editorial quality;
 - Mock-up & Presentation : clarity and attractiveness of the format and page layout, precision and relevance of the illustrations, quality and interest of the illustrations, ease of use, balance between text and illustrations;
 - Teacher’s Guide : evaluation aid in class, supplementary content, adaptation to heterogeneous class situations, low or no-cost ideas, inter-subject references methodology, help in planning and presentation, IT support.

In summary, the current system with two stages (broad eligibility at the national level plus selection at the IEF level) works well enough in the country from which it was imported (Canada) but seems uselessly complicated to, as well as cumbersome for, a country with different socio-economic conditions, such as Senegal. It would seem quicker and more equitable to propose a device inspired by

what is done in other African school systems: an evaluation-selection at the national level of three or four titles per subject and per year, from which schools could directly order their textbooks, using a budget granted on the basis of school staffing levels (variations of which are described in paragraphs 2.4.3 and 2.4.4 below).

Instead of the current evaluation and management of tender calls system, it seems prudent to formalize the textbook evaluation architecture by creating two entities: a committee for the approval of publication tender calls - the Committee for the Approval of Teaching Materials - which would officially validate the results of publishing tender calls submitted to the second committee – the Committee for the Evaluation and Approval of Textbooks - whose function is described in this paragraph. In fact, it is useful to separate the purely technical work of evaluation, done by the CEAM, from the function of official approval for the entire process, which is left to the CAMD. It seems logical that this CAMD be chaired by the Director of the INEADE, with the other offices being able to be occupied by the following people: three representatives of the ARMP, one representative of the INEAD Academic Textbook Division, an elementary school teacher, a representative of the DEE, and a representative of the Inspectorate, with the secretariat being led by the DMS.

To the degree that a genuine evaluation-selection⁴ would take place at the national level, it would perhaps be appropriate to strengthen the “guard rails” in order to make this exercise as transparent as possible:

- Group all of the evaluators and their management under the label of “Committee for the Evaluation and Approval of Teaching Materials” of the MEN;
- Sever general and technical evaluation from that related to content and presentation;
- Ensure that evaluation remains anonymous;
- Form a pool of evaluators while ensuring that the composition of evaluation panels (one for each subject) is as diverse as possible; some members of INEADE, but also active teachers (from the various regions of Senegal), university specialists in the subject, inspectors, etc. This training will take place shortly before the evaluation itself, ideally in a location outside of Dakar;
- Prohibiting conflicts of interest (for example, ensure that it is impossible for an evaluator to also be an author for one of the bidding editors);
- Do not reveal the evaluators’ names before the end of the evaluation;
- Conduct the evaluation in a secret location;
- Restrict the number of evaluators (five to seven per panel);
- Install a Chairperson of the Panel (a moderator) who does not grade the submissions but who verifies the grading sheets of the evaluators and investigates possible grading inconsistencies;
- Have the entire process supervised by a full-time evaluation manager;
- Make an effort to grade objectively, and not subjectively;
- Design detailed grading sheets that hold the attention of the evaluator to specific criteria and sub-criteria;
- For each of these criteria and sub-criteria, ensure that the range of grades is clearly established;
- Provide the evaluators with instructions to guide them in their evaluative work;
- Have the coefficients calculated by the moderator, not by the evaluators.

⁴ To the degree that a “quality” factor is involved, this type of evaluation-selection should only apply to a publishing tender call or a publishing-printing tender call.

Table 4: Example of a schedule of a tender call for a new textbook specified for the September 2020 return to classes

| Activity | Deadline (for a textbook for school year 2020/2021) |
|--|--|
| Establishment of the new CEAM, nomination of Tender Call Managers; training of these entities/persons | September 2019 |
| Finalization of the new submission system, evaluation and approval of textbooks (aided by an evaluation methodology, a grading system and a management guide). | September 2019 |
| Training of publishers in responding to the tender call | September 2019 |
| Official notification of the tender call in the press | October 2019 |
| Interactive information seminar intended for the publishers regarding the conditions and requirements of the tender call | October 2019 |
| Drafting/preparation/adaptation of the completed manuscripts by the authors and the publishing houses: mock-up, illustrations, preparation of laser outputs, blank mock-ups and printed pages. | October 2019 to March 2020 |
| Pre-selection, training and final selection of the evaluators | February 2020 |
| Deadline for the submission of bids for evaluation and approval | March 2020 |
| End of CEAM evaluation and approval cycle | February 2020 |
| Official confirmation from the MEN of the recommendations given by the CEAM | May 2020 |
| End of appeals | June 2020 |
| Notification to the bidders retained by the CAMD and signing of contracts | June 2020 |
| MEN warehouse delivery of samples of textbooks from the retained publishers and BAT | July 2020 |
| Printing | July-August 2020 |
| Confirmation by the MEN of the compliance of the finished textbooks with the bids submitted for evaluation-selection | End of August 2020 |
| Definitive green sheet given by the MEN for distribution by publishers of their books to the schools | End of August 2020 |
| Distribution by the publishers at the school level | August-October 2020 |

In order to prevent any ossification of the system, it would be appropriate for all of the evaluation-selection and distribution procedures to be annually monitored and possibly revised.

4.4 Distribution Rationalization

4.4.1 Principal Gaps in the Current Distribution System

Gaps in the distribution system:

- Late and/or random arrival of textbooks in the schools;
- Inequitable distribution of textbooks - according to the 2014 PASEC, 89.5% of students in the Southeast region and 33% in the Central region have less than one mathematics textbook per student;
- Lack of awareness by the schools of their future textbook allotments;
- Collection expenses higher for rural and isolated schools;
- Transport and storage at the IA/IEF level are significant factors in loss and deterioration;
- The cost of the system is, without a doubt, high, even if it is difficult to determine, because it is drowned out by general administration expenses.

Late and random deliveries go hand in hand with:

- Inadequate tender call calendars - in particular, an insufficient grasp of tender call deadlines;
- The system for collecting textbooks between schools and IEF.

4.4.2 Answers to Provide

Make deliveries to schools more predictable and more chronologically appropriate by:

- Designing better tender calls calendars and more closely monitoring the deadlines for their various stages;
- Focusing on the delivery/collection problem between the IEF and the school;
- Decentralizing decisions regarding the selection of textbooks from an approved list by making their own purchasing power available to the schools;
- Augmenting the network of local bookstores;
- The fact that the school will have more control over its procurement of teaching materials should lead to a better use of these materials in class, through increased visibility and appropriation on the part of the school community;
- A “Track and Trace” system can also be planned, built on the current Senegalese SIGE, making it possible, through simple technical solutions (based, at the school level, on the use of the mobile telephone), better feedback of information and, perhaps, greater accountability of all the players in distribution.

4.4.3 1st Variant: Selection at the School Level, National Acquisition

Using the acquisition budget which will have been allocated to them on the basis of their staffing and on the list of approved teaching materials, the schools order their teaching materials from the publishers. Delivery is then arranged to the IEF or school. When the integrity of the delivery has been verified by the Comité de Gestion (Management Committee) or a Comité d'Établissement du Matériel Didactique (Teaching Materials Design Committee) - which should be created - and the IEF authorities, the IEF/IA

authorizes the INEADE Division du Manuel Scolaire (School Textbooks Department) to manage paying the publishers.

Such a procurement system:

- Would support selections made at school level from a list of approved teaching materials following a competitive call for tenders;
- Would be founded on purchasing power which would originate from the “demand” side of the book chain, under the supervision of the teaching team and parents;
- Would allow each Senegalese schools to have constant financial allocations from one year to another, distributed through a centralized management unit, and to draw up multi-year plans for acquiring teaching materials.

The funding of teaching materials should be concentrated within a national account exclusively dedicated to this purpose, managed by a private financial institution with branches throughout the country. In time, it would of course be ideal for each Senegalese education establishment to have their own bank account exclusively dedicated to the acquisition of their teaching materials.

It will be necessary for local education authorities (from educational establishments to national departments through the IEF and IA) to receive targeted training with regard to budget management. Beyond this training, a proper financial auditing system should be implemented to monitor any potential erroneous, inefficient or fraudulent use of the teaching material funds. Such an audit could result in an annual report, supported by reports on the accounts of education establishments chosen at random. It is conceivable that schools that regularly suffer from financial problems would receive management support.

Current gaps in density in the bookselling network - the fact that a large proportion of Senegalese pupils live far from any bookshop worthy of the name - represent just one factor which could tip the balance towards a system in which schools use their financial grant per pupil to order their teaching materials through a centralized system. In the rare areas where there is a minimal offering of bookshops (Dakar, and also the urban areas of the Région Centre and other regional centers) the balance could tip towards a bookstore-focused ordering and distribution system; this would result in a somewhat two-speed system but is an option that cannot be ruled out. Assuming that MEN intends to develop the national network of bookstores up to IEF level, it does not seem impossible to organize a smooth transition towards the sale of textbooks from bookstores.

Initially (a transition period with a length to be discussed within MEN), the “selection by schools/centralized ordering” option would operate as follows:

- The process for defining a PMMD and the approval and accreditation of textbooks proceeds as described previously and is common with the two variants described in 2.6.3 and 2.6.4;
- Each school is provided with an annual acquisition budget based on the number of staff and exercised through the current approved list and a purchase order;
- Equipped with these documents, each school makes its own decisions on the teaching materials to order, up to the financial envelope allocated to it, and completes the purchase order to be sent it to the IEF;
- All IEFs in a province send the orders to the IEF, then to the IA, who then passes them on to MEN in Dakar;
- MEN consolidates all the orders by publisher;
- The publishers deliver their materials to all the IEFs / all the schools.

4.4.4 2nd Variant: Selection at the School Level, Acquisition through Local Bookstores

Such an option would involve adopting local purchase vouchers allocated to school establishments based on the number of pupils expected to attend during the next school year. These purchase vouchers may only be used with certain retailers and for the purchase of certain merchandise. This approach led to spectacular results in Uganda, a country where almost the entire network of local bookstores has disappeared, and where all regional capitals now have multiple points of sale for books, and open accounts with main publishing houses in Kampala.

a) General principles

Schools send an order through a local bookstore (which must be a member of ASE and be linked with a recognized bookstore in Dakar or the regional capital in order to reassure publishers). The bookstore sends the order on to the publishing houses, which are used by bookstores to delivery learning materials to the IEFs or schools. The entire delivery is verified by a Comité d'Établissement du Matériel Didactique (Teaching Materials Committee, CEMD) created in the schools and at the IA/IEF. The schools then pay their bookstore using a local purchase voucher, allocated by the MEN, the amount of which corresponds to the grant (based on the number of children taught) of learning materials to which the school is entitled.

These two approaches could be combined, for example by reserving 75% of the global learning materials budget for textbooks and 25% for other types of materials (library books, educational posters, atlases, etc.) - each of the procurement methods described above corresponding to one of the two categories.

b) Brief description of the procedure to follow in this example:

- Events run by publishers in the form of regional workshops to promote their products under the aegis of the IA/IEF;
- Bookstores tour the schools within their local area to promote their services;
- Learning materials ordered by schools;
- As far as possible, schools must be able to choose between firm, written offers from three different bookstores;
- The CEMDs note the details of the offers presented by each bookstore in their deliberation records, including any discounts or any other type of service offered by the bookstore. The purpose of this is to ensure that the real reasons why a particular bookstore was chosen over another are known officially (effective service and no illegal offers of money);
- With this in mind, it is important that the MEN supplies schools with template service letters from bookstores and template contracts that could be signed between the bookstore and school establishment;
- Supply chain from bookstore to school;
- Strictly speaking, the bookstores should offer schools free delivery of the materials ordered;
- As some schools are very isolated, in these cases the bookstore may request that they come and pick the materials up from the store, or that they arrange delivery themselves;
- Payment by schools using their local purchase voucher; the procedures for using these purchase vouchers are relatively complex and require significant training in their use, from school level through to central level, from IEFs and IAs, lasting around six months.

4.5 Systemization of Teaching Materials Management Procedures in Schools

Without directly seeing the realities out in the field, the consultant was able to draw on the information provided by their contacts in the capital, some of whom held positions involving the management and maintenance of textbooks. It seems that this final link in the book procurement chain could also improve in certain aspects.

4.5.1 Identifying Areas for Improvement

Design a low-cost program to improve the storage of textbooks and other teaching materials in classrooms and thus reduce the losses and damages undergone, increasing the lifetime of the books, improving use patterns and reducing costs:

- Study of current storage conditions;
- Solutions adapted to each type of existing storage;
- Suggestion of fast, simple, cost-effective solutions;
- Recommendations to be implemented for schools yet to be built.

4.5.2 Drafting of a Manual for the Storage and Care of Teaching Materials

Study of current school management systems for stock and drafting of a manual for storage at schools which must be used in schools:

- Management of teaching materials inventory
- Simple recording systems
- Book catalog codes
- Use of an inventory catalog
- Use of a loan registry and loan systems
- Storage of books
- Care and repair of books
- Storage of books

4.5.3 Cascade Training

A training module on the use of the textbooks and other teaching materials in the classroom already exists, but it could be updated and include initial and continuous training for teachers.

- The textbook as a planning tool
- Care of textbooks
- Teaching children to take care of their textbook
- Using reading passages from the textbook
- Using activities from the textbook
- Using illustrations and other visuals from the textbook

- Using exercises from the textbook
- How to ask questions
- The textbook as an evaluation tool
- Teaching approaches using the textbook

4.6 Reading Corners and Libraries

The MEN and Lecture Pour Tous already include school reading corner and library programs. The following points should be considered in order to accelerate their practical implementation.

4.6.1 Integrating Reading into the PMMD

Including the concepts of a reading corner (elementary schools) and school library (post-elementary) as basic elements of the minimum profile as:

- Knowing how to read fluently is key to obtaining good results at school in any subject;
- Good reading abilities in both French and national languages can only be developed through regular access to varied, interesting and stimulating reading materials; exposure to a single textbook is insufficient for learning to read fluently and develop reading habits;
- All pupils should be able to learn to read effectively if they have access to reading materials from the school library;
- In Senegal, school libraries play an even greater role as few parents have the means to purchase books at home- furthermore it can be difficult to source books outside of the capital and regional centers;
- This is in line with the closer integration of national languages into the learning system.

4.6.2 Launching a Reading Corners Program

A reading corner program at the elementary level will spearhead faster learning to read at a younger age:

- A reading corner can be defined as a section of a classroom that holds books and other reading materials;
- Whether this is in the form of a bookcase, a cupboard, a case, or a table, the reading corner should keep its content protected from theft, dirt, moisture, and mess;
- As far as possible, a reading corner should have enough space around it to allow the youngest pupils to easily access the books and choose the ones they would like to read;
- In classes with a large number of pupils, it is up to the teacher to organize it so that each child can consult the reading corner and take whatever books interest them;
- In classes with a small room and with a small number of pupils, the teacher could pick books from the reading corner and hand them out to pupils - if necessary, the teacher should check that each child was able to obtain the book they wanted to read or look at;

- Experience proves that if reading books are stored in rooms central to the school - in the school library or locked in the principal's office or home – it significantly reduces the likelihood of the books being used by pupils on a daily basis;
- For greater effectiveness, time should be set aside for regular and dedicated use of the reading corner; various activities could be organized around this, from individual reading to groups reading out loud or reading out stories written by pupils, etc. Short-term borrowing of titles from the reading corner should also be encouraged.

4.7 Scenarios for Procurement and Funding for General Intermediate and Secondary Teaching

Textbook tendering systems are currently focused on elementary teaching. Despite the fact that Senegalese publishers already produce post-elementary textbooks, the preponderance of publishers in the north - and the subsequent cost of acquiring textbooks - grows significantly beyond CM2. In this context, it would be helpful for the MEN to adopt a rational and recurrent textbook procurement system for general intermediate and secondary textbooks. Two solutions could be used, with the same timescales and following the same textbook selection procedures as for elementary teaching.

4.7.1 Procurement Based on a Grant per Student

The consumer-based financing model allows for establishments to purchase directly from bookstores or a centralized MEN depot. This purchase would go hand in hand with the modulated financial support provided by the MEN to post-elementary establishments. This provides potential for to-be-defined parental contributions to “special textbooks”. Additionally, the creation of an approval list to keep costs to a reasonable level

4.7.2 Revolving Textbook Funds

A Fonds tournant de Manuels (Revolving Textbook Fund). A Revolving Textbook Fund (FTM) is a school textbook financing mechanism in which annual book acquisition expenses are funded by the revenues generated each year through loan contributions. It can be administered at various levels: school, IEF, IA, or even national level.

In a textbook loan system organized at the school level, pupils pay the school a contribution which gives them the right to borrow a set of textbooks corresponding to their year of study. After several years, all of these contributions could be enough to finance the cost of completely - or partially - replacing the inventory of textbooks. This loan system could either be entirely self-financing or supplemented by a grant.

- *Self-financing.* The amount of the contribution is key. It is calculated based on criteria relating to the lifetime of the book and thus the number of pupils who will use the book. It would also be appropriate to include inflation coefficients caused by the probable increase over a period of three or four years in the cost of primary materials (particularly paper) and labor. It is important to

remember that the purpose of these contributions is to finance the acquisition of a completely new set of textbooks in the mid-term.

- Subsidized system. In this case, parental contributions partially cover the costs, with the rest financed by the state and/or PTFs. For example, if in a school the parents must - supposing that they are the only ones paying - make a total contribution of 20,000 CFA for a full set of textbooks, any potential top-up from the MEN/PTFs would allow the parental contribution to be reduced by 10,000 CFA (100% top-up) or 15,000 CFA (50% top-up), etc.

a) *The key steps for establishing an FTM are as follows:*

- Calculation by the MEN of textbook procurement costs over a period of four to five years.
 - Definition of a ratio of textbooks to pupils
 - Calculation of the cost of teaching guides
 - Setting the expected lifetime of a textbook
 - Calculation of the loss and damage rate to include in the equation
 - Inclusion of the rate of inflation (as this involves calculating the cost of replacing the textbook after 4 or 5 years)
- The MEN will set the required level of annual contributions
 - Generally, these will vary according to the year of study
 - They may be agreed per title or per full set of textbooks
 - These contributions must be collected from parents/pupils after including any support provided in the form of subsidies by public authorities/PTFs.
- Official announcement of the amount of contributions and a publicity campaign launched about them
- In each school, announcement of the required amount of contributions (thinking of the poorest families for whom a compensatory system should exist, with the financial support of public authorities/PTFs).
- The establishments collect the contributions
 - From parents/pupils
 - Per semester or for the entire school year
 - Consider the effective payment period for parents
- Establishments send the contributions collected at their level to the national textbook loan fund
 - To a dedicated bank account
 - Through the IEFs/IAs

b) *Creation and operation of a high-performance FTM*

FTMs undoubtedly represent the ideal procurement system for school textbooks from post-elementary level. They do however require particularly rigorous management:

- Careful attention paid to the actual design of the FTM, with no fear of going into fine detail
- Secure methods for collecting, paying, and holding funds
- Full training cycles (financial management, management of materials within school establishments)
- Close supervision, particularly in the first few years
- Constant financial monitoring

- Adjusting the amount of contributions; the MEN must not hesitate to increase the cost of contributions - unpopular though it may be - in order to maintain the potential purchasing power of the textbook fund
- Maintain a high rate of effective return on contributions
- Pressure on prices thanks to the adoption in parallel of an approval list for a limited number of titles (fewer titles means higher circulation of each of them, and thus lower unit prices)
- Schedule for introducing the FTM at the rate of one level of study per year over a period of five years, in tandem with the introduction of the new programs, which will help reduce costs.
- Initial investment by public authorities/PTFs is essential for getting the fund off to a good start.

c) *How would an FTM really work in Senegal?*

While the number of textbooks that would be required per year of post-elementary study is not currently known, we can estimate a minimum of eight, with a unit price of around \$7 USD (supposing they are produced in-country, with imported textbooks costing much more). A full set of post-elementary textbooks would thus cost \$56, around 32,000 F CFA, per year per pupil. This would require a level of financial commitment that is out of reach of most Senegalese families, particularly those with several children above the level of CM2.

This is why the establishment of the FTM in each intermediate and secondary education establishment appears to be the best way to enable each pupil to have access to a full set of textbooks at a feasible price (an annual loan fee). The initial cost for establishing an inventory can thus be depreciated over the life expectancy of the textbook (which can be estimated to be six years in Senegal). Supposing that the public authorities prefer that there is a single, centralized point of management for an FTM, it seems that an institution such as the MEN's Fonds d'Education (Education Fund) would be capable of taking on the management of such an FTM.

When calculating the cost of loan contributions, parameters such as the likely cost of replacement due to wear and loss of textbooks, as well as replacement of the entire inventory at the end of the normal expected lifetime of the textbook, should be included. An inflation coefficient is also used. In the case of Senegal, this gives the following formula and results:

Example calculation of an annual loan at post-elementary level

Annual loan =

Unit cost per set of textbooks x Annual rate of loss x Inflation x Estimated increase in pupils

Predicted lifetime of a textbook in years

$$\frac{(\$7 \times 8) \times 1.05 \times 1.1 \times 1.1}{6} = \mathbf{\$11.85 \text{ per year per pupil, at least 6,800 F CFA per pupil/per year}}$$

It is evident that the annual individual contribution would be equivalent to the cost of purchasing just two textbooks. The increase in the number of pupils, which could potentially be quite high, would be compensated for by the additional contributions paid by newcomers, which would mathematically allow for the purchase of the additional copies required for this increase in pupil numbers.

Generally, such funds become self-sustaining in the space of five years. Assuming it is introduced in Senegal for the 2020/2021 school year, this would mean that from 2025 the supply of school textbooks

at post-elementary level in the country would be entirely self-financed, without depending on subsidies from the state and/or PTFs.

4.8 Decision-Making Structures for Teaching Materials at MEN and INEADE Level

4.8.1 Broadening the Remit and Means of the INEADE Textbook Division (DMS)

Currently, tenders and their evaluation are managed through the INEADE textbook division. It could be foreseen that, in order to better manage this book supply chain that involves several billions of F CFA per year, the remit and means of this division should be expanded both upstream and downstream.

This expanded textbook division would serve as the executive management for the activities of INEADE, the elementary teaching department, and DAGE.

This expanded division would be responsible for:

- Supervising publishing tenders launched by the MEN;
- Monitoring the overall cost of procuring school books;
- Checking the performance of publishers/textbook distributors;
- Collecting - in collaboration with the DPRE - data on textbook/pupil ratios out in the field;
- Organizing the disbursement of funds needed for the purchase of teaching materials;
- Organizing awareness and information campaigns for schools, parents and the general public;
- Producing and managing management and information materials, as well as drafting all documentation relating to the books policy;
- Forming relationships with IAs/IEFs, school establishments, the private publishing sector, the other MEN departments, and PTFs;
- Monitoring and evaluating the effective use of the teaching materials.

Though we are aware of the current administrative hierarchies which make the DMS “only” a division of INEADE, in our opinion it would be beneficial to ensure that this improved DMS would be situated in an equal hierarchical standing with the other DAGE-type MEN departments, which would reflect its transversal aspect. This would endow it with the authority for the budget it would have available, supplied by the Senegalese public authorities and PTFs.

4.8.2 Relations with other Senegalese and International Public Entities

a) *Ministry of Finance*

An expanded DMS under the management of INEADE could work with DAGE in collaboration with the Ministry of Finance for the disbursement of funds from the national budget and PTFs. Moreover, the creation of a dedicated account for teaching materials would ensure the capture, visibility and security of these funds. In particular, it would be important to establish systems designed to ensure that, regardless of the source, these funds are paid on time to the teaching materials account according to a previously-defined schedule.

b) The MEN Department of General Administration and Equipment (DAGE)

The DMS, under the management of INEADE, would be the interface with DAGE in the event that the MEN opts for a decentralized budget at school level for the acquisition of teaching materials as a solution. The DMS would then need to provide DAGE with exact information on the bank details of each establishment, which is key (with exact pupil numbers) for the smooth operation of a new teaching materials funding model in Senegal.

c) DPRE (Department of Educational Reform and Planning)

It remains clear that the collection of statistical school data remains the prerogative of the DPRE. However, in order to prevent any loss or distortion of data during its transfer from the DPRE to the DMS, the DMS would need to establish a fast, effective and reliable transfer of information with direct access to the data and projections provided by the DPRE, through which the DMS would then - under the direction of INEADE and in accordance with the action plans established by MEN - work with DAGE to create precise budgets and inform the PTFs of future financial needs for teaching materials.

d) Partenaire Technique et Financier (Technical and Financial Partner)

The DMS would be in contact with the PTFs about their future financial contributions. In other words, at the beginning of the school year, the DPRE would receive and verify the numbers of pupils, and the DMS and DPRE would together share this with the PTFs to allow them to budget their support for the year $n+1$. Furthermore, the DMS would need stringent accounting in order to respond to any potential auditing by the PTFs.

e) Association Sénégalaise des Éditeurs (Senegalese Publishers' Association)

The DMS would need to address any publishers wishing to be informed about the schedule and the amount of funding available - which would translate into training, if needed. The DMS would check to what extent publishers were adhering to the minimum production specifications and the prices indicated in the approval list.

Table 5: Summary of recommendations

| ADOPTING AND LAUNCHING THE PROPOSED REFORMS | | Entity responsible |
|--|--|---------------------------|
| Focus 1 | Adoption of new textbook acquisition principles | MEN |
| Principle 1 | Decentralization of budgets and selection of teaching materials at school level | |
| Principle 2 | Creation of a Liste officielle des Matériels didactiques agréés [Official List of Approved Teaching Materials] (LOMDA) containing three or four titles per discipline and per level | |
| Principle 3 | Creation of a mechanism for the distribution and payment of textbook and non-textbook teaching materials (including any revolving funds for post-elementary) | |
| Focus 2 | Expansion/Creation of new entities at MEN | MEN |
| 2.1 | Expansion of the DMS at INEADE and training of its staff | |
| 2.2 | Creation of the Commission d'Approbation des Matériels Didactiques [Teaching Materials Approval Commission] | |
| Focus 3 | Launch of the reform project | INEADE |
| 3.1 | Selection of the launch date | MEN, INEADE |
| 3.2 | Creation of detailed procedures and documentation needed for successful implementation of the new books policy | INEADE, CEAM |
| | Creation of a decentralized textbook selection and ordering system at school level (with any related documentation) and drafting of training modules for local education authorities and schools. If a positive decision is made regarding the FTM: development of an action plan for implementing the FTM in secondary | |
| | Creation of a unique textbook submission, evaluation and approval system (supported by evaluation methodology, rating system and management manual) and drafting of training modules for managing and evaluating a tender | |
| | Development of a teaching materials ordering system at school level, including a strategy for transmitting from paper systems to electronic systems | |

| | | |
|----------------|---|--------------|
| 3.3 | Development of a five-year tendering calendar and publishing of a basic minimum profile for teaching that will be subject to agreement between the various partners. | INEADE, CAMD |
| 3.4 | Design of a decentralized distribution pilot project – including all related documents and the development staff training modules | INEADE |
| 3.5 | Selection of IAs in which the new distribution model can be trialed | INEADE |
| 3.6 | Development of an exhaustive training program and management manual to improve capacity in certain fields, including: tender procedures, design and creation of a LOMDA, selection and ordering of teaching materials at school level, management and storage of teaching materials, etc. | INEADE |
| 3.7 | Training of target partners in the procedures and documentation described above | INEADE, CAMD |
| Focus 4 | Project monitoring and expansion | |
| 4.1 | Development of an impact evaluation and monitoring system with performance indicators and data collection methods | INEADE |
| 4.2 | Regular monitoring of pilot IAs | INEADE |
| 4.3 | Modification of the project according to the results of the monitoring | INEADE |
| 4.4 | Rapid expansion to other IAs to eventually achieve nationwide coverage | INEADE |

5 Conclusion

The procurement of teaching materials in Senegal has many characteristics that bring it closer to the international best practices in this area: fair and transparent tendering processes, relative regularity in funding, active cooperation with funders, and a rich and varied national publishing ecosystem. However, it seems that the system has encountered certain barrier. This is evidenced by the worrying development of piracy and the tendency towards oligopoly in Senegalese school publishers. But unfortunately, other similar systems in Africa, which also seemed to safely navigate a calm sea, finally sank through their failure to observe the cracks in their hulls. This is why it seems time for the Senegalese teaching materials procurement system to adopt reforms that will sustain the undeniable advances that have already been achieved. This includes creating a unified management center for the entire book chain and expanding the skills and improving the human resources of the current DMS at INEADE. It further entails simplifying the dual tendering system by refocusing on a single tender, resulting in a list of three or four approved titles per subject and level from which the schools can choose independently. This change would be supported by allotting a teaching materials acquisition budget to schools, consequently empowering them and enabling better distribution and value for money for textbooks. All these reforms, particularly the last, cannot be accomplished in just a few months, but should be considered and discussed at length between partners to ensure a consensus, and therefore a lack of inertia of certain actors at the time of implementation. However, in our opinion, exploring their feasibility is fundamental to a new start for the Senegalese teaching materials procurement system in order to allow it to continue to be the benchmark system for francophone Africa and beyond.

6 Appendices

Appendix I: Financial Aspects of Textbook Procurement: Impact of Printing and Other Inputs into the Final Cost Price of the Textbook

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Perspectives: Each Link in the Book Chain has an Impact on the Cost Price

Effective teaching materials procurement involves a number of activities and inputs of different types - however, these must be made to work and progress together. It is this sequence of activities that is

generally referred to by the term the “book chain”. If one of the links in this chain suffers issues, this malfunction can have an impact on the entire chain.

The main links in the book chain are as follows:

- Development of the curriculum (including the specifications for the minimum profile for teaching materials required for assimilation of the curriculum objectives)
- Technical specifications for the teaching materials (both in terms of durability and presentation)
- Distribution assumptions (textbook/pupil ratios, textbook lifetime, rate of loss and deterioration, etc.)
- Financing policies (basically: “who pays for the materials and how?”)
- Setting of prices (degree of control and how it is applied)
- Authors and publishers (from the development of the manuscript through the pre-publishing stage)
- Production (raw materials, printing, proofreading and finishing)
- Distribution and storage
- Management and care in schools
- Use in class and at home
- Supervision and monitoring of implementation

A whole series of targeted policies and practices could be applied to each of the links in the book chain and these variables would have a profound impact on the design, costs, fair distribution and sustainability of teaching materials systems.

However, it is not purely educational problems or cost effectiveness that motivate school textbook policies. All too often considerations of a more political nature enter the picture, such as:

- The geographical origins of the textbook printing: national, regional, international
- Failure to consider, by many teaching institutes, the financial implications of the curricula they produce
- Lack of knowledge on the part of many education ministries of the level of annual budget commitments required to maintain their teaching materials systems in working condition and to ensure that a minimum level of materials are available - and used correctly - in each school; assuming that they have made the “right” decisions to produce textbooks of adequate content with good value for money in terms of presentation and production, the entire process, development and production costs could be reduced to nothing if a significant proportion of the teaching materials fails to arrive at schools or, even if this is the case, are not used there.

Consequently, any reform of teaching materials must be designed in a holistic fashion. Unfortunately, in many countries, public authorities adopt an approach based on a single factor solution (authors, royalties, printing, distribution, textbooks available at no cost).

Remember that the normal components of the price of a textbook are as follows:

- Pre-publishing: a fixed price which includes the composition, the proof, the CD, etc.
- Production: variable cost including raw materials, printing, proofing, and finishing
- Author remuneration: royalties or a one-off payment
- Publisher’s fixed costs: salaries, marketing, administration, storage, rental and charges, financial expenses, etc.
- Distribution costs
- Profit for the publisher

The textbook prices that we were able to find for various countries often presented a combination of the above components, and consequently comparing them to each other is of little relevance. Three different cases:

- I. The textbook cost prices are mainly calculated based on production costs, which thus do not include raw materials and printing costs in the chain, with a significant “royalties” aspect accorded to the textbook designers, regardless of whether they were already civil servants and remunerated as such.
- II. The cost of textbooks could be equivalent to the acquisition cost (the cost of distributing finished products to a central warehouse belonging to MEN, which is then responsible for distribution to schools). In this case, we cannot say that distribution is included in the cost as distribution only occurs to a central point
- III. The cost of textbooks could be equivalent to the retail price, which includes the costs for delivery to the schools through a network of bookstores/retailers (and thus also the financial impact of the discount to a third-party provider), or through a second tender process for distribution from a central warehouse.

Cost Breakdown: Mission Impossible?

Various configurations

There is no “authorized” version, set in stone, for the breakdown of internal costs that result in the cost of a book. That said, if we compile the figures put forward by publishing specialists or professionals in the sector, we can define percentage ranges that correspond to each of the stages in the book chain. We can thus consider that the internal composition of the price of a textbook directly sold to the MEN would resemble the following:

Table 1: Ranges for the breakdown of textbook costs

| Cost category | Items which include this cost category | Percentage range of the category of the textbook unit price |
|--------------------------|---|---|
| <i>Copyright</i> | Rights paid to authors, translators, illustrators, photographers who have worked on the book, based on a percentage of copies sold | 8–10% |
| <i>Creation</i> | Remuneration of external freelance collaborators based on a single one-off payment (and thus unconnected to sales figures). This category includes people who have worked on: the design, proofreading, sketches, maps, etc. - but also illustration and texts, in the event they were not produced and remunerated based on a percentage of copies sold. | 15–20% |
| <i>Production</i> | Paper, printing, binding, finishing, packaging, transport to a port (from Dakar for Senegal) | 20–25% |
| <i>Promotion</i> | Catalogs, advertising, fairs (through the IEFs in the case of Senegal) etc. | 7–12% |
| <i>Publisher's fixed</i> | Salaries, administration, storage, rental and | 5–2% |

| | | |
|--------------------------|---|--------|
| <i>costs</i> | utilities, financial costs, insurance, etc. | |
| <i>Distribution</i> | Storage, order processing (information processing, invoicing, accounting, etc.) | 8–15% |
| <i>Publisher margins</i> | They are private companies... | 25–45% |
| <i>VAT on textbooks</i> | 0% in Senegal | 0.00 |

- Generally, production costs are considered to represent some 15 - 20% of the retail price of a durable textbook with an expected lifespan of four to five years.
- Raw materials may represent, with quite a wide range, 30 - 60% of production costs - quite a different percentage of course to the total cost price of a textbook. This distinction between raw materials and production may have caused some confusion in the past when identifying perceived supply costs, in the cases where “cost price” and “production price” become confused (typical in the case of state publishing).
- Most of the costs involved in the procurement of textbooks must appear somewhere. State publishing tends to reduce the cost price of the textbook to the unit price of printing; this does however amount to conveniently “forgetting” very real costs such as royalties, editorial formatting, financing, distribution, storage, fixed costs, etc., which do not miraculously disappear and must be included somewhere in the budget.
- What is meant by “distribution” should also be clarified: distribution to a central national depot? Regional depots? To each school? Distribution costs are also dependent on the level of risk incurred by the distributor: as delivery to a single central depot with guaranteed payment by the state/PTFs represents a very limited risk; at the other end of the scale, it is much riskier to distribute textbooks in a competitive system through a network of bookstores (unsold inventory, late or non-existent payments), or by selling directly to schools (mini book fairs, risk of local corruption).

Assuming that every link in the book chain has been carefully examined and effective corrective measures implemented, the system needs to be managed effectively. Producing and supplying books in a developing country is a complex exercise that involves a number of potential handicaps:

- A large number of schools spread across territory that can be difficult to access;
- Heterogeneity in terms of the equipment at schools and in operational environments (roads, climate, density of establishments);
- A high volume and sometimes, a high number, of titles to distribute in different quantities;
- Relative reliability of school enrollment statistics;
- A lack of planning for needs in the mid- to long-term.

Tanzania Case Study

The columns below show a schematic comparison of the price of textbooks from private and state publishers, as well as pirated copies, respectively as they were in Tanzania in 2009⁵. The date may seem slightly out of date, but overall the data relating to the issue has changed little and can be applied to many African countries in 2018.

Of course, this comparison takes the characteristics of a single book from all points of view (formatting, pagination, presentation and physical specifications). The “private publisher” example includes all price components, including costs relating to drafting, production, raw materials, fixed company costs, marketing, royalties, distribution and benefits.

At first glance, costs pertaining to state publishing seem to be much lower - but this is largely due to the fact that they cover only drafting, production, distribution and royalties (many state-published titles do not pay their authors and as a result the cost price of textbooks through this method could be even lower, though one could argue that quality could suffer through the use of unpaid authors). However, production costs for state publishing often have a tendency to be underestimated, insofar as they completely overlook operational costs (unlike the case with a private publisher). Yet, for an equivalent textbook, it can be noted that a private publisher uses far fewer people than its public counterpart; the inclusion of all staffing costs alone would greatly increase the cost of a state-published textbook.

The column for pirated editions is also quite edifying:

The cost price of such a textbook includes only production, raw materials and distribution costs.

Drafting is “free” as it is stolen from the original publisher

Royalties and copyright are “free” as the pirate does not contribute to the intellectual property

No marketing costs arise because pirates, by definition, only copy “bestsellers” which have already been successful on the market.

Fixed costs are negligible, as pirates are very small organizations

Production costs less than a non-pirated edition as the pirates have no concern regarding sustainability, but are more interested in the short term as, by definition, there is no “after-sales” service or concerns about company reputation.

Distribution also includes few overheads, as the pirates have no ambition to provide exhaustive coverage to an area and are only interested in “easy” markets such as urban centers.

Therefore, when all these “inconsequential” costs are eliminated, the pirated edition has no issues marketing a price some 35% below a legally-produced edition, whilst making profits 250% higher than a publisher with a storefront would make for the same type of title. It is thus unfortunately easy to see why parents and/or schools are relatively unconcerned about the legality of the textbook when faced with the savings that the pirated edition can provide.

Beyond this consideration of the prices compared between various editions, Tanzania in 2009 provided the basis for studying the thresholds at which printing becomes cheaper, as well as the limits for such thresholds.

⁵ Source: The future of our children’s education - Providing the best textbooks for the next generation. A review of the issues and implications of State versus commercial and single versus multiple textbook provision in Tanzania. Tony Read /DFID, 2010.

Table 3: Textbook price comparison according to volume

| | | |
|----------------------------|------------------------------|----------------|
| Specifications | | |
| Format | 173 x 240mm | |
| Pagination | 144 pages | |
| Printing | CMYK color printing paper | |
| Paper | 80 gsm | |
| | 260 gsm single-sided UV card | |
| Cover | Coating | |
| Binding | Stitched, 8mm gutter | |
| Volume | 50,000 | 300,000 |
| Cost | kUS\$ | kUS\$ |
| Creation | 2 | 2 |
| Raw materials + Production | 20 | 123 |
| Royalties | 7.50 | 45 |
| Distribution | 33.8 | 202.800 |
| Fixed costs | 56.3 | 67.6 |
| Profit | 0.0085 | 67.600 |
| Total cost price | 131.562 | 704.1 |
| Unit cost price | 2.63 | 2.34 |

The table above looks at the relationships between the cost of printing and volumes. Current printing equipment makes it possible to balance the volume at around 30-40,000 copies for a full-color book, and less than 10,000 copies for a two-color or monochrome book.

Table 4: Volume and economies of scale

| | | | | | | | | | | |
|-------------------|-----|------|------|------|-------|-------|-------|------|------|------|
| Number of copies | 500 | 1500 | 2500 | 3500 | 4500 | 5500 | 6500 | 7500 | 8500 | 9500 |
| | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Unit price (US\$) | 2 | 1.6 | 1.35 | 1.17 | 1.075 | 1.025 | 0.975 | 0.93 | 0.92 | 0.91 |

Preparing a Publishing Budget

Based on the factors and criteria listed above, a publisher would need to draw up a provisional publishing budget, which would be limited to a series of questions that would better outline the publishing budget which the publisher would use (or not, in detail, if the conditions are not met).

Specifications

This first questions the publisher should ask themselves are:

- What sort of work am I going to publish?
 - Just a textbook?
 - A textbook with a teacher's guide / exercise booklet / CD / CD-ROM?

- Another type of book?
- Format?
- Pagination?
- Number of colors?
- Illustrations/diagrams/graphics?
- Hardback or paperback?
- Binding?
- Weight?

Many of these criteria will be determined by the market which the book is destined for.

Creation

- Who will work on:
 - The manuscript?
 - The proof?
 - The illustrations, diagrams, and graphics?
- This all needs to be budgeted for, as well as:
 - Royalties
 - Fees
 - Etc.

For a publisher, time is money

- Internally, how much time will be dedicated to:
 - Editing?
 - The proof?
 - Pre-press operations?

Fixed costs / variable costs

- Fixed costs are those relating to the creation of the book:
 - Editing
 - Proof
 - Author fees
 - Reproduction rights (for the text and illustration)
 - Illustrator fees
- Variable costs which depend on the volume and other factors:
 - Production (paper, printing, and binding)
 - Promotion
 - Royalties

Pricing form (bookstore sale)

- Title: CEI Mathematics
- Date: June 18, 2018
- Currency: US\$
- Volume: 8,000
- Price: 9
- Discount: 45%
- Net revenue: 39,600
- **A** = Production: **7,760**
- **B** =
 - *Editing*: 4,000
 - *Proof*: 3,000
 - *Illustration*: 2,400
 - *Promotion*: 1,800
 - $\sum B = 11,200$
- *Gross margin*: 20,620
(% = 52.12%)
- *Royalties*: 10% of net revenue
= 3,960
- *Margin after royalties* = 16,680
= 42.12%

Remember fixed costs

- The management of the publisher will determine the level of net profit required to cover the company's fixed costs
- These fixed costs are:
 - *The salaries of permanent staff*
 - *Premises + cleaning + maintenance*
 - *Water, gas, electricity*
 - *Financial costs*
 - *Depreciation of assets (furniture, computers, etc.)*

Open International Printing vs. Protected National Printing

Printing is a key step in the textbook production process. But ultimate responsibility for the physical quality of the work falls to the publisher (which decides on which printing press to use and under which financial conditions and timescales it will be printed). When a publisher wins a tender to publish a title or holds the rights to such, international practice allows the publisher to select the printer, according to financial and quality considerations, based on previous work it has commissioned.

If the printing of all the textbooks is to be reserved for national printers, this amounts to creating a monopoly, or more precisely, an oligopoly. This results in higher textbook cost prices for the sponsor, namely the Senegalese government/PTFs (and thus an indirect subsidy granted to these printers at the expense of more teachers, more schools, more textbooks, better salaries, etc. that fall within MEN's

budget). MEN will be “forced” to use national printers to some extent, regardless of cost, quality and service levels.

Protected national printing for schools is not a service to users of textbooks and the organizations that finance them. There are multiple reasons for this:

- The customer relationship and the price will suffer in an oligopoly and the guarantee of continuing work.
- A good printer maintains their equipment, invests in new machines to improve their competitiveness, and makes optimal use of their machines. However, in the case of a protected market, why make such investments when the work is guaranteed (even in the event of “competition,” as cartels can quickly form, such as in Chad and Madagascar)?

For example, in Sudan (December 2015), a World Bank contract demonstrated just how uncompetitive protected national printing is and in the end users lost millions of dollars:

| | | | | | | | |
|---|-------------------------------|-----------|--------------|------|-------|--------------|-----|
| 1 | Hanoi Printing Joint Stock Co | Hanoi | Vietnam | EURO | Lot 1 | 420,394.83 | N/A |
| | | | | EURO | Lot 2 | 251,388.00 | |
| | | | | EURO | Lot 3 | 325,074.48 | |
| | | | | EURO | Lot 4 | 593,453.64 | |
| | | | | EURO | Lot 5 | 409,796.20 | |
| 2 | Alwan for Printing | Riyadh | Saudi Arabia | EURO | Lot 1 | 312,309.69 | NA |
| | | | | EURO | Lot 2 | 489,780.45 | |
| | | | | EURO | Lot 3 | 601,517.93 | |
| | | | | EURO | Lot 4 | 1,138,070.48 | |
| | | | | EURO | Lot 5 | 772,100.95 | |
| 3 | Gega Integrated Business | Khartoum | Sudan | | Lot 1 | NA | NA |
| | | | | | Lot 2 | NA | |
| | | | | USD | Lot 3 | 1,807,059.34 | |
| | | | | USD | Lot 4 | 2,580,078.96 | |
| | | | | | Lot 5 | NA | |
| 4 | Pitambra Books Pvt Ltd | New Delhi | India | EURO | Lot 1 | 559,108.60 | N/A |
| | | | | EURO | Lot 2 | 335,325.22 | |
| | | | | EURO | Lot 3 | 469,291.78 | |
| | | | | EURO | Lot 4 | 781,859.39 | |
| | | | | EURO | Lot 5 | 570,449.95 | |
| 5 | Lovely Offset Printer | New Delhi | India | | Lot 1 | NA | N/A |
| | | | | | Lot 2 | NA | |
| | | | | USD | Lot 3 | 593,196.46 | |
| | | | | USD | Lot 4 | 1,109,167.43 | |
| | | | | | Lot 5 | NA | |

Protected national printing will always be more expensive than printing carried out through international printing platforms (large printers in India, Europe, the Gulf and south-east Asia) because:

- Printing school textbooks requires short-term availability / enormous stocks of paper and other inputs, and thus significant financial investment, which is rarely within the scope of national printers.
- Protected national printers lack the highly-developed skills of forward planning that are found in the international mega-printers.
- Protected national printers, being small-scale, have a tendency to print in a “linear” fashion (each title is produced following the other, without the parallel printing which is the prerogative of the international printing platforms), which causes additional problems:
- Need for good storage conditions
- Capital is immobilized for several months

International Comparison of Textbook Cost Prices

The cost of procuring textbooks varies considerably from one country to another and according to the level of education the teaching materials are destined for. This is why high school level generates textbooks at a higher cost than those for junior high level, which itself is more expensive than elementary, due to the lower number of pupils and wider range of subjects.

The factors that determine the procurement cost are:

- The number of pupils
- The number of books required for the class (which largely depends on the national curriculum)
- The unit price of the textbooks
- The expected lifespan on the manuals (determined by the level of the required technical expectations)
- The ratio of textbooks/pupils

The annual amortized cost of procurement per pupil is thus expressed through the simple formula below:

The projected cost of procurement of teaching materials can be estimated by using/adapting the following simple formula⁶:

$$\frac{a \times b \times c \times d \times e}{f \times g}$$

- a* = Number of pupils in elementary
b = Number of textbooks required
c = Unit cost of a textbook
d = Annual rate of loss/deterioration
e = Number of teacher's guides
f = Expected lifespan of the book
g = Target number of books/pupil

⁶ This formula only considers the pupil textbooks and teacher's guide for elementary level, but it can easily be modified to include library books, extra-curricular materials, etc. We can also use the same calculation for pre-school and post-elementary.

Unit price of textbooks in 9 African countries (2011)⁷

Table 5: Unit Price for the first year of elementary school

| Country | Number of titles required | Unit Price (average) (US\$) | Cost of a full set of textbooks (US\$) | Predicted lifetime of a textbook | Target ratio of textbooks/pupil | Annual cost of a full set (US\$) |
|---------------|---------------------------|-----------------------------|--|----------------------------------|---------------------------------|----------------------------------|
| Benin | 6 | 2.70 | 16.20 | n/a | 1/1 | n/a |
| Burundi | 9 | 1.00 | 9.00 | 2-3 years | 1/1 | 3.00-4.50 |
| Cote d'Ivoire | 3 | 3.00 | 9.00 | 1 year | 1/1 | 9.00 |
| Kenya | 8 | 3.80 | 30.60 | 4 years | 1/1 | 7.65 |
| Madagascar | 8 | 0.75 | 6.00 | 2 years | 1/1 | 3.00 |
| Mali | 3 | 4.50 | 13.60 | 2-3 years | 1/1 | 4.53 |
| Namibia | 3 | 25.00 | 75.00 | 5 years | 1/1 | 7.50 |
| Rwanda | 4 | 2.50 | 10.00 | 4 years | 1/1 | 2.50 |
| Chad | 2 | 5.00 | 10.00 | 1 year | 1/1 | 10.00 |
| Average | 5 | 5.36 | 19.93 | 2.86 | 1/1 | 5.90 |

Table 6: Unit Price for the sixth year of elementary school

| Country | Number of titles required | Average unit price (US\$) | Cost of a full set of textbooks (US\$) | Predicted lifetime of a textbook | Target ratio of textbooks/pupil | Annual cost of a full set (US\$) |
|---------------|---------------------------|---------------------------|--|----------------------------------|---------------------------------|----------------------------------|
| Benin | 6 | 2.60 | 15.60 | n/a | 1/1 | n/a |
| Burundi | 10 | 1.00 | 10.00 | 3 years | 1/1 | 3.33 |
| Côte d'Ivoire | 7 | 4.00 | 28.00 | 2 years | 1/1 | 14.00 |
| Kenya | 7 | 4.20 | 29.40 | 4 years | 1/1 | 7.35 |
| Madagascar | 8 | 0.75 | 6.00 | 2 years | 1/1 | 3.00 |
| Mali | 4 | 5.50 | 22.00 | 4 years | 1/1 | 5.00 |
| Namibia | 7 | 25.00 | 175.00 | 5 years | 1/2 | 17.50 |
| Rwanda | 5 | 3.50 | 17.00 | 5 years | 1/1 | 3.50 |
| Chad | 5 | 6.00 | 30.00 | 1 year | 1/3 | 10.00 |
| Average | 6.6 | 5.84 | 37 | 3.25 | 1/1.4 | 8.02 |

⁷ Source: Where Have All the Textbooks Gone: The Affordable and Sustainable Provision of Teaching and Learning Materials In Sub-Saharan Africa (Washington, DC: World Bank, 2015) - Tony Read, Vincent Bontoux.

The most obvious contrasts in the tables above can be seen in the average unit price of a textbook, for example between \$25 USD in Namibia and only a single dollar in Burundi. In Burundi, such a low price is achieved because only the prices of raw materials and printing are included, while all other costs, just as real but hidden, are excluded. Furthermore, the 2011 Burundi textbooks presented a *minima* technical specification, which meant their lifespans were short and they were printed in two-tone colors. These books were reprints of textbooks from the 1980s, and thus out of date with the current Burundian curriculum; their presentation is old, and their level of French much too high. It should be noted that in 2015, the CTB financed a new regional publishing, printing and distribution reform contract, which resulted in much better value for money (around \$1.3 USD went to 120 Burundian communities).

Namibia demonstrates the opposite. Until 2011, the valuation and selection process for textbooks lacked stringency (insofar as no tender had ever been rejected) and included no financial bid from the tenderer. To clarify, the publishers were free to set their prices as they desired. The textbooks were produced according to European standards, in CMYK of course, despite a number of pupils that were both limited and disparate (500,000 pupils in elementary and junior high, 13 teaching languages). The terrain and distances to be covered in this large desert country complicate matters, and thus increase the price of distribution. There were also issues with the provision of funds by the ministry for the acquisition of textbooks, which restricted publishers to waiting until the last minute to print their books - and last-minute work increases printing costs. In 2014 a new tendering system was introduced that restricted the approval lists to three titles per subject and per level and introduced price as an evaluation criterion. Result: unit prices plummeted and are now between \$1.50 and \$2.50 USD including distribution to each school.

We can also see significant differences in the number of titles required: from nine in Burundi down to two in Chad (at the time, in 2018 this varies between two and four in Chad, according to the region and PTF program).

A further key factor: the expected lifespan of the textbook, which varies from five years in Namibia to only a year in Côte d'Ivoire and Chad, to four in Kenya and Rwanda. Some unit prices (Kenya, Rwanda, Namibia) include delivery to schools, but this is far from being the case everywhere. With regard to ratios, officially this is 1/1 almost everywhere, but generally this is far from the case out in the field.

The result of these differing national policies is that the average amortized procurement cost per pupil for the first year of elementary varies from \$2.50 USD in Rwanda to \$9 USD in Côte d'Ivoire. And these differences are found in other classes. For example, for the 11th year, the Burundian curriculum required fifteen textbooks in 2011, while Rwanda required sixteen, with only six titles required in Côte d'Ivoire.

In summary:

- The cost price of a textbook is not the be-all and end-all of quality and sustainability in the procurement of teaching materials. Other factors must also be considered, such as the number of textbooks required, the expected lifespan of the textbook, and textbook/pupil ratios.
- The way in which the curriculum of each country is designed and applied has a profound effect on the overall procurement cost of teaching materials (particularly with regard to the number of textbooks required) - however, this financial impact is almost never considered when developing a new curriculum.
- Large differences can be seen between different countries in terms of the textbook unit price, procurement policies, and the amortized cost per pupil of this procurement. It is therefore clear that the relative significance of these basic factors in the cost of procurement systems is not really known in most countries or even by PTFs, and that the majority of these systems would benefit from more in-depth consideration further upstream.

- Elementary textbooks generally benefit from state funding, although these budgets are rarely sufficient, regular, or planned.
- The funding of junior high school textbooks is often based on parental contributions, and this is despite most parents lacking the means to meet this cost.
- Some textbook evaluation and approval systems operate in complete ignorance of the tender's financial offer. In some cases the technical specifications are also missing from these evaluations - despite being key to obtaining a minimum lifespan and therefore good amortization of this quite considerable investment. We thus cannot emphasize enough the importance of including these financial factors, direct and indirect, in the evaluation and approval systems, to ensure that states (and PTFs) can exercise control over the long-term impact of these factors on the general procurement cost of teaching materials.

Appendix 2: Public Tender Code 2014

<http://www.droit-afrique.com/upload/doc/senegal/Senegal-Code-2014-marches-publics.pdf> (in French)

Appendix 3: Example of an International Tender for the Awarding of a Framework Agreement

International call for tender for the awarding of a framework agreement concerning F_CASD_209 “Acquisition de manuels scolaires de la 1^{ère} étape du Curriculum de l’Éducation de Base en Approche Par les Compétences (CEB/APC)” (Acquisition of school textbooks for the first stage of the Competency-Based Basic Education Curriculum).

1. This international call for tender was made following the Avis Général de Passation des Marchés (General Procurement Notice) placed in the “Le Soleil” newspaper issue no.13959 of Wednesday December 7, 2016.
2. The National Ministry of Education (MEN) obtained a Consolidated Investment Budget (BCI) in 2017 and credits from the Canadian development agency to finance the Programme d’Investissement dans l’École Publique au Sénégal [Senegal Public School Investment Program] (PIEPS/AMS), and the intention to use some of these credits to make payments for the contracts awarded following the framework agreement concerning the “Acquisition of school textbooks for the first stage of the Competency-Based Basic Education Curriculum (CEB/APC)”.
3. The purpose of this process is to enable the National Ministry of Education to select from a pool of suppliers that meet the qualification criteria to supply school textbooks and learning materials for APC.
4. The National Ministry of Education invites sealed bids from eligible candidates that meet the required qualifications for the supply of textbooks and user guides to the fifty-nine (59) Inspections de l’Éducation et de la Formation (Education and Training Inspectorates) (IEFs) in two (2) distinct and separable lots by IEF entitled:
 - Ø Lot 1: Mathematics
 - 384,415 CI mathematics textbooks
 - 347,631 CP mathematics textbooks
 - 24,013 CI/CP mathematics user guides
 - Ø Lot 2: Language and communication
 - 384,415 CI Language and Communication textbooks
 - 347,631 CP Language and Communication textbooks
 - 24,013 CI/CP Language and Communication user guides
5. The framework agreement will be awarded through an international call for tenders in accordance with decree no. 2014-1212 of September 22, 2014 concerning the Code des Marchés Publics [Public Contracts Code].
6. Interested candidates may obtain information from the address below:

Secrétariat de la Division des Marchés de la DAGE, Unité de Coordination des Projets d’Éducation (UCP), Bd. Martin Luther King x rue des Dardanelles email: dageme@orange.sn, weekdays from 9:30 to 16:30.

7. The qualification requirements for the framework agreement are:

Ø Financial capacity:

The candidate must provide evidence that they meet the below requirements:

- Submit a line of credit certificate issued by an approved financial establishment; for a minimum amount of:
 - - Lot n°1: 175000000 F CFA
 - - Lot n°2: 175000 000 F CFA
- Produce financial statements for the last three years (2014; 2015; 2016) certified by an ONECCA-qualified accountant for national publishers and an authorized organization for foreign publishers, that demonstrate the company's stable financial situation.

Ø Technical ability:

The candidate must prove and document that they meet the following requirement:

- That its company's principal activity is the publication of books or, at the least, that it is growing in the book publishing sector.

Ø Experience:

The candidate must prove and document that they meet the following requirements:

- Have been publishing books for at least thirty-six (36) months;
- Has published at least one (01) title during the last five (05) years.

8. Only candidates who have been notified of the framework agreement are authorized to tender for the subsequent contracts.

9. Interested candidates may obtain a tender pack by making a written request to the director of the Directeur de l'Administration générale et de l'Équipement (DAGE) at the National Ministry of Education (MEN), submitted to the address indicated above with a non-refundable cash payment of fifty thousand (50,000) CFA.

The call for tender document may be collected from the above address or sent by email at the candidate's request.

A call for tender pack is available and may be viewed at the office.

10. Tenders must be submitted to the following address:

Secrétariat de la Division des Marchés de la DAGE, Unité de Coordination des Projets d'Éducation (UCP), Bd. Martin Luther King x rue des Dardanelles by 10:00 UTC on Friday November 3, 2017.

Tenders submitted after this deadline will not be accepted.

Tenders will be opened in the presence of representatives of the candidates in the conference room at the DAGE Secrétariat de la Division des Marchés, Unité de Coordination des Projets d'Éducation (UCP), Bd. Martin Luther King x rue des Dardanelles at 10:00 UTC on Friday November 3, 2017.

The tenders will be valid for sixty (60) days from the submission deadline.

A tender guarantee is required from candidates on submission of a tender for the subsequent contracts, as well as approval of the teaching materials through a memorandum of understanding signed with the MEN.

A preferred margin of 15% will be applicable in accordance with the provisions of Article 50 of decree no. 2014-1212 of September 22, 2014 concerning the Code des Marchés Publics [Public Contracts Code].

Signed in Dakar, 09/19/2017

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Directeur de l'Administration Générale et de l'Équipement
(Department of General Administration and Equipment)

Appendix 4: Ministerial Decree No. 3915 Me Dated June 12, 2002 Regarding the Creation and Organization of School Textbook Management Bodies

Article 1. - The following bodies are created as part of the new textbook policy options:

- A national steering committee;
- A regional steering committee;
- A departmental coordination committee;
- A local management committee;
- A local management office.

Art. 2. - The missions of the national steering committee are: to define the direction of the MEN publishing policy;

- To ensure the implementation and monitoring of national strategies in terms of the ministry's publishing policy;
- To inform and mobilize the technical and financial partners around the program as needed;
- To suggest any regulatory measures for the strategic management of the textbooks to optimize results on a national, regional and local level.

Art. 3. - The national steering committee comprises:

Chair: Minister of Education

Members:

- The director of the Institut national d'Etude et d'Action pour le Développement de l'Education (INEADE);
- The director of the Direction de l'Enseignement élémentaire [Elementary Teaching Department] (DEE);
- The director of the Direction de Enseignement moyen secondaire général [Intermediate and General Secondary Teaching Department] (DEMSG);
- Tirector of the Direction l'Administration Générale et de l'Équipement [Department of General Administration and Equipment] (DAGE);
- The director of the Direction de la planification et de la Réforme de l'Education [Educational Reform and Planning Department] (DPRE);
- The director of the Unité de Coordination des Projets d'Education [Education Projects Coordination Unit] (UCP)
- The head of the INEADE Division de l'Édition des Manuels scolaires [School Textbook Publishing Division]

Art. 4. - The national steering committee meets at least twice a year and is convened by its chair.

Art. 5. - INEADE provides the technical support for the steering committee and prepares the sessions.

Art. 6. - The missions of the regional steering committee are:

- To inform, raise awareness of, and mobilize partners and the community around the textbook policy;
- To design strategies to implement the programs;
- To supervise and coordinate the provisioning of the textbooks;

- To inform INEADE, at the beginning and end of each school year, of the implementation status of the school textbooks, and the management and safeguarding procedures for these textbooks.

Art. 7. - The regional steering committee comprises: Chair: Academies Inspector Members:

- Departmental inspectors for the school district
- Heads of parent associations pupils (1 per Inspection Départementale de l'Education Nationale [Departmental Inspectorate for National Education]);
- A representative of the regional council; a representative of the development partners.

Art. 8. - The regional steering committee meets twice per year. It may also hold an extraordinary meeting if convened by its Chair.

Art. 9 - The departmental coordination committee is responsible for:

- Coordinating the various local departmental management committees;
- Informing, raising awareness and mobilizing partners and the educational community at the departmental level around the school textbook policy
- Making known, at departmental level, the strategies and programs defined by the steering committee;
- Informing the Inspection d'Académie, at the beginning and end of each school year, of the implementation status of the school textbooks, and the management and safeguarding procedures for these textbooks.

Art. 10 - The departmental coordination committee comprises: Chair: Departmental Education Inspector

Members:

- A representative of the departmental school principals;
- A representative per town concerned;
- A representative of each teachers' union;
- A representative of the development partners.

Art. 11. - The local management committee is responsible for:

- Applying the programs and strategies defined by the regional steering committee; increasing training in school textbook management and maintenance techniques;
- Suggesting or adapting the textbook management techniques and procedures proposed by the ministry;
- Informing IDEN of the implementation of management and safeguarding procedures for these textbooks.

Art. 12. - The local management committee comprises:

Chair: the school principal;

Members:

- A teacher from the school;
- A representative of the local authorities;
- A representative of the Parents' Association;
- A representative of the Cellule Ecole Milieu;

- A student representative.

Art. 13. - The local management office comprises:

- A Chair: the school principal, manager of the school textbooks;
- A Treasurer: chosen from the teachers at the school;
- A general secretary: chosen by the office.

Art. 14. - The Chair convenes and chairs meetings.

They are responsible for the safeguarding and use of the textbooks.

They manage expenditure and report to the Committee.

Art. 15. - The manager ensures the management of textbooks and resources.

They maintain a record book. The resources generated are paid into a joint account held at a post office bank or mutual savings establishment.

Art. 16. - The general secretary creates reports for the meetings and takes the minutes.

Art. 17. - The local management committee meets 3 times per year and is convened by the Chair.

Art. 18. - The resources of the local management committee come from:

- external support;
- textbook loans.

Art. 19. - Up to date accounts of moneys and materials are kept by each local management committee.

Appendix 5: Extract from PASEC (2014), Paragraph 4.2.2., “School Textbooks”

In low-income countries, availability and use of school textbooks improves pupil performances (Keeves, 1995). These results, while old, show the importance of these teaching tools. Their availability in class is even more important in class when basic teacher training in low-income countries is limited, both in terms of program content and in teaching practices, and a significant proportion of pupils have no books at home.

Graphics 4.24 and 4.25 show information on the availability of reading textbooks and mathematics textbooks at school.

PASEC data collected for the 2013-2014 year does not, however, make it possible to identify if the school textbooks available were old or if they were new textbooks. In 2014, school textbooks for the first and second stages were being distributed to classes and third-stage textbooks had not yet been published. The textbook situation in 2014 thus reflects a transitional period with the spread of the new curriculum and progressive distribution of new teaching materials to classes.

Graphic 4.24: Proportion (in percentages) of pupils according to the number of pupils per reading textbook - Starting school

| Geographic area: | One textbook per pupil | Less than one textbook per pupil |
|------------------|------------------------|----------------------------------|
| North | 21.0 | 79.0 |
| West | 68.3 | 31.7 |
| Center | 92.1 | 7.9 |
| Southeast | 23.9 | 76.1 |
| Southwest | 57.6 | 42.4 |
| National | 61.7 | 38.3 |
| International | 35.4 | 64.6 |

Graphic 4.25: Proportion (in percentages) of pupils according to the number of pupils per reading textbook - Starting school

| Geographic area: | One textbook per pupil | Less than one textbook per pupil |
|------------------|------------------------|----------------------------------|
| North | 27.9 | 72.1 |
| West | 47.8 | 52.2 |
| Center | 36.8 | 63.2 |
| Southeast | 12.4 | 87.6 |
| Southwest | 23.1 | 76.9 |
| National | 37.1 | 62.9 |
| International | 39.5 | 60.5 |

- At the beginning of the cycle, the availability of textbooks is generally better for reading than it is for mathematics in all areas except the north.
- In the second year, the proportion of pupils on a national level who have a reading textbook is greater than (61.7%) than the international average (35.4%). In mathematics, the national average (37.1%) is lower than the international average (39.5%).

Graphic 4.26: Proportion (in percentages) of pupils according to the number of pupils per reading textbook - End of school

| Geographic area: | One textbook per pupil | Less than one textbook per pupil |
|------------------|------------------------|----------------------------------|
| North | 48.0 | 52.0 |
| West | 40.9 | 50.1 |
| Center | 70.6 | 29.4 |
| Southeast | 5.5 | 94.5 |
| Southwest | 18.7 | 81.3 |
| National | 42.3 | 57.7 |
| International | 36.4 | 63.6 |

Graphic 4.27 Proportion (in percentages) of pupils according to the number of pupils per mathematics textbook - End of school

| Geographic area: | One textbook per pupil | Less than one textbook per pupil |
|------------------|------------------------|----------------------------------|
| North | 52.6 | 47.4 |
| West | 50.8 | 49.2 |
| Center | 67.0 | 33.0 |
| Southeast | 10.5 | 89.5 |
| Southwest | 44.5 | 55.5 |
| National | 51.6 | 48.4 |
| International | 41.9 | 58.1 |

- At the beginning of the cycle, the availability of textbooks is almost the same for reading and mathematics in all areas except the south-east.
- Nationally, the proportion of pupils with a reading textbook (42.3%) and mathematics textbook (51.6%) in the last year of elementary is higher than the international average (36.4% in reading and 41.9% in mathematics).
- The proportion of pupils with a school textbook is lowest in the south-east and south-west areas in both subjects, regardless of education level.
- Regardless of education level, in 2014 the distribution of school textbooks among pupils varied between educational regions and subjects. The new distribution of textbooks should take these disparities between educational regions and school levels.
 - Nationally, differences in performance can be observed in the two subjects between pupils who have access to a textbook and those who share them with other pupils in class.
 - The disparities in success nationally between these two categories are largely due to the difference in the scores in the west and south-west regions. On average, pupils in the western region with a reading textbook have reading scores 61 points greater than pupils who share a textbook. In the south-west region, the difference is 72.1 points in mathematics. In other regions, the differences, where they exist, are not significant.
 - Over the next few years, the system will pursue the implementation of the new school textbooks for all pupil cohorts in all educational regions. These new textbooks will be developed using a skills-based approach.

Appendix 6: Publisher Interview Guide

Publishing Company Identity Card

- Publisher contact information - Names of the owner and director - Structure of the publisher and its shareholders - Branches?
- Date founded Specialties?
- Are you an ASE member?
- Number of titles in catalog? Annual titles published per year
- Do you publish titles in Senegalese languages? Quantities? Which languages?
- Do you co-publish titles? How many? With whom?
- Do you buy or sell rights? Please give details (examples) and state any benefits or difficulties.
- Annual turnover - Changes over 5 years?
- Number of staff per role (publishing - commercial - administration - others)
- Authors: profile, recruitment, contract types
- Illustrators: profile, recruitment, contract types

Internal Structure – Selection of Suppliers

- Pre-press: internal/external?
- Printing: internal or external?
- Criteria for selecting your printers? Proximity? Costs? Timescales?
- What are the main printers you work with?
- Breakdown of the costs for a book (e.g. 128 pages / 1 color on one side, 4 on the other)

Sales Policy

- Which distribution networks do you use for sales?
- How many bookstores do you work with regularly? (Do you sometimes directly supply authorities or libraries?)
- Are your titles sometimes included on tender lists? Examples.
- Notes on MEN tendering procedures in Senegal
- Discount bracket used?
- Payment method?
- Sales strategies: Do you participate in book days or book fairs? Sales policy in the context of IEF selections for MEN calls for tender?
- Transportation.
National service providers (within your own country)
To other African countries? To overseas?
- Original initiatives undertaken by the publisher in terms of distribution and promotion

Entities met

Publishers

- Didactikos
- EENAS
- Fermon
- IPAM
- Nara
- NEAS
- Papyrus

- MEN
- INEADE
- DAGE

Appendix 7: Source Documents

L'accès aux manuels scolaires au Sénégal: un défi relevé avec succès! Government of Canada, February 2013

[http://international.gc.ca/world-monde/stories-histoires/2016/access_textbooks_senegal-\(in_French\)acces_manuels_senegal.aspx?lang=fra](http://international.gc.ca/world-monde/stories-histoires/2016/access_textbooks_senegal-(in_French)acces_manuels_senegal.aspx?lang=fra)

Accord-Cadre ouvert de fournitures - Règlement de consultation par appel d'offres international n° F_CASD_209 "Acquisition de manuels scolaires de la 1ère étape du curriculum de l'éducation de base en approche par les compétences (CEB/APC)", September 2017

Arrêté ministériel n° 3915 ME en date du 12 Juin 2002 portant création et organisation des organes de gestion des manuels scolaires – Ministère de l'Éducation nationale

L'édition en langues locales et nationales: quelles opportunités pour l'édition en Afrique? Atelier des Assises internationales de l'édition indépendante, pour faire vivre et renforcer ensemble la bibliodiversité - June 2013 – Ouagadougou, Burkina Faso

Code des Marchés publics, Decree no. 2014-1212 dated September 22, 2014, Republic of Senegal

Demander un appui financier à l'édition d'un livre - "Vos démarches administratives" Government of Senegal, 2018 http://www.servicepublic.gouv.sn/index.php/demarche_administrative/demarche/1/706 Dispositions à l'intention des candidats aux subventions – Ministère de la Culture, Direction des Arts, 2017

Ibrahima LO, directeur du livre et de la lecture: "Les Clac impactent sur les résultats scolaires" Le Soleil, April 23, 2016

PASEC (2016)- PASEC 2014 - Performances du système éducatif sénégalais: Compétences et facteurs de réussite au primaire. PASEC, CONFEMEN, Dakar.

Programme d'Amélioration de la Qualité, de l'Équité et de la Transparence (PAQUET) – Secteur Éducation-Formation, 2013-2015 – Republic of Senegal, Ministère de la Femme, de l'Enfant et de l'Entrepreneuriat Féminin - Ministère de l'Éducation Nationale -Ministère de l'Enseignement Supérieur et de la Recherche - Ministère de la Formation Professionnelle, de l'Apprentissage et de l'Artisanat, February 2013

Promotion du livre et de la lecture: Quelle situation au Sénégal? Goethe Institut Dakar, date unknown
<http://www.goethe.de/ins/ci/abi/prj/les/les/lwa/lsg/frindex.htm> (in French)

Website of the Association sénégalaise des Éditeurs