

# GLOBAL BOOK ALLIANCE



## SUPPLY CHAIN ANALYSIS

# Nigeria Addendum Report Market Analysis Book Survey and Focus Group Discussion Report

December 2022



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## OVERVIEW

The Nigeria SCA Addendum presents Market Analysis Book Survey (MABS) and Market Analysis Focus Group Discussion (MAFGD) reports that probe deeper into the status of essential reading books in the Nigeria education system.

The purpose of the addendum reports was to explore the availability, affordance, and quality of reading textbooks and non-textbook supplementary readers for early grade literacy.<sup>1</sup> The aim was to conduct a more in-depth and nuanced analysis using the market shaping approach that is at the heart of Global Book Alliance in Action Supply Chain Analysis (GBAIA-SCA).

We carried out the MABS and MAFGDs in five locales of Adamawa, Ebonyi, and Sokoto states, (covering urban and rural participant representation); in cities of Ibadan (Oyo State), and in Abuja (Federal Capital Territory) (covering urban participant representation). While the MABS and MAFGD are reported separately, the reports contain references to both processes in terms of how they complement and inform the findings in each report.

### Market Analysis Book Survey—MABS

The market analysis book survey (MABS) was adapted from a 2016 Research Triangle Institute (RTI) book survey and instrument designed for measuring the availability of children’s reading materials in African languages and conducted under the USAID Ed Data II: Data for Education Research and Programming (DERP).<sup>2</sup> The MABS instrument comprised of 23 questions selected and adapted from the original 52 DERP survey questions to verify general parameters of book availability, type, and cost of materials in the research state and city locales.

The survey focused on reading materials relevant for the early primary levels (P1–P4). The target content for this survey included primer or reading textbooks (inclusive of decodable and levelled readers) and associated materials of workbooks and teacher guides, and “supplementary” reading materials (fiction and nonfiction texts). The survey covered reading materials in widely spoken local languages and in English.

### Market Analysis Focus Group Discussion—MAFGD

For the MAFGDs, there were four groups of participants consulted in two Focus Group Discussions (FGDs) in each locale. They were (1) Ministry of Education and Publisher FGD, and (2) Public and Private

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- 1 **Textbooks** - Primer or reading textbooks that can include decodable and levelled readers that are tied to the curriculum; **Non-textbooks** supplementary readers for reading practice, vocabulary acquisition and comprehension - fiction and non-fiction readers not tied directly to the curriculum
  - 2 USAID, RTI, *Survey of Children’s Reading Materials in African Languages in Eleven Countries: Annex G. Summary of the Early Grade Reading Materials Survey in Nigeria, Annex M Survey Instruments, 2016*

Schools and Community FGD (head teachers, teachers, Parent Teacher Association [PTA] and School Based Management Committee [SBMC] members). A semi-structured group discussion protocol was used, centered on four question domains, to stimulate informal discussion with participants so as to clarify their perceptions, understandings, hopes, questions, issues, and recommendations, with regard to:

- reading books demand and supply;
- thresholds for selling and purchasing reading books;
- access to and use of books via traditional (hard copy) and digital (soft copy) technologies;
- priorities for government investment in reading materials.

The focus group discussions were conducted primarily in English, with participants in Sokoto and in Adamawa community groups choosing English and Hausa.

## Data Collections

The Market Analysis Book Survey (MABS) was conducted in parallel with the MAFGD in each of the five locales. The MAFGD participants were invited to bring examples of early-grade reading books to which they had access for the book survey. Following the MAFGD, the facilitators carried out an additional survey in the local marketplace (booksellers, open market stalls). In this way, each survey covered MAFGD participant titles (up to 20 titles) and facilitator open-market titles (up to 10 titles). In all, 133 book surveys were completed by participant and facilitator respondents and, after data cleaning, 129 surveys were analyzed.

The Market Analysis Focus Group Discussion (MAFGD) data were collected by a consultant team of facilitators and co-facilitators in each locale. As facilitators conducted the FGDs, co-facilitators took notes, and each session was recorded with participant permission.

**Limitations:** There were limitations in conducting the combined research— time limitations to conduct the MABS and the MAFGD in one day; geographic limitations in carrying out the activities in five locales of three state and two city seats; and the small number of participants and survey respondents—all limiting the scope of the findings to be representative and generalizable.

A mitigation strategy was to conduct the research activities within the GBAIA-SCA market enhancing approach and framework—bringing together all phases of desk research, interview and focus group discussion, and book survey in a “triangulation” of qualitative and quantitative lenses that can together “provide a confluence of evidence that breeds credibility.”<sup>3</sup> (Bowen, 2009, p.28.)

(The MAFGD and MABS Data Collection Protocols and Analysis Tools can be accessed in Annexes 3 and 4 of the main report).

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3 Bowen, *Document analysis as a qualitative research method*, 28.

## Background Context—Revisiting Themes from the Nigeria SCA Report

Themes explored in the Nigeria supply chain analysis (SCA) main report were investigated further in the Market Analysis Book Survey (MABS) and the Market Analysis Focus Group Discussion (MAFGD). The purpose was to probe deeper into what is working, where are the challenges, and what are the learnings that can improve the availability, affordability, and quality of reading books in early-literacy programs in Nigeria.

The first theme was to explore a deeper, more nuanced differentiation in the supply chain analysis of textbooks and essential reading materials. There is a recognized dearth in the literature on analyzing reading books in the supply chain, which is more often confined to an analysis of textbooks.<sup>4</sup> The textbook dominance has left a crucial gap in understanding the issues and value of reading books. There are quality issues in grasping the type and scope of reading books (leveled and decodable readers, supplementary readers in the form of storybooks, information books, or topic books) seen as essential for early literacy development. And there are quantity aspects in shifting from a “4 to 5 core textbooks per child” standard to considering a “40 to 50 reading books per classroom” standard as an essential condition for improving reading and learning outcomes across the curriculum. The broader frame widens opportunities for building learner literacy skills and for enabling a much sought-after “culture of reading” environment in the early years that was so often cited in the main report as being at the heart of the reading revival in Nigeria.

The second theme was to examine questions of availability, affordance, and quality in providing access to books. In the main report, there were issues raised on universality of access to books between public and private schools, urban and rural areas, and wealthy and poor households. In the introduction to the main report, it was explained how four in ten schools in Nigeria at primary level are private.<sup>5</sup> Baum et al. (2018) note how low-fee private schools in low- and middle-income countries have gained attention in recent years in relation to their provision of “educational services at affordable prices even for the poorest student populations.”<sup>6</sup> However, the authors present questions of parents’ “affordance thresholds” and access to “heterogenous quality” that can represent either “avenues to affordable educational opportunities [or] threats to expansion of educational opportunity.”<sup>7</sup> Defining market thresholds for selling and buying books, exploring the differences in costs and affordability among public and private schools, urban and rural households, and booksellers and purchasers, and asking where and how state intervention is needed to clarify and ensure standards of universal quality access and provision were some of the issues investigated in the MABS and MAFGDs reporting.

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4 R4D and IEP, *Global Book Fund Feasibility Study—Final Report*, 20.

5 UBEC, *National Personnel Audit (NPA) Report on Public and Private Basic Education School in Nigeria*, 205.

6 Baum et al., *Inequality of educational opportunity: The relationship between access, affordability and quality of private schools in Lagos, Nigeria*, 459.

7 *Ibid.*, 460.

The final theme was to take a closer look at the context of national policy on education for language of instruction (LOI) and its enactment in early primary instruction and teaching of literacy. As discussed in the main report, the LOI in Nigeria is the language of the immediate school environment from Primary 1 to Primary 3. From Primary 4 onwards, the LOI transitions gradually to English.<sup>8</sup> The literature suggests a disconnect between policy and practice in schools. In the public and private discourse, Okebukola (2013) goes further, pointing to “deviation from the policy statements” in private schools that adopt English as the LOI from pre-primary classes, in line with parents’ preference, while teachers in public schools “continue with local languages as LOI till the end of primary education [where] pupils have poor background in English.”<sup>9</sup> It is a situation that can lead to deterioration in both languages and that is detrimental to improvement in literacy rates and national development. More recently the 2020 National Early Grade Reading Assessment using the Nigerian Languages (Hausa, Igbo, and Yoruba) speaks of a need to “seek general acceptance of the national policy by parents who expect children to be taught in the English language, rather than to learn English as a subject in the school.”<sup>10</sup> The communication challenge may further require school community acceptance on the value of local language reading materials as tools to teach literacy in lower primary, which would facilitate more effective transition to English LOI in upper primary as required in national policy. As Evans (2020) explains, teaching reading in early primary “in a language that children know and understand [can] facilitate an understanding of the written code and how it works and build the basis for children eventually transferring these skills to reading in English.”<sup>11</sup>

## Summary of Recommendations by Market Analysis Phases

### GBA Recommendations: Market Analysis Book Survey

#### Short term

- That the GBA and partners support FME and NERDC reading awareness campaigns in states, LGEAs, schools, and communities with messages and advocacy on the new language policy approved in December 2022 and the importance of local languages as a means of instruction and the importance of children learning to read in the early grades with textbooks and reading books in the mother tongue language they understand.
- That NERDC promote the enhancement of disability representation of characters in book texts and illustrations in line with the work that has been achieved in balancing gender male and female characterization for comparable knowledge, skills, roles, and accomplishments.

8 FRN, *National Policy on Education*, 11 & 12.

9 Okebukola, *The views of Nigerian teachers in public and private primary schools on the teaching of early literacy in English*, 95.

10 FME & DEPRD, *Early Grade Reading Assessment (EGRA) Using the Nigerian Major Languages (Hausa, Igbo & Yoruba)*, 30.

11 Evans, *Desk review of 2011-2018 Reading Assessments: What we know about Nigerian children’s reading skills*, 37

## Medium term

- That FME Agencies NERDC and UBEC put intentional consideration into expanding the development (NERDC) and procurement (UBEC) of diverse sets of reading book types—literacy textbooks and non-textbook supplementary readers—the same book in audio, e-book, color, black and white formats—in English and widely spoken network languages for building skills and a broader and deeper culture of reading in schools and in homes.
- That GBA works with NERDC and the publishing industry to train authors and publishers on the development of ERMs that meet global best practices for children’s books: title development, and expansion of reading textbook repertoire to produce and market books that children can read for practice, for information, interest, and pleasure.
- That GBA partners promote discussion on copyright and open licensing with MoE and publishers to clarify the roles and benefits of each for supporting the creation of educational books and texts in English and local languages, for promoting authorship, and for enabling access to a wider audience of schools and community readership while protecting intellectual property and avoiding piracy.

## Long term

- That GBA work with NERDC, UBEC and publishers to investigate ways to make quality books available at affordable prices to schools, communities, and households intent on expanding the repertoire of reading books in schools and in the home that go beyond textbooks - to include supplementary readers of narratives stories, information books, reference books, and topic books for building children’s reading skills and enabling their reading practice, reading for pleasure, reading for information, and reading to learn across all subject areas in the curriculum.

## **GBA Recommendations: Market Analysis Focus Group Discussion**

### Short Term

- That GBA and partners support FME reading awareness campaigns on the importance of education, of books, and of learning to read to support children’s learning outcomes in reading and across the curriculum and their contribution to family, community, and national development.
- That FME, UBEC, and NERDC put intentional consideration into increasing advocacy in urban and rural areas on the importance of early-grade instruction and reading books in the local language of the school environment for improving children’s literacy outcomes in a language that they know and understand.
- That MoE, publishers and partners collaborate in knowledge building and sharing on existing and new projects for production of accessible materials for learners with physical, cognitive, or sensory and/or multiple disabilities—reading textbooks in regular and e-form integrating graphics, images, interactive activities, audio (text reading in mother tongue) and video (sign



language in mother tongue) to enrich content and learning experiences for all learners, with or without disabilities.

## Medium Term

- That the GBA work with FME, UBEC, NPC, WB,<sup>12</sup> and partners to open dialogue on household expenditure on education in general, and specifically on household book purchasing capacities and trends in urban and rural areas and in public and private schools. One focus would be to work on future household survey data, such as NEDS, to include more specific indicators for household reporting on book availability in the home—free books, purchased books, types of books (textbooks or non-textbooks), book languages, level of books. The purpose would be to inform policy maker evidence-based decision-making on ERM provision options within the framework of UBE free book policy, state budgets, and household contributions.
- That the GBA and partners support research and development of affordable books that provide options for schools and households to purchase supplementary materials to enrich those provided through the state and government UBE free book supply. The purpose is to enable learners access to a wider repertoire of books for reading practice and reading for information, for pleasure, and for interest, with an adequate range of reading books available in the school and at home.

## Long Term

- That GBA and partners works with FME, NERDC, UBEC to raise awareness on and support access to digital ERM packages in English and local languages developed by government and partner interventions that are available on the Nigeria Learning Passport platform and the Global Digital Library.<sup>13</sup>
- That the GBA supports FME and NERDC to conduct research for exploring the potential for digital learning materials and government digital centers (SMART schools) for enabling alternative access to ERMs by educators, families, and learners, and for supporting quality learning and improvement in reading and learning outcomes.

12 Federal Ministry of Education (FME), Universal Basic Education Commission (UBEC), National Population Commission (NPC) and World Bank (WB)

13 Nigerian Learning Passport (NLP) at: <https://nigerialearningpassport.org/>; Global Digital Library (GDL) at: <https://digitallibrary.io/>

# A. MARKET ANALYSIS BOOK SURVEY (MABS) REPORT

## Availability of Reading Materials in English and Nigerian Languages

### Materials by Language

"It is mandatory for children to learn an indigenous language in the school. While the policy is the language of the environment, if you are here in Abuja, how much of the language of the environment do you know?..."

...While there are over 500 local languages, most of them do not have orthographies. So the use of the three major languages as languages of instruction is a far cry from the national policy, where the guideline is to use the language surrounding the environment of the school. The reality is that there are very few languages that are used in schools outside of the three widely spoken local languages [Hausa, Yoruba, and Igbo] and English."

—Nigerian Educational Research and Development Council Officials, Group Interview

The snapshot market analysis book survey (MABS) reflects the reality of language titles available in schools, as described by the NERDC officials quoted above. Out of 129 books surveyed, the majority of the titles (60%) were in the English language—78 of the books brought in by the MAFGD participants and identified by facilitators in the open marketplace. The respondents classified 50 titles as produced in the widely spoken local languages of Hausa, Igbo, and Yoruba (39%), and one title in Arabic. **(Table A-1)**. Out of the classified language titles, 127 (98.4%) were monolingual and 2 (1.6%) were bilingual dictionaries (English-Arabic and English-Hausa).

The dominance of English over the three Nigerian local languages of Hausa, Igbo and Yoruba in reading materials reflects trends recorded in the literature, focus group discussions, and interviews. It mirrors the national *2020 Early Grade Reading Assessment (EGRA)* findings of school and community preference/expectation "to have children taught in the English language" and to have the local language "taught as a subject," where English as a language of Instruction (LOI) is perceived by parents "as evidence of quality teaching."<sup>14</sup>

14 FME & DEPRD, *Early Grade Reading Assessment (EGRA) Using the Nigerian Major Languages (Hausa, Igbo & Yoruba)*, 30.

Table A-1: Language in which materials were found in the book survey

Language	Estimated Speaker Population in Nigeria <sup>15</sup>	Titles per language	Percentage of all titles surveyed
English	Not applicable	78	60.47%
Hausa	18,500,000 (L1) 15,000,000 (L2)	22	17.05%
Igbo	18,000,000	20	15.5%
Yoruba	18,900,000 (L1) 2,000,000 (L2)	8	6.20%
Arabic	Not applicable	1	0.78%
<b>Total</b>		129	100%

L1 is the speaker's first language, L2 is the second

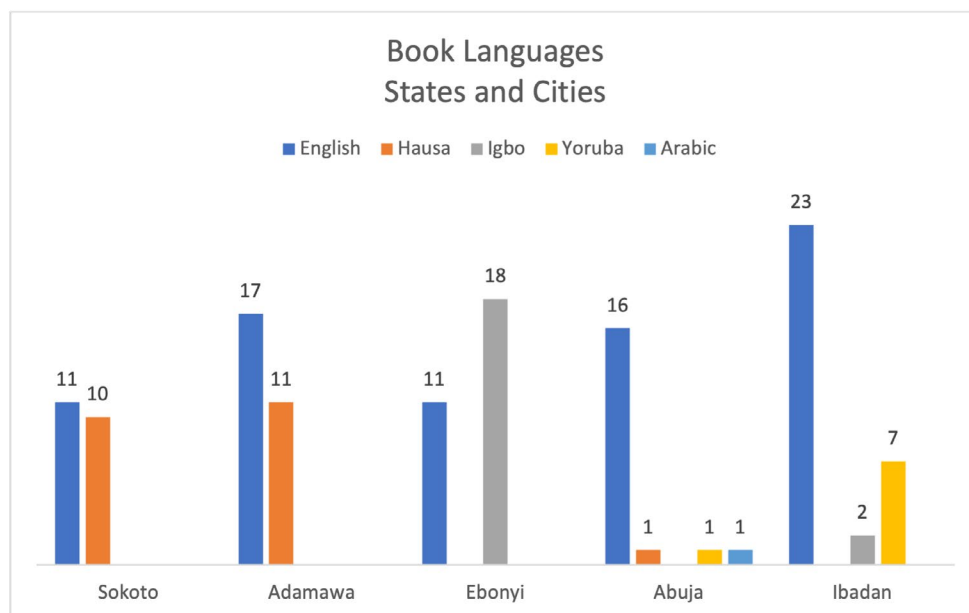
Source: Adama, Sokoto, Ebonyi, Ibadan and Abuja 129 Books Surveyed

**Figure A-1** presents a contrasting picture when titles surveyed were unpacked by individual locales of cities and states. While English language titles still dominated in four out of the five locales, local language titles were more balanced in the states, as outlined below.

- In Sokoto, 11 titles (52%) were in English and 10 titles (48%) in Hausa;
- In Adamawa, 17 titles (60%) were in English and 11 in Hausa (40%);
- In Ebonyi, Igbo was the dominant language with 18 titles (63%), compared to 11 titles (37%) in English;
- In urban locales, English titles dominated—in Abuja (16 titles/84%) and Ibadan (23 titles/72%)—while in Abuja, a few materials were encountered in Hausa, Yoruba, and Arabic (3 titles/16%), and in Ibadan, some materials were identified in Igbo and Yoruba (9 titles/28%).

<sup>15</sup> Evans et al., 2015, cited in USAID, RTI, *Survey of Children's Reading Materials in African Languages in Eleven Countries: Annex G. Summary of the Early Grade Reading Materials Survey in Nigeria*, 186.

Figure A-1: Mapping of Book Title Languages by Cities and States (N=129)



The findings may signify an emerging awareness and demand for local language materials in states. However, they also may indicate challenges with enactment of national policy on education for clarifying the LOI in urban areas when the “language of the immediate environment” is clarified as the language of “monolingual communities.”<sup>16</sup> As alluded to by the NERDC interviewees quoted above, there are issues in clarifying what is the LOI in the multilingual environments of schools in urban areas, such as Abuja and Ibadan.

The National 2020 EGRA reported the complexity of the situation “in states affected by rural-urban migration and the presence of large numbers of labor and economic migrants’ children [who] may naturally speak only the native languages of their parents [while] getting to learn the language of their new environment.”<sup>17</sup> The result is that English becomes “the default language for instruction”<sup>18</sup> in lower primary, particularly in urban areas, and in private schools where parental expectation and preference push for English as the LOI.

A further observation is the lack of survey titles in local languages outside of the three most widely spoken languages of Hausa, Igbo, and Yoruba. While the absence of orthographies impedes the use of the majority of the 500+ Nigerian languages for literacy instruction, there was some anticipation of finding materials in more of the nine network widely spoken local languages for which there are orthographies and materials.<sup>19</sup> For example, there were no titles found in Fulfulde—a network language

16 FRN, *National Policy on Education*, 11.

17 FME & DEPRD, *Early Grade Reading Assessment (EGRA) Using the Nigerian Major Languages (Hausa, Igbo & Yoruba)*, 7.

18 R4D & IEP *Global Book Fund Feasibility Study—Final Report*, 22.

19 The nine network languages in Nigeria used for news broadcast are Igbo, Yoruba, Hausa, Edo, Efik, Kanuri, Fulfulde, Tiv, and Ijaw.

spoken by some 8 million people in Adamawa State<sup>20</sup>—and for which materials have been developed by the Atiki Institute of the American University of Nigeria (as discussed during a GBAIA-SCA interview with an Institute language expert). The issue is that while there have been multiple local language interventions, the materials do not appear to be widely available in the broader education system or the marketplace.

In interviews, some participants referred to materials development in local languages as a niche area of government and donor partners and implementers, where materials produced are not widely available outside of project interventions. Others referred to the need for publishers and authors in private sector publishing to be involved in project intervention capacity building for ERM title development, particularly in the area of local languages. This is to ensure continuity and expansion beyond project cycles. The *Global Book Fund Nigeria Country Study* points to a more fundamental concern on ERM scarcity. The study notes that as the Universal Basic Education Commission (UBEC) does not fund the provision of primary reading books to schools in any language, the availability of reading books in local languages would depend on state and LGEA policy and priorities for reading book provision, where “state and local allocations vary significantly from state to state.”<sup>21</sup>

Yet school community stakeholders in the SCA main report FGDs, explained how schools organize teachers familiar with the language of the immediate school environment to teach early primary classes. The teachers use the local language as a tool to assist young learners understand the English content in their core subject textbooks (English, Mathematics, Science and Technology, Social Studies). The practice is technically termed as code-switching. The teachers appear to do it without training or book support. So they are informally applying the national policy on education medium of instruction in local languages in early primary. For example, teachers in Abuja apply code-switching techniques using Gbagi<sup>22</sup> and Hausa<sup>23</sup> as resources to explain ideas in numeracy and literacy to their P1 and P2 pupils.

## Types of Materials

**“There is demand, but it may not be as high as we might think; because the demand for reading materials depends on the curriculum, but very few schools will buy more than what is stipulated in the curriculum. In government schools, the demand is very low; in the private schools, the demand is higher for reading hour and for reading outside the school.”**

—Participant, MoE and Publishers MAFGD, Abuja FCT

**Table A-2** maps the type of textbook-related and non-textbook-related materials found in each language domain of book survey titles.

20 RTI, USAID, *Survey of Children’s Reading Materials in African Languages in Eleven Countries: Annex G. Summary of the Early Grade Reading Materials Survey in Nigeria*, 183.

21 R4D & IEP, *Global Book Fund Feasibility Study - Final Report and Annex 3, Global Book Fund Country Study, Nigeria*, 221

22 Gbagi is the local language of the immediate environment of schools in Abuja-FCT.

23 Hausa is the most widely spoken local language of the immediate environment of schools in northern Nigeria.

- Out of the 129 titles surveyed, 98 (76%) were pupil textbooks covering pupil primers or reading textbooks (inclusive of decodable and levelled readers) and related materials of workbooks and teacher guides. The remaining 31 titles (24%) were non-textbook supplementary materials covering narrative, information, reference, and other supplementary categories such as poetry, songs, riddles, and proverbs.
- What is notable is the similarity with the RTI 2016 Summary of EGR Materials in Nigeria Survey finding of an 80%/20% division between textbooks and non-textbooks. The survey observed that “Nigeria had the lowest number of non-textbooks across countries in the study.”<sup>24</sup>
- The quotation from the Abuja MAFGD participant above offers an explanation on the low numbers of non-textbooks found in both surveys. The demand is for materials stipulated by the curriculum and by national and school procurements for the curriculum, which focus on core subject textbooks (mathematics, science and technology, language, and social studies). Textbooks have a higher priority value compared to non-textbook supplementary readers.
- Yet in interviews with NERDC, UBEC and Library Services Agencies, officials reported the procurement of supplementary readers for state, school and classroom libraries. However, a National Library of Nigeria official recounted in interview discussion: that teachers are not reading broadly, they use only the recommended textbooks to prepare notes; that parents buy only textbooks on the recommended book list; and that there is a lack of encouragement and motivation for children to read the books (in schools, libraries and in the home).
- The importance of having an adequate supply of non-textbook supplementary reading materials for building literacy skills and a broader culture of reading practice would seem to require a wider awareness campaign and dissemination in schools, institutions, and communities, as per the gaps in this area identified in the 2016 and the current 2022 book surveys.

**Table A-2: Number of Different Types of Materials Identified, by Language**

Language(s)	Textbook Related				Percentage of Total Titles
	Pupil Literacy Textbook	Pupil Textbook and Workbook	Literacy Teacher’s Guide	Subtotal	
English	41	12	5	58	45%
Hausa	12	3	2	17	13.18%
Igbo	14	3		17	13.18%
Yoruba	4	2	-	6	4.7%
Arabic	-	-	-	-	-
TOTAL	71	20	7	98	76%

24 Ibid, 187.

Language(s)	Supplementary Non-Textbook Related					Subtotal	Percentage of Total Titles	Total	Percentage of Total Titles
	Narrative	Informational	Reference	Poetry, Plays, etc.					
English	15	4	1		20	15.05%	78	60.47%	
Hausa	3	1	1	-	5	3.88%	22	17.05%	
Igbo	2	-	-	1	3	2.31%	20	15.5%	
Yoruba	2	-	-		2	1.55%	8	6.2%	
Arabic	-	-	1	-	1	0.78%	1	0.78%	
TOTAL	22	5	3	1	31	24%	129	100%	

- **Table A-2** presents evidence of key material types to promote early-grade literacy that were identified in the survey titles.
- The presence of 7 teacher guides in the textbook-related materials is noteworthy. They were described as teacher guides for literacy programs in English, in the three widely spoken local languages of Hausa, Igbo and Yoruba, and for transition to English from local languages. They were attributed to various English, local language, and technology-enhanced literacy programs (NEI Plus, Jolly Phonics, SENSE, TELA, RANA)<sup>25</sup>
- The ratio of pupil textbook to teacher guide titles was 10:1 in the survey. It suggests investment in teacher supports of training and “step-by-step lesson guides as part of multifaceted instructional programs [to] improve pedagogy” and to optimize the investment in pupil textbooks for improving learning outcomes.<sup>26</sup>
- The non-textbook supplementary readers in the survey were identified as collections of texts, poetry, riddles, songs, and so on that would suggest materials for enhancing the teaching of reading as a subject. On the other hand, the identification of reference dictionary titles (English, English-Hausa, English-Arabic) and a play title would suggest materials for enhancing the teaching of language as a subject.

The National EGRA 2020 highlights major gaps in “teaching the concept of ‘reading’ as a subject as well as the capacity of teachers to teach reading.”<sup>27</sup> The package of teacher guides and pupil literacy textbooks and workbooks encountered in the survey provides evidence of materials developed and

25 Northern Education Initiative Plus (NEI Plus), Jolly Phonics, Strengthening Education in the Northeast Nigeria States (SENSE), Technology Enhanced Learning for All (TELA), Reading and Numeracy Activity (RANA).

26 FCDO and WB, *Cost-effective approaches to improve global learning: What does recent evidence tell us are “Smart Buys” for improving learning in low- and middle-income countries?*, 12.

27 FME & DEPRD, *Early Grade Reading Assessment (EGRA) Using the Nigerian Major Languages (Hausa, Igbo & Yoruba)*, 30 - 31.

tested to build knowledge and skills around multi-lingual early literacy programs. The need appears to be for a broader repertoire of non-textbook supplementary materials that are focused on enhancing early-grade reading for practice, for pleasure, and for learning across the curriculum.

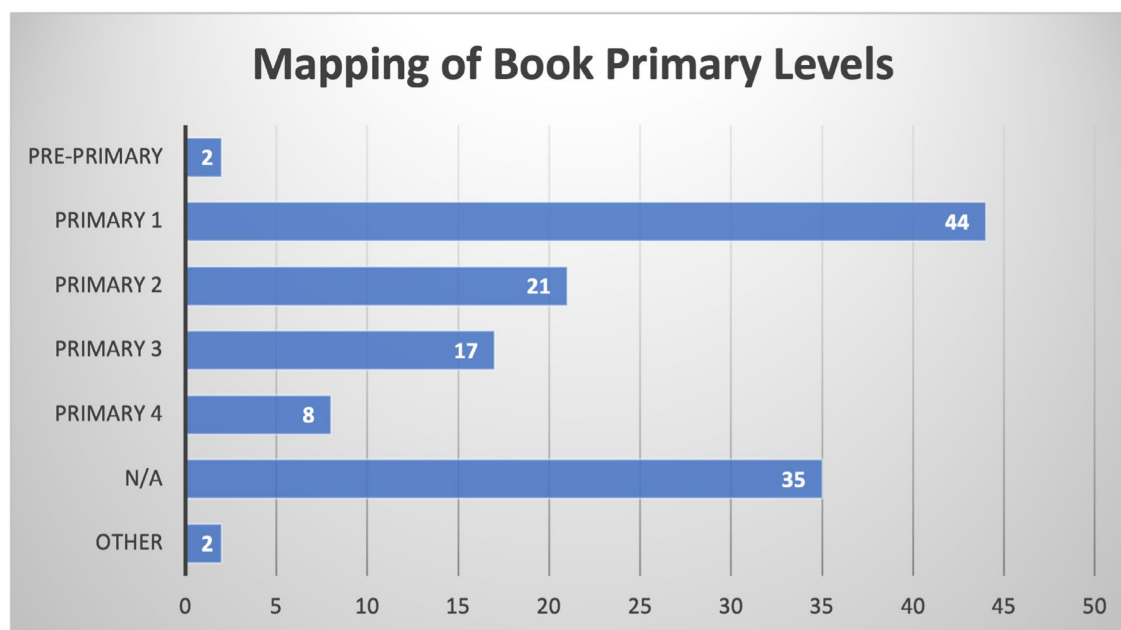
## Availability of Materials for Early Primary Level

### Level

Out of the 129 titles, the majority (92 titles/71%) were found to have publisher labels indicating the level for each title, from pre-primary to Primary 4 (**Figure A-2**). The largest concentration was for Primary 1 level, with 44 titles (34%). There were 35 titles (27%) identified as “not applicable,” and these were more likely non-textbook supplementary materials of narrative, information, reference, and topic reading books that had no level labels. There were two titles designated as “other” and identified as a reading book of fable stories and a secondary-level language book.

A small proportion of the non-textbooks were found to have publisher-labeled levels. These were likely supplementary practice readers corresponding to pupil leveled reader textbooks. It was not possible to evaluate levels of difficulty for the remaining non-textbooks. As a new addition to textbook materials, non-textbook supplementary reading materials may have presented challenges for labeling in the survey—as they do for teachers who need to evaluate their appropriateness for the level of their learners.

**Figure A-2: Levels of Reader Materials**





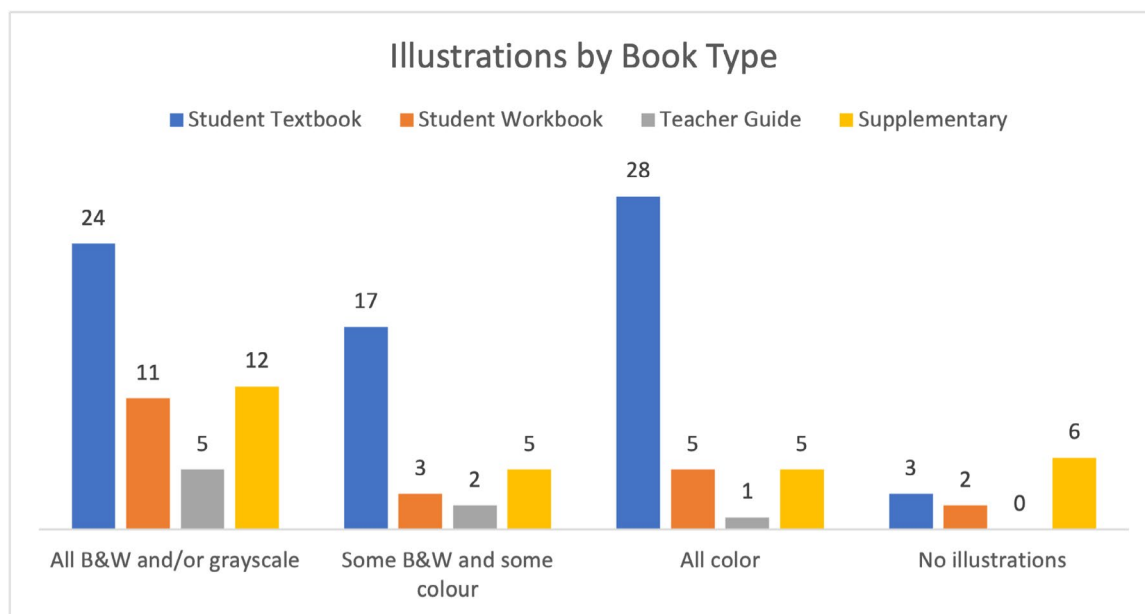
## Illustrations

“The processes of producing both [black-and-white and color books] are not the same. [The] printing of colored materials would cost more money. It would undergo many processes and would consume more materials than the black-and-white. Black-and-white books are easier and cheaper in material consumption. While the color books consume more colors during production, it appears more beautiful and attractive to the pupils.”

—Participant, MoE and Publishers MAFGD, Adamawa State

Out of the 129 books surveyed, 118 (91%) had illustrations—whether in black-and-white (B&W) and/or grayscale, in B&W with some color, or in all four colors used in book publishing. As shown in **Figure A-3**, categories of pupil textbooks, workbooks, teacher guides, and supplementary readers primarily included illustrations produced in all B&W and/or grayscale (52 titles/40%). This is not surprising, in view of the Adamawa participant quoted above on the issues of cost for including color in book production.

**Figure A-3: Illustration Presence and Presentation in Book Types**



The exception was the pupil textbooks, where the largest portion of these titles contained illustrations in all colors (28 titles/22%), followed by all B&W and/or grayscale in 24 titles (19%), and some B&W and some color in 17 titles (13%). Perhaps this is linked to the Adamawa participant observation on the value of color in rendering “a more beautiful and attractive” book product for the pupil—an important incentive to engage learners with literacy textbooks. It is an observation echoed in a study on what works in early reading materials, which suggests that “providing readers with colorful and engaging materials can have a positive effect on their motivation to read” while emphasizing that “there is no definitive evidence that color illustrations are better for early reading development than illustrations in

black and white.”<sup>28</sup> NERDC officials in the research review meeting noted how ‘some learners react to colors, so we encourage publishers to produce books in various formats to encourage inclusivity.’

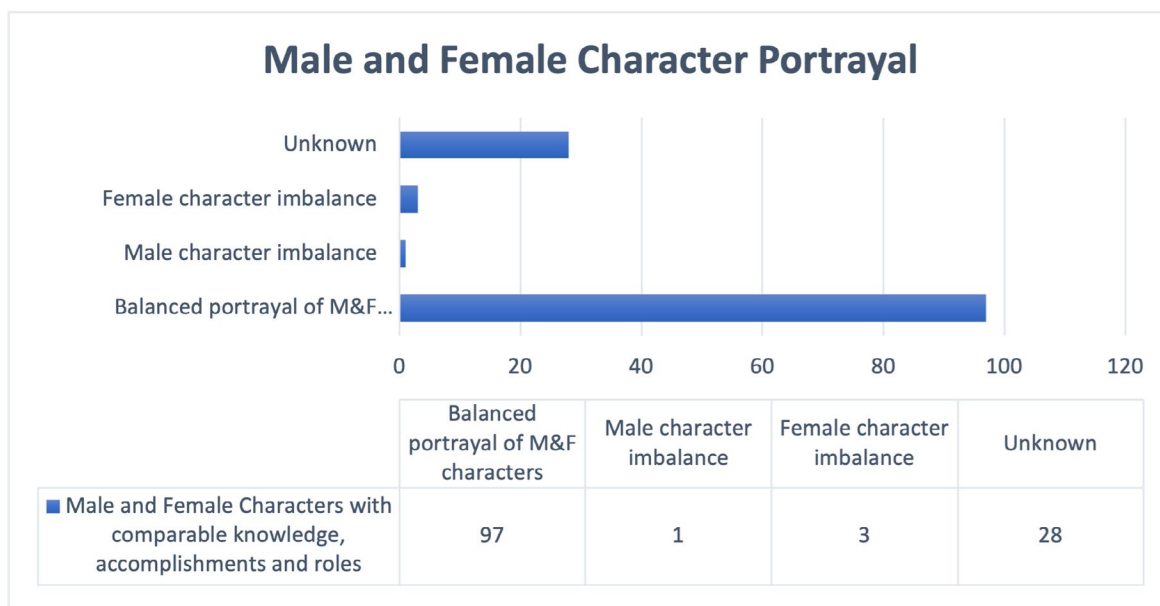
The remaining pupil workbook, teacher guide, and supplementary reader group titles predominantly featured B&W and/or grayscale in illustrations (28 titles/22%), while B&W and some color illustrations were featured in 10 group titles (8%), and all-color illustrations were found in 11 group titles (8%). The books containing no illustrations were few, comprising 3 pupil textbook titles (2%), 2 pupil workbook titles (2%), and 6 supplementary reader titles (5%).

### Frequency and Quality of Gender Representation

The MAFGD participant/facilitator respondents evaluated the survey’s 129 titles for their portrayal of male and female characters in the book illustrations. The evaluation criteria centered on portrayals of comparable knowledge, accomplishments, and roles. Whereas the respondents judged illustrations in 97 of the titles (75%) to portray both genders in balanced roles, they evaluated portrayals in 28 titles (22%) as being “unknown.” (Figure A-4).

Perhaps the need was for evaluation of content texts and stories in the materials as well as in the illustrations. This would enable more robust comparison of male and female characters (girls and boys/men and women) across all title content in terms of their knowledge sets, their exercising of both traditional and nontraditional roles, their collaboration and cooperation, and their equality of opportunity to participate in activities and accomplishments.

Figure A-4: Portrayal of Male and Female Characters in Text Illustrations



28 Robledo & Gove, *What Works in Early Reading Materials (Knowledge and Practice in International Development)*, 17

## Disability

“Unfortunately, no EGR materials are developed for children with special needs. Children with special needs are mostly only included as characters in books.”

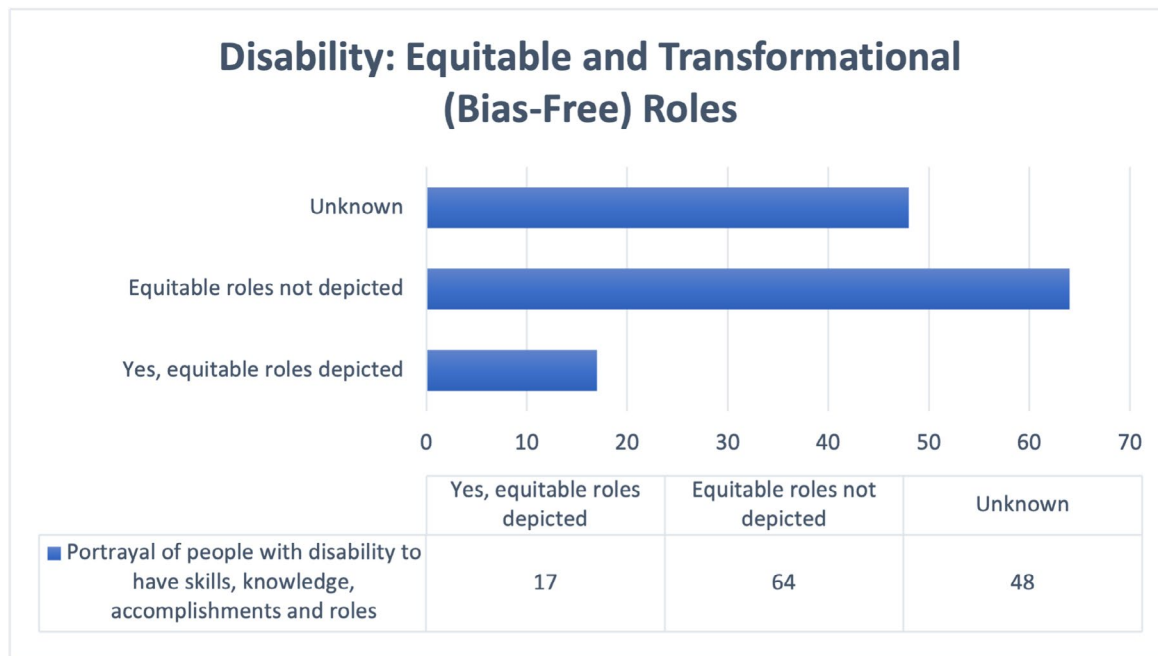
—Interviewee, Publishers and Authors Interview, Sokoto State

“The books (content) that you are designing from the curriculum are both for children with and without special needs and so the books should only differ in terms of the presentation [braille, audio, print book formats].”

—Participant, MoE and Publishers MAFGD, Sokoto State

Out of 129 titles, the respondents judged 17 (13%) to have illustrations that depict people with disability in roles that are bias-free, portraying them not as passive or subservient but as active people participating in their communities with knowledge, accomplishments, and roles.

Figure A-4: Disability Portrayal in Equitable and Transformation Roles



Illustrations in 64 titles (50%) were deemed by respondents to lack any portrayal of characters with disabilities, and 48 titles (37%) had responses of “unknown.” The revelation in the survey is that, while there is an inclusive policy environment and a practice for inclusion of characters with disabilities in book publication, as in the first quotation above, the reality is underrepresentation of characters with disabilities in the surveyed books. The 17% of books carrying illustrations of characters with disability were likely associated with government-partner EGR intervention book designs, as mentioned in the second quotation above. A USAID Guide for Strengthening Gender Equality and Inclusiveness in

Teaching and Learning Materials suggests that approximately 15% (1 in 7) of illustrations or images in a book should be of characters with disabilities, reflecting the 10–15% of “children aged 18 years and younger [who] are born with a disability or become disabled.”<sup>29</sup>

Like the previous responses on gender portrayal, there is a need for reviewing title content as well as illustrations for a deeper verification of the presence of transformational and equitable character roles portraying persons with disability. The requirement is to eliminate generalization, assumptions, stereotypes, and labeling by focusing on the person—their skills, knowledge, and accomplishments—rather than on the disability.

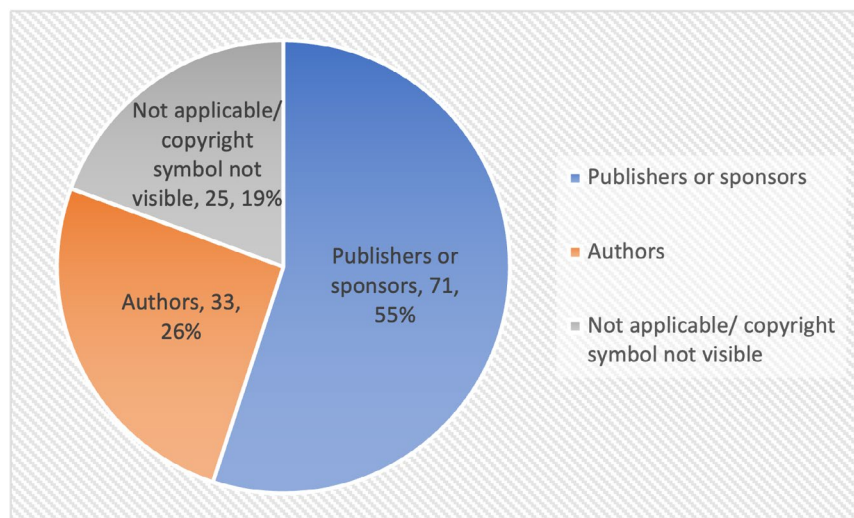
A final observation is the high number of “Unknowns,” which may reflect that the respondents do not have a clear opinion or appreciation of the importance of inclusive illustrations.

## Feasibility of Reusing, Adapting, and Reproducing the Materials

### Copyright

Out of the 129 titles reviewed by respondents, they found 71 titles (55%) indicating copyright owners as publishers or sponsors and 33 titles (26%) indicating copyright owners as authors. In 25 titles (19%) the copyright either was not applicable or the symbol was not discernible (**Figure A-5**).

**Figure A-5: Copyright Ownership**



29 RTI, *A Guide for Strengthening Gender Equality and Inclusiveness in Teaching and Learning Materials*, 2

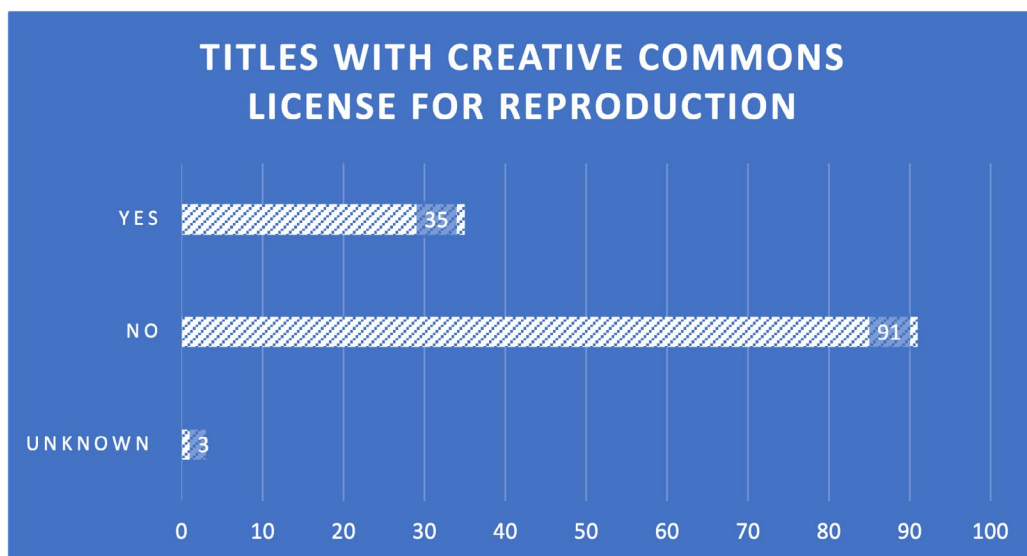
## Creative Commons

“All materials produced under Creative Commons have free access. We don’t charge – if private institutions are printing, they can charge down the line as they are going to use their money to print. We don’t collect anything from whoever is interested in reproducing the materials.”

—Donor/ Development Partner, Interview

As shown in **Figure A-6**, the availability of materials under Creative Commons (CC) licensing was identified by respondents in 35 titles (27%). Out of these, 13 titles (10%) were from donor interventions. As discussed by the interviewee in the quotation above, they can be used for sharing materials in print reproduction under a Creative Commons license that requires no payment other than accreditation of the work to the source. The titles came from the USAID Northern Education Initiative Plus (NEI Plus) and Strengthening Education in the Northeast Nigeria States (SENSE) projects, the UNICEF/DFID Reading and Numeracy Activity (RANA) Project, and the American University of Nigeria/USAID Technology Enhanced Learning for All (TELA) Project. These and other open-access materials can be retrieved for adaptation, reuse, and reproduction from the newly launched Nigerian Learning Passport platform—an initiative of the Federal Ministry of Education in partnership with UNICEF.<sup>30</sup>

**Figure A-6: Number of Titles with Creative Commons License**



Respondents identified the remaining 22 CC titles (17%) as licensed by publishers. The finding may represent a confusion with the CC question, as most of the identified titles were priced in the survey. They did not appear to have a sharing or free access dimension as described in the quotation above. Furthermore, in GBAIA interviews publisher stakeholders discussed reservations on the viability of the Creative Commons license in protecting intellectual property in a Nigerian book marketplace that is saturated with problems of piracy, plagiarism, and copyright violations. In the literature, there is

<sup>30</sup> FME, *Nigeria Learning Passport*.

reticence around the compatibility of open access with the role of copyright to incentivize authors, publishers, and government for continuous production and creative contribution to the book market.<sup>31</sup> This is particularly important for the production of an essential reading materials market where there are critical gaps outside of project interventions, as discussed in the previous sections on the underrepresentation of local language materials in the survey. Overall, open access materials do not appear to have gained traction with the majority of publishers, where 91 titles (71%) were not available under CC.

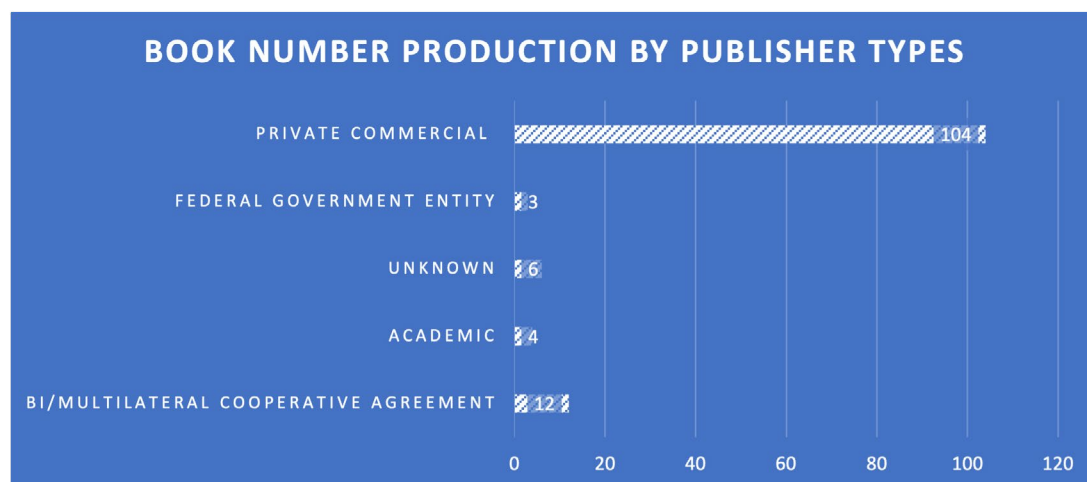
## Publishing Landscape in Reading Materials Production

### Publisher Type

**Figure A-7** presents a mapping of the survey titles produced by different organization types. The largest proportion of books was published by private commercial publishers—a total of 104 titles (81%). The range of private commercial publishers included older generations (Macmillan, Learn Africa, ULPC, Evans, West African Book Publishers) and newer generations (Rasmed, Extension, Binani, Havilah, Metropolitan) of publishing houses. In all, 51 commercial publishers were identified in the mapping, which is not surprising given the rapid growth of the private publishing sector in response to the enormous potential of the expanding Nigerian educational market.

There were 3 titles (2%) published by the Federal Ministry of Education agency of the Universal Basic Education Commission (UBEC). The titles published under academic entities included a University of Ibadan publication (1 title: 0.78%) and TELA/American University of Nigeria publication of 3 titles (2%). There were 12 titles (9%) identified as published under bilateral/multilateral cooperative agreements between the government of Nigeria and USAID, UNICEF/DFID, and WB.<sup>32</sup> There were 6 titles (5%) where publishers were not or could not be identified.

**Figure A-7: Number of Reading Materials Produced by Different Publisher Types**



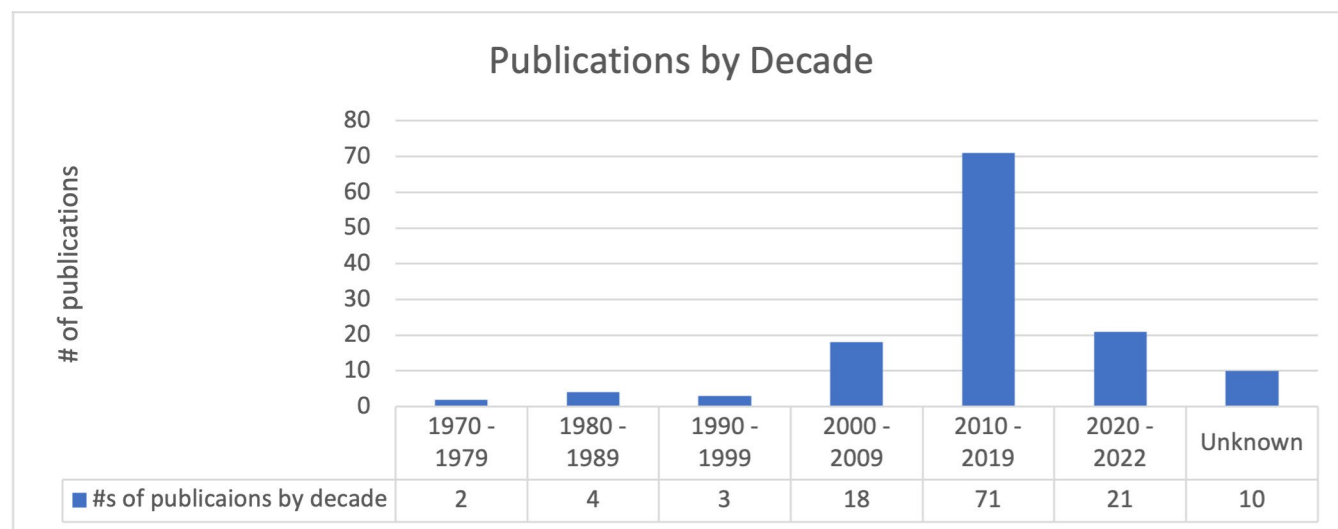
31 Nkiko, *Book Piracy in Nigeria: Issues and Strategies*, 395.

32 US Agency for International Development (USAID), United Nations Children’s Fund (UNICEF)/Department for International Development (DFID), and World Bank (WB)

## Year of Publication

As shown in **Figure A-8**, most of the survey's 129 titles were published in the first decades of the 21st century, with the majority having been published since 2010 (92 titles: 71%). However, it is noteworthy that some of the titles go back as far as 1970, with publications identified for the last quarter of the 20th century. This period marked the earliest initiatives by government institutions in the use of a range of Nigerian languages as the languages of instruction, including Hausa, Yoruba, English, and some 30 other widely spoken local languages.<sup>33</sup> Out of the 9 titles (7%) published during this period, 5 titles (4%) were produced in local languages of Hausa and Igbo.

**Figure A-8: Number of Titles Published Over Six Decades of Interventions**



## International Standard Book Number (ISBN)

The respondents identified International Standard Book Numbers in 93 (72%) of the 129 survey titles. This number might be considered low for Nigeria, given that there are legal requirements for authors and publishers to register their works with ISBN in the National Library Bibliography. Furthermore, Federal and State Ministries of Education require that publishers' and authors' books have ISBNs for inclusion in the much-coveted book selection lists to be considered in national procurements. The missing ISBNs in 28% of survey titles could be attributed to non-registration of the books by publishers/authors or to respondents' difficulties in locating the numbers on title cover pages.

## Price

The MAFGD respondents reviewed the prices of the 129 survey titles. They identified 18 titles (14%) as free, 27 titles (21%) as prices unknown and 84 titles (65%) with prices (see **Table A-3**).

What is notable is the consistency of pricing across textbook and non-textbook categories. Price averages for textbooks were just under **US\$2.20** (N912/US\$2.19) and for non-textbooks just under

33 Trudell, *Language and Education in Nigeria—A review of policy and practice*, 31.

**US\$2.00** (N747/US\$1.79). Prices ranged from just under **US\$0.50** (N200/US\$0.48) for low-cost titles to just under **US\$5** (N1,950/US\$4.68) for high-cost titles. The exception was the non-textbook narrative category which included a high-end title price of **\$9.48** (N3,950).

**Table A-3: Prices of Materials—Textbook and Non-Textbook**

Book type	Number Recorded as Free	Number Recorded as Price Unknown	Number Recorded with Price	Total	Average Price in Naira/ USD for Non-free Materials	Price Range in Naira/ USD for Non-free Materials
Textbooks						
Pupil Textbooks N = 71	6	18	47	71	N912.02 \$2.19	N200 – N2,000 \$0.48 – \$4.80
Pupil Workbooks N = 20	5	3	12	20	N958.33 \$2.30	N200 – N1,950 \$0.48 – \$4.68
Teacher’s Guides N = 7	7	-	-	7	0.00	0.00
Non-textbooks						
Narrative N = 22	-	5	17	22	N746.47 \$1.79	N180 – N3,950 \$0.43 – \$9.48
Informational, reference, poetry N = 0	-	1	8	9	N812.5 \$1.95	N200 – N1,800 \$0.48 – \$4.32
Total	18	27	84	129		

Rate: ₦1 = USD\$0.0024 (08-21-22)

## Free Books

The free reading materials identified in the survey (18 titles: 14%) were produced through government partner interventions as discussed in previous sections. Some titles referenced the UBEC and World



Bank *Better Education Service Delivery for All (BESDA)* partnership program. The partnership sought to facilitate and fast track procurement and scaling of tested literacy materials to make them available under the Universal Basic Education free book provision in primary schools and centers for out-of-school children across states. These included both literacy titles identified in the survey and others, as in titles in English (*Jolly Phonics*) and in widely spoken local languages of Hausa (*Mu Karanta/Let's Read*), Igbo (*Ka anyi gụọ/Let's Read*), and Yoruba (*Iwe-Kika/Reading Book*).<sup>34</sup>

## Low-cost Books

“The demand for books has always been there. In the past, books such as the ‘Ka Koyi Karatu’ [‘Learn to Read’] and ‘Kara Karatu’ [‘Read More’] series were used. The books are still available and cheap and contain important content to teach reading and comprehension. The books also include important life lessons, such as trust and other values. They sell for N150–N250 [USD \$0.36–\$0.60] and parents do get them for their children.”

—Participant, School and Community MAFGD, Sokoto State

The Sokoto FGD participant quotation speaks of a demand for cheap reading materials by school communities of teachers and parents. It is a demand that is seeking to find a place in the debate for school and household access to affordable textbook and non-textbook reading materials that can enhance learner opportunities in school and at home for learning to read, for reading practice, reading for pleasure, reading for information, and reading to learn across the curriculum.

**Table A-4** presents some of the low-cost textbook and non-textbook titles found by book survey respondents in the open marketplace (and, in one case, provided by the publisher). The average cost of a low-cost reading textbook or non-textbook supplementary reader in English and local languages from the marketplace works out at under US\$1 (N313/US\$0.75)

**Table A-4: Low-Cost Reading Materials in the Marketplace**

State	Book Type	Language	Where Book was Found	Cost
Ebonyi	Primer/Reading Textbook	Igbo	In the market (i.e., at a bookstore, shop, open-air stand, or other distribution)	N200 \$0.48
Ibadan	Non-textbook Supplementary/Narrative	English	At a bus stop/terminal for motor parks	N180 \$0.43
	Non-textbook Supplementary/Narrative	Yoruba	Provided by publisher	N250 \$0.60
Sokoto	Primer/Reading Textbook	Hausa	In the market (i.e., at a bookstore, shop, open-air stand, or other distribution)	N250 \$0.60

34 Business News, Feyisipo, *BESDA: Oyo UBEC adopts Iwe-Kika for out-of-school children*, 2021.

State	Book Type	Language	Where Book was Found	Cost
Abuja	Primer/Reading Textbook	English	In the market (i.e., at a bookstore, shop, open-air stand, or other distribution)	N500 \$1.20
Adamawa	Primer/Reading Textbook	Hausa	In the market (i.e., at a bookstore, shop, open-air stand, or other distribution)	N500 \$1.20
			<b>Average</b>	<b>N313.34</b> <b>\$0.75</b>

Rate: ₦1 = USD\$0.0024 (08-21-22)

The issue of low-cost reading materials is similar to the issue of low-fee private schooling, identified by Baum et al. (2018) as running a risk of “heterogenous quality.”<sup>35</sup> For example, a RARA 2014 review of the *Ka Koyi Karatu* series, mentioned by the MAFGD Sokoto participant quoted above, found quality concerns with the book cover and inside paper, which were “thin, not durable.” However, the review clarified that some stories in the series met “read-aloud potential” quality criteria for new materials development.<sup>36</sup>

Notwithstanding the issues of heterogenous quality, the concept of the cheap book—as raised by stakeholders in interviews, FGDs, and webinars<sup>37</sup>—is that books optimized for affordability using cheaper raw materials can enable affordable access to diverse and expansive reading materials, even for the poorest pupil households.

## GBA Findings: MABS Strengths

- The survey captured a wide selection of reading titles in English and the three widely spoken local languages of Hausa, Igbo, and Yoruba that are used for language of instruction, language teaching, and literacy teaching in schools.
- The survey showed evidence of textbook reading materials, including pupil reading textbooks and related materials of pupil workbook and teacher guides, and non-textbook supplementary materials of narrative collections, information, reference, and topic books.

35 Baum, et al., *Inequality of educational opportunity: The relationship between access, affordability and quality of private schools in Lagos, Nigeria*, 459.

36 RTI and USAID. *Nigeria Reading and Access Research Activity (RARA): Review of Existing Reading Materials to Support Hausa Literacy Instruction*, 19.

37 GBA, Chakava, Walter, Kolawole, Wafawarowa, *Private Sector Book Publishing in Africa, Webinar from Global Book Alliance and African Publishers Alliance*.

- The majority of the titles had illustrations—an important incentive for engaging learners with literacy and reading books.
- The book illustrations were gender-balanced in portrayal of male and female characters with comparable roles, knowledge, and accomplishments.
- The majority of books carried copyright symbols indicating author and publisher ownership; books produced under government-donor initiatives had Creative Commons license symbols giving permission for reuse, adaptation, and reproduction.
- Books were produced and published primarily by private commercial publishers, followed by a smaller production and publication under government-partner initiatives.
- The cost of books surveyed showed elements of price consistency and affordability, with **average prices ranging between US\$1 and US\$2**. A textbook reader or primary average cost was under **US\$2.20** (N912/US\$2.17), a supplementary reader under **US\$2.00** (N747/US\$1.78), a low-cost book under **US\$1** (N313/US\$0.75) and **free books** provided under Government Universal Basic Education (UBE) and partner-funded schemes.

## GBA Findings: MABS Weaknesses

- The dominance of English-language titles, particularly in urban locales in cities and states, signaled the use of English as a default language of instruction (LOI) in most schools—an apparent deviation from national policy on education for use of language of the immediate school environment as LOI.
- The dominance of textbook primer and reader titles (76%) over non-textbook supplementary narrative, informational, and reference reader titles (24%) was indicative of a higher priority and demand for core textbooks in schools and national procurement and of less awareness of the value of supplementary readers for building literacy skills and reading culture in schools and homes.
- The book illustrations in the survey titles lacked portrayals of persons with disability and failed to portray them in equitable and transformational roles.
- Illustrations in the book survey titles were mostly black-and-white/grayscale, owing to the high costs for inclusion of some color or all colors in book production and printing.
- The Creative Commons licensing of materials has not gained traction among private commercial publishers who are the largest players in the book industry, as their higher priority is copyright for protection of intellectual property and to incentivize continued production and creativity in book development.
- The average cost of books is not affordable for schools and households in public and private schools; there is a demand for low-cost “cheap” books to enable children to have access to textbooks and non-textbook supplementary readers to practice and build literacy skills in school and at home.

# GBA Recommendations: Market Analysis Book Survey

## Short term

- That the GBA and partners support FME and NERDC reading awareness campaigns in states, LGEAs, schools, and communities with messages and advocacy on the new language policy approved in December 2022 and the importance of local languages as a means of instruction and the importance of children learning to read in the early grades with textbooks and reading books in the mother tongue language they understand.
- That NERDC promotes the enhancement of representation of characters in book texts and illustrations in line with the work that has been achieved in balancing gender male and female characterization for comparable knowledge, skills, roles, and accomplishments.

## Medium term

- That FME Agencies NERDC and UBEC put intentional consideration into expanding the development (NERDC) and procurement (UBEC) of diverse sets of reading book types—literacy textbooks and non-textbook supplementary readers— the same book in audio, e-book, color, black and white formats - in English and widely spoken network languages for building skills and a broader and deeper culture of reading in schools and in homes.
- That GBA works with NERDC and the publishing industry to train authors and publishers on the development of EGR materials that meet global best practices for children’s books: title development, and expansion of reading textbook repertoire to produce and market books that children can read for practice, for information, interest, and pleasure.
- That GBA partners promote discussion on copyright and open licensing with MoE and publishers to clarify the roles and benefits of each for supporting the creation of educational books and texts in English and local languages, for promoting authorship, and for enabling access to a wider audience of schools and community readership while protecting intellectual property and avoiding piracy.

## Long term

- That GBA work with NERDC, UBEC and publishers to investigate ways to make quality books available at affordable prices to schools, communities, and households intent on expanding the repertoire of reading books in schools and in the home that go beyond textbooks to include supplementary readers of narratives stories, information books, reference books, and topic books for building children’s reading skills and enabling their reading practice, reading for pleasure, reading for information, and reading to learn across all subject areas in the curriculum.

## B. MARKET ANALYSIS FOCUS GROUP DISCUSSION (MAFGD) REPORT

### MAFGD: Publishers and MoE

#### Reading Books—Demand, Supply, and Threshold Selling Prices

**“There is high demand for reading materials in Adamawa State. The demand is paramount and for materials at early grade it is high. The high demand cannot be overemphasized.”**

*—Participant, MoE and Publisher MAFGD, Adamawa State*

On the demand for reading books, participants in MoE and publisher MAFGDs across all locales of states and cities reported a high demand for essential reading materials (ERMs) in general. Participants linked the demand to requirements in the Nigerian Educational Research and Development Council (NERDC) curriculum for English and local languages. While some discussed the demand as integral to reading as the foundation of learning, others raised observations on the need to designate reading as a subject separate from language in the curriculum. Participants pointed out a major discourse that is emerging as to how to stimulate reading from pre-primary into primary in a curriculum that some perceived as overloaded with activities.

In Abuja FCT, participants raised the issue of a lack of libraries in schools and consequent lack of general interest in reading materials by learners. They mentioned inadequate levels of the books required to motivate learners to read and show preference (and demand) for different types of books, e.g., “real-life adventures, family stories, and books in color.” In Sokoto, participants noted how in the past the Universal Basic Education Commission (UBEC) supplied supplementary readers to libraries in states and schools, where “the books are mostly kept in the libraries without being used.”



Completing the Market Analysis Book Survey, MABS, Adamawa

The MoE and publisher market analysis focus group discussions (MAFGDs) revealed dichotomies in book demand for reading textbooks and non-textbook supplementary reading materials that were mirrored in the market analysis book survey (MABS) findings. In the MABS, textbook titles (primers

and reading textbooks, inclusive of decodable and levelled readers) represented 76% of the books encountered. They dominated non-textbook titles (supplementary readers of narrative, information, reference, and topics), which, at 24% of books encountered, confirmed a greater demand for textbook over non-textbook supplementary readers.

The MAFGD unpacked more issues in book demand in the states (Adamawa, Sokoto, and Ebonyi), with observations on expressed need and desire for reading materials, while the actual demand was low. In Abuja, participants reported more demand in private schools where the cost of books is included in school fees and where reading is encouraged with time-tabled reading hours and reading outside schools. Recurrent themes of low demand were raised by participants throughout the MAFGD discourse in states and city locales related to (1) government schools not imposing book purchasing on parents, and (2) many families lacking purchasing power for ERMs.

**“Demand for reading materials in local languages is very low, both in private and public schools. This is because society has lost value for our culture and language. Schools now refer to our local language as ‘vernacular’.”**

*—Participant, MoE and Publishers MAFGD, Abuja FCT*

The demand for local language ERMs showed further divisions in discussion on school community perceptions of their value. On one hand, Ibadan MAFGD participants spoke of the ease of learning in a local language that children understand; Ebonyi participants discussed demand for local language books for teaching literacy and mathematics to youth in mass literacy education programs; and Sokoto participants asserted the relevance of local language content for effective teaching and learning. In contrast, the Abuja FCT participants described how the lack of demand for local reading materials “is a worry,” with no materials observed in private schools that they noted were gradually “taking over the pre-primary and primary school majority” in the territory,<sup>38</sup> and few books observed in government schools, “where you find materials that they have is shared between 20 children, i.e., each book for 20 children.” The issue is complex, as seen in the quotation above, with an observed decline of mother tongue in schools in relation to its cultural value as well as its pedagogical merit for instruction and literacy in a language children understand. In Abuja FCT, participants indicated a need to increase advocacy for indigenous languages in national institutions and school communities, citing the creation of the Yoruba Language Center in the southwest region as a model that other regions should emulate for language advocacy.

The MABS snapshot mirrors the MAFGD school community discussion where English-language titles (60%) dominated local language titles of Hausa, Igbo, and Yoruba (39%). The predominance of English titles was heavier in urban locales of Abuja FCT (84%) and Ibadan (72%), while being more evenly balanced with local language titles in the states.

38 In the research introduction Table 0-1: Primary Education Statistics – Enrolments, Dropouts, Schools and Classrooms, Abuja has the highest percentage of private schools in the SCA research states at 31%, i.e., almost 1 in 3 schools are private.

## Books for Learners with Special Needs

**“There is a great demand for books for children with special needs, but the materials are not available in the market. Even when parents want to buy the books, they are not in the market.”**

—Participant, School and Community MAFGD, Sokoto

On special-needs education, the general consensus was that reading books for special needs were not to be found in the market. In Abuja FCT, MAFGD school community participants underlined the need for special reading books and associated materials for slow readers or children who were not reading at the right level. In Sokoto, the head of a state special school discussed the expense of importing specialist books from abroad to support building of sign language and manual alphabet skills in early literacy programs for children with hearing impairment. Adamawa participants discussed the need to import special education books from other states. Ebonyi participants related the challenges of publishing facilities required to produce audio and braille materials for the hearing and visually impaired. In Ibadan, school community participants reported on state priority projects to provide equipment for special-needs schools, inclusive of books and tools for braille, audio, and sign languages, in math and literacy for learners with visual and hearing impairments.<sup>39</sup> The Ibadan publisher participants spoke of changes in the publishing environment with the establishment of a digital studio for audio book production.



Principal, AA Rajo Special School, discussing ERMs for special education in Sokoto MAFGD for Schools and Community

Participant accounts in all MAFGDs related how difficult it was to encounter books for special-needs learners in the marketplace. Publishers reported the cost of producing formatted books in braille and audio running at ten times the production cost of regular books. The recently released Partnership for Learning for All in Nigeria (PLANE) book supply chain study elaborates on the challenges in producing braille materials where “books are three to four times more voluminous than print books and require more braille paper” and “a braille textbook costs 5.000 Naira on average, compared to 1.000 Naira for the original printed copy,” making “purchasing braille books costly and a considerable expense for the state governments.”<sup>40</sup>

<sup>39</sup> Wale, *Oyo distributes educational equipment to 33 special public schools*

<sup>40</sup> PLANE, UKAid, DAI, *Book Supply Chain Analysis Nigeria*, 25

MAFGD participants reported suppliers to be primarily government, donor, and NGOs providing books to state special schools, with supplies being described by participants as “not enough.” In Sokoto, participants reported children with special needs as learning-, visually- and hearing-impaired learners representing about 10% of the school child population. The Sokoto participants expressed further concern on the limitation of special-needs books being supplied to public community schools, where they also are needed.

Studies confirm prevalence of learners with disabilities worldwide as “10 to 15% of children aged 18 years and younger;”<sup>41</sup> and on a national level the availability of accessible learning materials for children with disabilities in public and special schools as being in “a state of crisis.”<sup>42</sup> On profiling equity and inclusion in book content, the market analysis book survey (MABS) respondents judged just 17 (13%) out of the 129 titles surveyed to have illustrations that depict people with disability in roles that are bias-free.

The MABS and MAFGD present underrepresentation of persons with disabilities in books and scarcity of materials for learners with special needs in the marketplace. Nevertheless, publishers in interviews and FGDs expressed willingness to make their materials available for adaptation in other formats and for producing materials for learners with special needs. The challenge is design models and tools to create or adapt reading materials in “born accessible” formats, i.e., materials that adhere to a universal design for learning (UDL) that is inherently accessible to all students.

A UNICEF Guideline on *Developing Accessible Digital Textbooks using UDL* suggests leveraging the existing textbook production “ecosystem”<sup>43</sup> for enabling production of accessible materials—for instance, in Nigeria leveraging the following ecosystem nodes:

- Adherence to national policy guidelines on book production in accessible formats—
  - » book policy special education objectives for producing instructional materials for the education of all types of learners with special needs;<sup>44</sup>
  - » inclusive education target for adequate learning materials and assistive devices, including ICT and assistive technologies, designed to meet all learners’ needs.<sup>45</sup>
- Expansion of existing federal and state mechanisms for book evaluation (NERDC) and procurement (UBECs, SUBEBs, ERCs) to include checklists and specifications for accessible textbook content (e.g., gender equitable and inclusive representation, language, illustration, and transformational roles) and print (e.g., typographical settings for ease of text visual processing—broad font, black text, illustration and text balance, etc.)

41 RTI, *A Guide for Strengthening Gender Equality and Inclusiveness in Teaching and Learning Materials*, 2

42 PLANE, UKAid, DAI, *Book Supply Chain Analysis Nigeria*, 23

43 Aghauche et al., *Provision of Alternative Formats of Information Resources for Inclusive Library Services of Visually Impaired Primary School Pupils in Southeast Nigeria*, 28

44 FME, NERDC, *Draft National Book Policy*, 10

45 FME, *National Policy on Inclusive Education in Nigeria 2019*



- Collaboration, knowledge building, and sharing (publishers, MoE, donors and implementers) on existing and new projects for production of accessible materials—reading textbooks, in regular and e-form, integrating graphics, images, interactive activities, audio (text reading in mother tongue), and video (sign language in mother tongue) to enrich content and learning experiences for all learners with or without disabilities.
- Awareness-raising and enactment on government ratification of the Marrakesh Treaty 2013<sup>46</sup> to facilitate blind, visually impaired, or otherwise print-disabled students accessibility to books and other reading materials; providing copyright exceptions to usage without the need for obtaining prior permission; allowing for the import and export of such materials, thus addressing FGD issues on access to expensive specialized material imports between states and between countries nationally, regionally, and internationally.

**On the supply of reading books, MoE** participants identified the government as the supplier of books to public schools through its executive agencies of UBEC and the State Universal Basic Education Boards (SUBEBs), and through procurement with publishers. The publisher participants confirmed publishers as the suppliers to government, while they also supply through their marketeers to book shops, booksellers in the marketplace, and public and private schools. Ibadan publisher participants related the banning of publisher-direct sales in government schools, leaving publishers to sell directly to bookshops and private schools.

Participants underlined how local language reading books were not part of government book supplies in public schools. The government Universal Basic Education (UBE) free book supply is confined to core textbooks of English language, mathematics, science, and social studies, and supplementary readers to some extent that UBEC may prioritize. The core textbooks are in English. Participants in the MAFGDs related how the government was supported by partners (UNICEF, USAID, DFID, and others) to produce and supply books to schools in local languages.

Sokoto and Ibadan participants described a Global Partnership for Education (GPE) *Better Education Service Delivery for All (BESDA)* program with their Sokoto and Oyo state governments that spent billions of naira from state budgets and partnership financing in the supply of literacy ERMs to state schools. The aim was to scale various types of ERMs piloted in the states—*Mu Karanta (Let's Read)* and *Je K'Je a Ka Iwe (Let's Read a Book)*, which are Hausa and Yoruba local language literacy interventions, respectively. Books were varied, and targeted to primary regular school and out-of-school children, with titles in English and local languages, covering textbook primers and readers (decodable and levelled) and associated materials (student workbooks, teacher guides), as well as non-textbook supplementary readers, storybooks, and others.

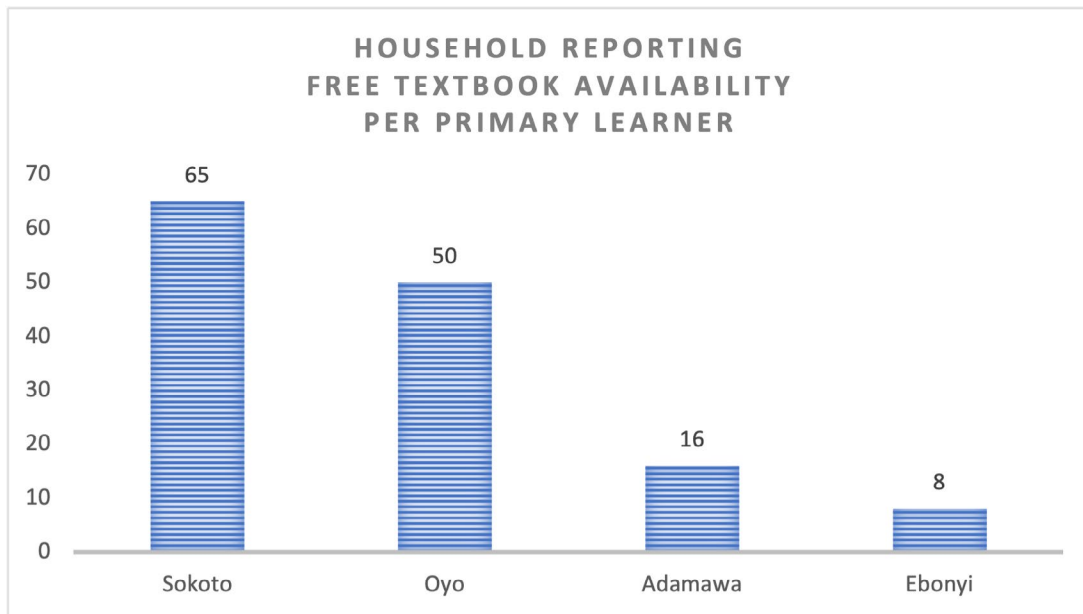
The Nigeria Education Data Survey (NEDS) 2020 report evaluation of the BESDA operation included a section on household reporting of government free textbook availability (English, mathematics, and integrated science). **Figure B-1** shows the MAFGD state results of households reporting free textbook availability, with Sokoto and Oyo states leading with 65% and 50%, respectively. The results may

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46 WIPO, The Marrakesh Treaty, 2013

reflect state decision-making for book prioritization in state budgets informed by success in reading interventions and learning outcomes (which can influence value for book procurements across the curriculum). All states in the MAFGD (with the exception of Abuja FCT) were linked to the BESDA-UBEC program for scaling up supply of literacy ERM within and across states, piloted in interventions like those described in Sokoto and Oyo.

Figure B-1: NEDS 2020 BESDA Survey—Household Reporting on Free Textbook Availability<sup>47</sup>



On book supply effectiveness and efficiencies, publishers related in the discussions how they struggled with supplying books in an economic environment thwarted by the high cost of raw materials and the high exchange rates for importing raw materials that affect the cost of supplying books. The challenges essentially limit the quantity of books distributed to schools, whether through government UBE free book schemes or through publishers’ marketing schemes through bookshops and schools.

**Reading book threshold prices.<sup>48</sup>**

At the heart of the MAFGD discourse with both groups of (1) MoE and publishers and (2) school and community

SELLING PRICES			
Black and white book Prices	Threshold	Colour Book Prices	Threshold
N 350.00		N 700.00	
N 650.00		N 1,500.00	
N 1,250.00		N 2,000.00	
N 1,800.00		N 2,700.00	
BLANK	550   500   320      210	BLANK	650 1,200    570 520 1,200/1000

Selling Price Thresholds  
MoE and Publisher MAFGD, Sokoto

47 NPC. *Nigeria Education Data Survey (NEDS) for the Evaluation of Better Education Service Delivery for All [BESDA] Operation*, 37.

48 **Thresholds.** A threshold is an amount, level, or limit on a scale. When the threshold is reached, something else happens or changes. For book publishers, the threshold is the lowest price they can sell books at to cover costs; for the purchaser, it is the highest cost they can afford to pay for books, which makes books affordable or not.

stakeholders were threshold prices for selling and buying books. The MoE and publisher participants were asked to consider what a threshold competitive market price would be for selling a book in black-and-white and in color, with specifications that the book have 32 pages, A4 size, 80 grams, a lamination cover in color, binding in stitches, and a print run of 10,000 copies. The participants were presented with a chart of four selling prices in each book category, derived from estimates captured from GBAIA Nigeria interview surveys with publishers. There was also a “blank” selling price option that participants could use to make their own estimates if they were not represented on the chart.

**Table B-1** shows the **selling price thresholds** defined by MAFGD participants across the states—that is, the lowest prices at which **MoE and publisher participants** agreed that books could be sold while covering production costs and reasonable profit margins. The table shows selling price threshold averages and ranges. The table also includes additional MABS findings on average selling prices and ranges for textbooks and non-textbooks.

**Table B-1: Selling Price Thresholds**

MAFGD Book Selling Price Thresholds						
MoE & Publishers						
Book Scenario: 32 pages, A4 size, 80 grams, lamination cover in color, binding in stitches, print run of 10,000 copies						
Abuja	Ibadan	Sokoto	Adamawa	Ebonyi	Average	Range
<b>Black &amp; White</b>						
N650 \$1.56	N1,000 \$2.40	N600 \$1.44	N1,250 \$3.00	N350 \$0.84	N770 \$1.85	N350–N1,250 \$0.84–\$3.00
<b>Color</b>						
N2000 \$4.80	N1,500 \$3.60	N1,200 \$2.88	N2,350 \$5.64	N700 \$1.68	N1,550 \$3.72	N700–N2,350 \$1.68–\$5.64
MABS Book Selling Prices						
Textbook and non-textbook						
				Pupil's Textbook	N912.02 \$2.19	N200 – N2,000 \$0.48 - \$4.80
				Pupil's non-textbook	N746.47 \$1.79	N180 – N3,950 \$0.43 - \$9.48

₦1 = USD\$0.0024 (08-21-22)

The MAFGD average threshold selling price for the 32-page book was **US\$1.85** (N770) for black-and-white and **US\$3.72** (N1,550) for color. The MABS average selling price was **US\$2.19** (N912) for a textbook and **US\$1.79** (N747) for a non-textbook supplementary reader.

On price range, the MAFGD lowest range prices at **US\$0.84** (N350) for black-and-white and **US\$1.68** (N770) for color were higher than the MABS lowest range prices at **US\$0.48** (N200) for a textbook and **US\$0.43** (N180) for a non-textbook supplementary reader, respectively, while the MAFGD highest range prices at **US\$3.00** (N1,250) and **US\$5.64** (N2,350) were lower than the MABS highest range prices at **US\$4.84** (N2,000) and **US\$9.48** (N3,950).

Overall, the MAFGD and MABS average prices were somewhat similar, while price ranges had broader differences. The differences could be attributed to time of publication, types of production (black-and-white, grayscale, or color), size of production (economies of scale), and rising production costs discussed by publishers in the previous section. In this respect, the literature advocates caution in extrapolating generalizations from average prices, if it is to be done at all.<sup>49</sup> We compare prices in the two reports for purposes of aligning the FGD participant price selling estimates with actual selling prices in the marketplace.

The MAFGD discussions in Sokoto clarified that the book selling price threshold was considered principally on the current market price of raw materials. In Adamawa, publishers noted how other publishers in a competitive market might neutralize the N1,250 selling threshold price established by the forum. In Ebonyi, participants emphasized that prices were continually rising; the costs of materials, electricity, power, and labor were some of the main issues raised as working against publishers and printers setting a threshold selling price. Participants deliberated on the idea of threshold selling prices for production of a shorter reading book of stories, with fewer pages, in black-and-white, and at prices that parents would find affordable. In Ibadan, participants noted that color books sell more than black-and-white as they are more appealing to learners. Participants raised issues of incessant changes in book production before the start of the academic year. They argued this was a protection against piracy, while they noted that reprint editions with different color designs raise production costs and selling prices. In Abuja, MoE participants underscored UBEC policy on access to quality books that must adhere to procurement specifications for quality production.

The MAFGD discussions circled around issues raised by Baum et al. (2018) in the literature on access, affordability, and quality, where low-fee schools or low-cost books run the risk of “heterogenous quality” of opportunities for learning.<sup>50</sup> On the other hand, meeting quality specifications for book production raises threshold selling prices and puts book purchasing out of the reach of users, of schools, and of communities, in particular the low-cost schools and low-income families in the poorest communities.

49 RTI, USAID, *Survey of Children's Reading Materials in African Languages in Eleven Countries: Annex G. Summary of the Early Grade Reading Materials Survey in Nigeria*, 198.

50 Baum et al., *Inequality of educational opportunity: the relationship between access, affordability and quality of private schools in Lagos, Nigeria*, 459.

## MAFGD: Schools and Communities

### Reading Books—Demand, Supply, and Threshold Purchasing Prices

**“There is a serious need for reading materials in Ebonyi state. The urban area has books—but in the rural area, books are very, very low. The children, being the younger people, are not ready to read. But in urban areas the readiness to read is higher.”**

*—Participant, School Community MAFGD, Ebonyi State*

On demand for reading materials, school community MAGD participants reiterated the high demand for ERMs at primary level to which MoE and publishers had called attention. Abuja participants spoke of demand that was too high, as pupils cannot perform in schools without reading skills, where “a child needs to read before they can learn.” Ibadan participants articulated the state commitment to UBE education policies enacted in the supply of free textbooks in core subjects (English studies, social studies, basic science and technology, and civic education) and evidenced in the Nigeria Education Data Survey (NEDS) evaluation cited in the previous section, with Oyo a leading state on household reporting of book availability.

However, the discussions underlined challenges with free book availability when it failed to meet the needs of all learners, particularly the most marginalized in deep rural areas, as mentioned in the quotation from the Ebonyi MAFGD participant above. In Sokoto, participants highlighted a need not only for reading books but also for exercise books; they noted that, due to the economic situation, even the writing materials had become expensive for parents. The urban-rural divide is compounded by expectations for free books that are not met but still anticipated by parents. Sokoto participants noted that public school parents don’t buy books due to the government policy of free books. Ibadan participants clarified how policy prevents schools from involving parents to buy books.

The MAFGD school community participant discourse thus circled issues of gaps in free books between policy and practice, and the lack of capacity or willingness of public and private schools to purchase books and plug the gaps. In Sokoto, participants ascertained that there was demand with 50% of parents willing to pay, while observing that books were more of a priority and a “must-have” in private urban schools. In Adamawa, participants discussed the reality of low book demand in private schools, especially as households considered “payments of school fees and books at a go.”

**“Yes, there is a demand. There is a low demand for books written in Nigerian languages, especially here in Abuja. When the quality assurance came to our schools, we just had English and French. We were asked to add one of the local languages; she [a teacher] is handling it, she is going to the market.”**

*—Principal, Private School, School Community MAFGD, Abuja*

In the quotation above, the private school principal refers to seeking out local language materials in the marketplace following a visit by a Quality Assurance team—likely from the Federal Capital Territory Universal Basic Education Board (FCT-UBEB). However, Abuja participants remarked on how hard it was to get local language materials in the market, an observation that was confirmed in the MABS, where Abuja registered the lowest level of reading materials encountered in Nigerian indigenous languages.

On the other hand, Sokoto participants spoke of reading materials from the past in the market, such as the *Ka Koyi Karutu (Learn to Read)* and *Kara Karatu (Read More)* series, first published in 1972 and “used to teach reading today [as] the books are available and still relevant.” Participants reported how a reading book from the series sells in the marketplace for N150–N250 and that “parents do get them for their children.” While the books are affordable, a RARA 2014 review of the series reported in the MABS found issues of book cover and paper quality and durability compliance with standards, while some content stories did meet quality criteria for reproduction.<sup>51</sup>

In Adamawa, participants recorded high demand for Hausa and Fulfulde materials, in Ebonyi for Igbo and English, in Ibadan for Yoruba and English. Yet the MAFGD school community participants noted that “you can hardly find the local language materials in the market.” This was particularly true of the more recently produced reading books in government partner literacy interventions such as the NEI Plus, which produced Let’s Read, Mu Karanta, Ka anyi guo, and Ję ká ka reading materials in English, Hausa, Igbo, and Yoruba, respectively. Materials in this and other interventions were branded “not for sale” to safeguard delivery to end users in public schools. This perhaps accounted for reading book scarcity in the marketplace, and suppressed demand for ERMs more especially, in local languages.

On supply of reading materials, the MAFGD school community participants reiterated that the government primarily procures supplies of textbooks and some library books (non-textbook, supplementary readers) through publishers and with support from partners and philanthropies. Books are issued to schools through SUBEBs. Publishers supply private schools and bookshops; bookshops and/or schools supply to parents or students.

Sokoto participants reported different types of books emerging in the government supply to schools that included core textbooks and non-textbook supplementary readers, and informational and history



Purchasing Price Thresholds  
School-Community MAFGD, Sokoto

51 RTI and USAID. *Nigeria Reading and Access Research Activity (RARA): Review of Existing Reading Materials to Support Hausa Literacy Instruction*, 19.

books. The diversity in book types appears to have brought some challenges. Adamawa reported inadequate book supplies due to high demand and the use of books available in schools “that may not be the most desired.” Participants in Abuja reported school struggles with supplier marketeering of book varieties in schools. They described large numbers of official books in the supply due to publishers and authors going directly to Boards (UBEBs) for book approval. Sokoto participants clarified the roles of government, UBEC, SUBEBs, LGEAs, PTA, and SBMCs<sup>52</sup> in the book supply to schools—when books were available. Overall, participants across school community MAFGDs reported challenges in the absence of development partner ERMs in the market, and in the inadequacy of government supply of core textbooks, supplementary reader books, and special education books.

On reading book purchase price thresholds, the school-community participants were asked to consider what a “threshold purchase price” would be for families to buy textbooks for one child in their household. They were asked to consider the highest price urban and rural households could afford in order to purchase four core textbooks that a child needs in the school year. The participants were presented with a chart of four purchasing prices in two categories of urban and rural families. The prices were estimates from reports<sup>53</sup> and participants in previous GBAIA Focus Groups discussions on what households can afford. There also was a “blank” purchasing price option that participants could use to make their own estimates if they were not represented on the chart.

PURCHASE PRICES			
URBAN FAMILIES	THRESHOLD	RURAL FAMILIES	THRESHOLD
N 000.00		N 000.00	
N 200.00		N 200.00	
N 1500.00		N 1500.00	
N 3600.00		N 3600.00	
N 5000.00		N 5000.00	
N 6000.00		N 6000.00	
Blank		Blank	

*Vertical text on left: Visual Reading Impaired (VRI) (1/1000) heavy impairment #300 (1/1000) 350*

*Bottom text: Blank internet access |||||*

Purchasing Price Thresholds  
School-Community MAFGD, Sokoto

**Table B-2** shows book purchasing price thresholds estimated by MAFGD participants in the five locales—that is, the highest price they considered urban and rural households could afford to pay for four books per child per annum. The table shows purchase price averages and ranges. The table also includes additional Nigeria Education Data Survey (NEDS) 2020 findings on household average expenditure per child in a government primary school per annum for three states and one city locale (Abuja FCT was not part of the NEDs survey).

52 Universal Basic Education Commission (UBEC), State Universal Basic Education Boards (SUBEBs), Local Government Education Areas (LGEAs), Parent Teacher Association (PTAs), School Based Management Committees (SBMCs).

53 NEDS Report 2020 *Nigeria Education Data Survey (NEDS) for the Evaluation of Better Education Service Delivery for All [BESDA] operation*

Table B-2: Purchasing Price Thresholds

MAFGD Book Purchasing Price Thresholds							
4 Books per Child							
Schools and Communities							
	Abuja– FCT	Ibadan– Oyo	Sokoto	Adamawa	Ebonyi	Average	Range
<b>Urban</b>							
4 Books Naira	N3,600	N10,000	N5,000	N6,000	N5,000	N5,920	N3,600–N10,000
4 Books USD	\$8.64	\$24.00	\$12.00	\$14.40	\$12.00	\$14.20	\$8.64–\$24.00
<b>Rural</b>							
4 Books Naira	N200	N5,000	N0.00	N200	N250	N1,130	N0.00–N5,000
4 Books USD	\$0.48	\$12.00	\$0.00	\$0.48	\$0.60	\$2.71	\$0.00–\$12.00
<b>Average Household Expenditure in Government Primary Schools Per Learner Per Annum</b>							
<b>Books, Uniform, PTA etc.</b>							
<b>NEDs 2020 Report<sup>54</sup></b>							
In Naira	N/A	N13,328	N6,427	N7,667	N21,696		N6,427–N21,696
In USD	N/A	\$31.99	\$15.42	\$18.40	\$52.07		\$15.42–\$52.07

₦1 = \$0.0024 (08-21-22)

**Table B-2** shows some differences in household purchase and expenditure capacities, as discussed below.

- The **urban household average book purchase price threshold of US\$14.21 (N5,920)** was over five times higher than the **rural household average book purchase price threshold at US\$2.71 (N1,130)**.
- The **rural household annual book purchasing range per child of US\$0.00–US\$12.00 (N0.00–N5,000)**, was low compared to the **urban household annual purchasing range per child of US\$8.64–US\$24.00 (N3,600–N10,000)** and the **NEDs household annual average expenditure per child range of \$15.42–\$52.07 (N6,427–N21,696)**.

54 NPC. *Nigeria Education Data Survey (NEDS) for the Evaluation of Better Education Service Delivery for All [BESDA] Operation, 2020*, 41



While there is a need for caution in comparison of averages and ranges, we use the MAFGD and NEDs reports to situate the estimated spending capacity of households by FGD participants with actual trends in household annual spending in public schools reported in NEDs.

Adamawa participants considered urban families could spend up to N10,000 (\$24.00) per child on textbooks, in view of their opportunities for employment and income in urban areas. Adamawa and Sokoto participants underscored the value attached to education in urban areas, where they considered that educated parents understand the value of books. On the other hand, Ebonyi participants argued that a N20,000 (\$48.00) price tag to cover four textbooks for three-to-four children was beyond the affordance of an urban family paying rent, electricity, and other municipal charges.

Ibadan participants maintained there were significant differences between urban and rural purchasing power. Participants suggested that rural families would struggle to pay even the threshold price that they set for rural households of N5000 (\$12.00) per child for four textbooks. Abuja placed the threshold for rural families at N200 (\$0.48), noting that the main concern of ultra-poor households in rural areas was food security for their families. Ebonyi participants identified a N250 (\$0.60) threshold that they suggested can cover only exercise pocketbooks for writing. The participants further raised concerns on the book life of materials—in particular, single-use books that children write in and that subsequently cannot be shared by other family members.

Adamawa participants underscored rural community values for elder traditions and livelihoods in farming, fishing, and traditional medicines that undermine community perceptions of the value and importance of education and books. Sokoto participants placed the rural family purchasing threshold at zero due to a combination of factors discussed in this section and others, such as a limited awareness of the value of education, unavailability of books in rural markets, limited household purchasing power, higher priority on the purchase of religious books over school textbooks influenced by western education, and belief that government is responsible for book supply to schools.

Overall, there appeared to be a general consensus on the differences between urban and rural purchasing capacities, with rural households perceived as having minimum capacity for the purchase of four core textbooks per child per annum. There are possible contradictions here with NEDS reporting of household annual expenditure per child in public schools ranging from \$15.42–\$52.07 across the locales. That household annual expenditure range was almost double the urban book purchase threshold range of \$8.64–\$24.00, but the NEDS expenditure covered textbooks, instructional materials, PTA fees, uniform fees, and nominal school fees. This would suggest more research is needed into household purchasing capacity and patterns of spending on education services and books, comparing urban and rural and public and private schools and communities.

## Digital Materials and Investment Priorities

In the final part of the MAFGD meetings, there was a short presentation of the Nigeria Learning Passport (NLP) platform.<sup>55</sup> Launched by the Federal Ministry of Education (FME) with UNICEF and other partners in March 2022, the NLP is an online, mobile, and offline learning platform that aims to provide continuous education to 3 million learners by the end of 2022, and up to 12 million by 2025. In the MAFGD meetings, there was a brief navigation through the platform digital curriculum folders, with clicks on content briefs to verify learning materials available in all core curriculum subjects for primary grades 1 to 6 and all junior and senior secondary school classes.<sup>56</sup> Participants in MAFGDs across the five locales considered that teachers and learners would have a high interest in digital content. In Sokoto, MoE and publisher participants noted that since COVID-19 there has been a greater demand and need for digital learning materials. They remarked on FME directives to have eLearning centers in every state. In Ibadan and Adamawa, MoE participants spoke of UBEC construction of three eLearning resource centers that would become SMART schools. The constructions form part of the government's launch of new eLearning centers in schools in each of the three senatorial districts in all 36 states and FCT.<sup>57</sup>

Most school and community MAFGD participants were not aware of the NLP and considered the development exciting. However, they foresaw disparities between urban and rural areas and between public and private schools, determined by those with access to devices, smart phones, data, and electricity, who would constitute the majority of the envisioned millions who would have access to online materials. Across the locales, MAFGD participants identified various priorities to enable access to traditional and new forms of learning materials. Abuja and Ibadan participants prioritized teacher training to build teacher technology knowledge in complement with pedagogy and content knowledge to use traditional and new technologies in the teaching and learning of reading. Sokoto and Adamawa participants prioritized interactive radio instruction as the more appropriate, preferred, and tested platform for community outreach pre- and post-COVID-19. They highlighted the use of small phones connected to radios and solar panels that were the most effective means to reach communities without electricity and in security risk zones. Ebonyi participants prioritized access to devices with preloaded materials, noting that online/offline access may eventually become more affordable for families, schools, and publishers than the perennial rising costs for conventional books production and distribution.

## GBA Findings: MAFGD Strengths

- FGD participants expressed a high need for ERMs in schools, as based on curriculum requirements for teaching literacy in English and local languages. This expression also may be considered linked to national policy on education requirements for language of instruction in the mother tongue or the language of the immediate school environment.

55 FME, *Nigeria Learning Passport*.

56 UNICEF, "12 million Nigerian students to have increased access to education."

57 The Premium Times, *FG approves 109 E-Learning Centres for Primary Education in Nigeria*.

- The demand for ERMs is high in private schools, where books are included in school fees and where reading is encouraged with a reading hour integration in school timetables. While the demand is lower in public schools, demand is growing in BESDA focus states opting to prioritize EGR procurements as part of state budget support for ERMs.
- The average selling price threshold for a reading book of 32 pages was estimated by MAFGD MoE and publisher participants **in a selling price range between US\$2 and US\$4**, as in: **US\$1.85** (N770) for black-and-white and **US\$3.72** (N1,550) for color as the lowest price at which books could be sold while covering production costs. The price range makes the books affordable for families in urban public and private schools.
- NERDC specifications for quality of material production and content development ensures book production adherence to quality standards for book content and durability.
- The Universal Basic Education book provision provides core textbooks to schools across all states. The Better Education Service Delivery for All has modeled provision of local language reading book supplies to schools and states based on needs and results.
- The average urban household purchasing price threshold for four books per child annually was estimated by MAFGD School Community participants as **US\$14.21** (N5,920). However, this creates a significant gap between urban and rural students/families, which is reflected in the following section on weaknesses.
- Digital learning materials from national early-grade reading interventions in English, Hausa, Igbo, and Yoruba are available online, on mobile, and offline in the Nigeria Learning Passport (NLP). Again, their availability is limited to those who have access to Internet connectivity and the required hardware and software, as reflected in the following section on weaknesses.

## GBA Findings: MAFGD Weaknesses

- The demand for ERMs in public schools is low.
- The demand for ERMs in local language in urban schools is low.
- The book selling price threshold ranges have broad differences between low-end and high-end prices for both black-and-white (**US\$0.84–US\$3.00/N350 –N1,250**) and color (**US\$1.68–US\$5.64/N700–N2,350**), raising questions of selling price consistency and affordability.
- Meeting quality specifications for book production raises threshold selling prices and potentially puts reading book purchasing out of the reach of the end-users' schools and communities.
- The challenges of book supply in the market are the absence of development partners' ERMs in local languages and the inadequacy of government supply of core textbooks, supplementary reading books, and special education books.
- Public school parents don't buy books, due to the government UBE policy of free books. The policy prevents schools from involving parents in buying books.

- The average annual rural household book purchasing threshold is **US\$2.71** (N1,130), which is more than five times less than the average urban book purchasing threshold of **US\$14.21** (N5,920).
- The Nigeria Learning Platform can create potential disparities between urban and rural areas and between public and private schools, determined by those with access to devices, smart phones, data, and electricity, who would constitute a majority of the envisioned millions who would have access to online materials.

## GBA Recommendations: Market Analysis Focus Group Discussion

### Short Term

- That GBA and partners support FME reading awareness campaigns on the importance of education, of books, and of learning to read to support children’s learning outcomes in reading and across the curriculum and their contribution to family, community, and national development.
- That FME, UBEC, and NERDC put intentional consideration into increasing advocacy in urban and rural areas on the importance of early-grade instruction and reading books in the local language of the school environment for improving children’s literacy outcomes in a language that they know and understand.
- That MoE, publishers and partners collaborate in knowledge building and sharing on existing and new projects for production of accessible materials for learners with physical, cognitive, or sensory and/or multiple disabilities—reading textbooks in regular and e-form integrating graphics, images, interactive activities, audio (text reading in mother tongue) and video (sign language in mother tongue) to enrich content and learning experiences for all learners, with or without disabilities.

### Medium Term

- That the GBA work with FME, UBEC, NPC, WB,<sup>58</sup> and partners to open dialogue on household expenditure on education in general, and specifically on household book purchasing capacities and trends in urban and rural areas and in public and private schools. One focus would be to work on future household survey data, such as NEDS, to include more specific indicators for household reporting on book availability in the home—free books, purchased books, types of books (textbooks or non-textbooks), book languages, level of books. The purpose would be to inform policy maker evidence-based decision-making on ERM provision options within the framework of UBE free book policy, state budgets, and household contributions.

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58 Federal Ministry of Education (FME), Universal Basic Education Commission (UBEC), National Population Commission (NPC) and World Bank (WB)

- That the GBA and partners support research and development of affordable books that provide options for schools and households to purchase supplementary materials to enrich those provided through the state and government UBE free book supply. The purpose is to enable learners access to a wider repertoire of books for reading practice and reading for information, for pleasure, and for interest, with an adequate range of reading books available in the school and at home.

## Long Term

- That GBA and partners works with FME, NERDC, UBEC to raise awareness on and support access to digital ERM packages in English and local languages developed by government and partner interventions that are available on the Nigeria Learning Passport platform and the Global Digital Library.<sup>59</sup>
- That the GBA supports FME and NERDC to conduct research for exploring the potential for digital learning materials and government digital centers (SMART schools) for enabling alternative access to ERMs by educators, families, and learners, and for supporting quality learning and improvement in reading and learning outcomes.

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59 Nigerian Learning Passport (NLP) at: <https://nigeria.learningpassport.org/>; Global Digital Library (GDL) at: - <https://digitallibrary.io/>

# ANNEX 1: GALLERY OF MAFGD PHOTOS - ADAMAWA, SOKOTO, EBONYI, IBADAN, AND ABUJA



Book purchasing prices, MAFGD, Abuja



Book demand discussion, MAFGD, Adamawa



Selling price threshold voting, MAFGD, Sokoto



Facilitating threshold price discussion, MAFGD, Ibadan



Publishers, Printers, FME officials, UBEC, Authors at the Abuja MoE and Publishers MAFGD



Parents, SBMC, Teachers, Headteachers at the Abuja School Community MAFGD



School and Community MAFGD, Ebonyi



Publishers and MoE MAFGD Group Screenshot, Ibadan

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