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PUBLISHING AND DISTRIBUTION OF EDUCATIONAL BOOKS IN KENYA: A STUDY OF MARKET LIBERALISATION AND BOOK CONSUMPTION

DANIEL CHEBUTUK ROTICH

PhD

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**PUBLISHING AND DISTRIBUTION OF EDUCATIONAL
BOOKS IN KENYA: A STUDY OF MARKET
LIBERALISATION AND BOOK CONSUMPTION**

Daniel Chebutuk Rotich

**A thesis submitted in partial fulfilment of the requirements of
Thames Valley University for the degree of Doctor of Philosophy.**

March 2000

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DEDICATION

To H.E. D. T. arap Moi and Emilly - with many thanks for everything.

ABSTRACT

An investigation into the publishing and distribution of educational books in Kenya under market liberalisation that outlines the historical background and describes how the industry has moved from import orientation to government control and on towards becoming an industry of private commercial publishers. The study set out to investigate the growth, market opportunities, and factors affecting the distribution and publishing of educational books. The political implications that educational policies have on textbook provision are explored.

Fieldwork was carried out in Machakos and Uasin Gishu districts and in the Nairobi area where 29 schools (both primary and secondary) were visited. The areas where fieldwork was carried out represented rural, semi-urban and urban areas of Kenya illustrating a range of socio-economic influences. There were 252 respondents comprising teachers and parents who were interviewed using a structured interview process. Other respondents were publishers, booksellers, government officials and librarians who were interviewed using a semi-structured interview process. Information was also obtained from unpublished government sources and from publishing houses' archives. Data collected were analysed thematically and coded responses were processed using SPSS.

Developmental advances and shortcomings of the publishing industry in general and of the education sector in particular are identified. The market liberalisation and globalisation of the Kenyan economy has diminished the purchasing power of the population, which has led to negative growth in the publishing industry. The government's early control and active involvement in the educational publishing industry may have contributed to current under-development.

Recommendations are made as to how the government and the publishing industry can co-operate in order to improve and boost the development of educational publishing. Those who need to invest in distribution of educational materials in rural areas should be helped to acquire venture capital. An assessment should be made of the government's social dimension programme so as to ascertain its impact on educational publishing in Kenya.

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D. Chebutuk Rotich.

March 2000

LIST OF ABBREVIATIONS AND DEFINITION OF TERMS

ADEA	Association for the Development of Education in Africa
AIC	Africa Inland Church
ASAL	Arid and Semi Arid Lands
CBS	Central Bureau of Statistics
CDRC	Curriculum Development and Research Centre
CIDA	Canadian International Development Agency
CIS	Chief Inspector of Schools
CMS	Christian Missionary Society
COMESA	Common Market for East and Southern Africa
CPE	Certificate of Primary Education
CRE	Christian Religious Education
CUP	Cambridge University Press
DEB	District Education Board
DEO	District Education Officer(s)
DfID	Department for International Development (UK)
EA	East Africa
EAC	East African Community
EAEBD	East African Educational Book Distributors
EAEP	East Africa Educational Publishers
EALB	East African Literature Bureau
EAPH	East Africa Publishing House
EMS	Expedited Mail Service
EPOS	Electronic Point of Sale
FAO	Food and Agriculture Organisation
GDP	Gross Domestic Product
GHC	Geography, History and Civics
GNP	Gross National Product
IMF	International Monetary Fund
ISBN	International Standard Book Number
ISP	Internet Service Provider
JKF	Jomo Kenyatta Foundation

K	Kenya
K£	Kenya Pounds (equivalent of Kshs 20)
KAPE	Kenya African Primary Examination
KBSA	Kenya Booksellers and Stationers Association
KIE	Kenya Institute of Education
KLB	Kenya Literature Bureau
KNB	Kenya National Bibliography
KNLS	Kenya National Library Services
KPA	Kenya Publishers Association
KSES	Kenya School Equipment Scheme
Kshs	Kenya Shillings
LPO	Local Purchase Order
MOEHRD	Ministry of Education and Human Resource Development
NGO	Non-Governmental Organisation
PPM	Panafrican Paper Mills (EA) Ltd.
PTA	Parents Teachers Association
ODA	Overseas Development Agency (UK)
OP	Office of the President
OUP	Oxford University Press
POP	Pocket of Poverty
SAP	Structural Adjustment Programmes
SEPU	School Equipment Production Unit
SIDA	Swedish International Development Agency
STD	Subscriber Trunk Dialling
STSC	School Textbook Selection Committees
TAC	Teachers Advisory Centres
TPH	Tanzania Publishing House
UBS	Union Bank of Switzerland
UPH	Uganda Publishing House
UN	United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization
UK	United Kingdom

UK£	UK Sterling Pound
US\$	United States Dollar
US	United States
V.A.T	Value Added Tax

Definition of Terms

Some terms have been used in this study as they have been used in other studies or works. But it has been felt that since there might be slight variation, it is important to define them for the readers of this research document. The following therefore are some of the definitions;

Book Consumption; this refers to the way schools and individuals purchase books; it is used in this study to define what people consider when buying textbooks and the frequencies of buying.

Core textbooks are those books that have been recommended by the Ministry of Education in Kenya to be used in all schools as the main book for a particular subject.

Duka(s) this term refer to a small size shops that sell books and other general merchandise mostly found in rural areas of Kenya.

Educational publishing has been used in this study to mean those who engaged in the publishing activity in order to produce books with the intention of being used in schools or any other educational institution specifically to support and extend the curriculum.

Educational books means all those books published with the main target audience being students and teachers in schools and they are referred to as textbooks. This term as used in this particular research refers to books for primary and secondary school levels only.

Foreign publishing firms refer to publishing houses that are branches of publishing houses based outside Kenya; such firms could have been incorporated in Kenya but still controlled by their parent companies.

Harambee this is a Kiswahili term for fund raising (literal meaning pulling together).

Indigenous private commercial publishing houses are firms that local citizens are fully controlling by having majority of the shares. The company could have been previously bought out from a foreign company or was started in Kenya from its inception.

Managing Director; this term refers to the head of the publishing houses or the bookshops visited in this study. Although in some houses like Longhorn and Evangel and Chania bookshops, Elimu Book Distributor and Textbook Centre the head is referred to as the General Manager. For the purpose of this research the heads of the institutions will be always referred to as the Managing Directors.

Market liberalisation; this term is used in this research to mean the opening up of textbook market to all types of publishing houses in Kenya. The discontinuation by the government of restrictions given to schools to buy one universal core textbook in primary schools for a particular subject. The abolition of classification of textbooks by the government into core textbook, supplementary and references books and the introduction of at least six textbooks being recommended as meeting the curriculum guidelines and leaving the parents and the teachers to decide which book to buy among the six.

Matatu(s) this a Kiswahili term for public service vehicles excluding buses and taxis.

Parastatal (state-owned) publishing houses mean those publishing firms which have been established and run by the government, they may be under a Ministry or operate under the Parastatal Act.

Publishing means in general terms the creation or initiation of an idea for publication through preparation of a manuscript in which the following functions are followed, writing, editing, designing, production, warehousing, marketing, selling and distribution.

Publishing Manager; this term has been used to refer to the head of editorial departments in the publishing houses. However, this term was used differently in

the publishing houses visited, in some, the head of the editorial department was the chief editor. For the purposes of this research the word Publishing manager will always mean the head of the editorial department.

Reference and/or library books are books that can be bought by primary and secondary schools in Kenya and placed in the libraries to be used as reference books by teachers and students.

Religious publishing houses are those companies which are controlled by a religious organisation.

Sales and Marketing Manager; this term refers to the head of the Sales and Marketing departments of the publishing houses visited in this research. However, some publishing houses used the term Sales and Marketing Directors, for the purpose of this research, the term Sales and Marketing Manager will be used to refer to the head of the Sales and Marketing Department.

Supplementary books are books which have been recommended by the Ministry of Education to be used in a particular subject along side the core textbooks.

Textbooks are books which have been authored and published to be used in schools for specific subjects and are in line with a set curriculum from the time of writing them. These books could fall in the following categories in Kenya; core textbooks, supplementary, reference and/or library books.

CHAPTER ONE

EDUCATION AND PUBLISHING DEVELOPMENT IN KENYA

1.1 Introduction

This study addresses the various facets and stages of educational publishing in Kenya. The centre piece of the publishing industry in Kenya has always been the publication of educational books and/or textbooks. However, all educational books do not qualify in definition as textbooks, for textbooks are usually the standard books in any branch of study that contain ideas and facts in a sequential nature. The industry has undergone various stages of growth since its establishment by Missionaries in the 1890s. The methods which were adopted in the distribution of these books has varied from the time the industry was established.

In this study, we discuss the effects on the publishing industry of the changes which have taken place over the periods of growth. The major concern of the study is the gradual process and effects of market liberalisation in the educational publishing industry. The study will include taking views from the publishers, the distributors, the policy makers and the users. The overall national economy also affects the performance of the publishing industry at the level of funding education and ultimately through the level of consumer incomes.

The distribution of textbooks to the various parts of the country is considered. Since there are textbook users who live in both rural and urban areas, accessibility to educational books may not be the same in a more liberalised market. Before market liberalisation, the government used to distribute the books to all parts of the country through a centralised system. It is therefore important to investigate how the textbook users who live in various parts of the country get access to books. On the same note, it is important also to investigate how the publishers are attempting to meet the needs of the textbook users.

As education is considered paramount in the development of every country, and as textbooks are the main sources of information in schools, their modes of development will be considered in this study. Consideration will be given to the

processes and procedures followed in Kenya in curriculum and syllabus development.

1.2 Geographical Location and Political Context

Kenya is located in East Africa and lies between a longitude of 34° east and 42° east and a latitude of 4° north 4° south. It covers an area approximately 582,646 square kilometres and is bordered by Ethiopia and Sudan to the north, Somalia and the Indian Ocean to the east, Uganda to the west and Tanzania to the south¹ (Appendix 1).

Kenya gained her independence in 1963 after a protracted struggle with the British colonial administration. Since then the country has been ruled by two elected presidents. The country has enjoyed political stability since independence.

Kenya's population, according to the 1989 census, was 21.4 million and by 1997 it was estimated to be 29.0 million² of which almost 50% are below 15 years of age. For the purpose of development planning in the country a census is carried out every ten years and one was carried out in August 1999 and the results are expected in July 2000. The population has been rising steadily, from 5.4 million in 1948 after the first census to 16.1 million in 1979.³ The majority of the Kenyan population live in the rural areas. Their main source of income is agricultural produce and livestock.

Kenya is one of the world's low income countries. The Gross Domestic Product (GDP) at market prices was K£26,398 million (US\$ 9,102.8 million) and K£30,071 million (US\$ 10,934.9 million) in 1996 and 1997 respectively. The GDP per capita in the same period was K£794 (US\$ 273.8) and K£888 (US\$ 322.9) respectively^{4,5}.

¹ Ojany, F. & Ogendo, R. (1973),: *Kenya: A Study in Physical and Human Geography* : Nairobi, Longman, 1

² Kenya. Central Bureau of Statistics (1998) : *Economic Survey 1998* : Nairobi, Ministry of Planning and National Development, 12

³ Kenya. Central Bureau of Statistics (1995) : *Economic Survey 1995* : Nairobi, Ministry of Planning and National Development, 11

⁴ Kenya. Central Bureau of Statistics (1998) : *Economic Survey 1998* : Nairobi, Ministry of Planning and National Development, 3-4

⁵ The calculation into US dollars was based on the prevailing exchange rates at the end of financial years 30th June of 1996 and 1997, from the Central Bank of Kenya statistics, at the end of financial year 1996 it was Kshs 58 to the dollar and Kshs 55 to the dollar at the end of 1997.

The country's main source of foreign income is the export of agricultural products namely coffee, tea and horticultural produce (fresh fruits and vegetables and flowers). The tourism sector is also one of the main sources of foreign exchange in the country. The country is also heavily indebted, both with internal and external debt. In 1993, the total accumulated external debt arrears was US\$ 750 million⁶. In the same year the total external accumulated debt was standing at US\$ 6,994 million.⁷ However, by 1996, the debt had marginally reduced to US\$ 6,241 million⁸ though it rose to nearly US\$ 7,000 million in 1998.

1.3 Educational Development in Kenya

Formal education in Kenya was introduced by missionaries; in fact the first school was established in 1846 at Rabai near Mombasa⁹. This is also the period when publishing started in the coastal region. Government statistics indicated that in 1994 there were 15,906 primary and 2,834 secondary schools with 5,557,008 and 619,839 students respectively. There are also 28 primary school teacher training colleges with a population of 17,435 students. These student groups and their teachers (with a combined population of 218,076) form the market target for the educational publishers in Kenya.

A number of commissions have been set up to review Kenya's education system since independence. The first Commission after independence was in 1964 (chaired by Professor Ominde) and aimed to review the whole education system. Other Commissions were chaired by Ndegwa (1971), Gachathi (1976), Mackay (1981), Kariithi (1983), and the Presidential Working Party on Education and Manpower Training for the Next Decade and Beyond in 1988. These commissions have influenced the education policies and practices in Kenya.

⁶ United Nations (1995) : *Economic and Social Survey of Africa 1994 - 95* : Addis Ababa, UN Publications, 170

⁷ World Bank (1995) : *World Development Report : Workers in an Integrating World* : New York, OUP, 200.

⁸ Central Bank of Kenya ; <[http:// www.africaonline.co.ke/cbk/AnnualReport/8.html](http://www.africaonline.co.ke/cbk/AnnualReport/8.html)> available on 12/12/97.

⁹ Eshiwani, G. S. (1993) : *Education in Kenya since Independence* : Nairobi, EAEP, 15

1.3.1 Education Systems

The various school systems (as management systems) that have been adopted in Kenya have had a collective and individual influence on how textbooks are procured for and distributed to schools. The systems also dictated the kind of curriculum studied in schools. The various Commissions mentioned above were used in determining the systems of education at a given time; they thus affected the publishing industry as the producer of educational materials.

The first Commission chaired by Professor Ominde in 1964 immediately after independence proposed various changes to the education system. The recommendations included bringing to an end the segregation of schools by race, and the unification of the curriculum in all schools. However, it did not make any recommendations to do with the publishing and the acquisition of educational materials. In the report an appreciation was made of the fact that education is an economically expensive undertaking and may be beyond the reach of ordinary Kenyans. The Commission considered the cost of items needed by pupils ranging from food (lunch), uniforms, books, writing material and school fees.

The Gachathi report of 1976 made a number of recommendations and touched on the publishing industry. It also appreciated the fact that educational books have a long production cycle from the time of commissioning to the actual publication. Therefore, there was a need to give ample time to the process. They were also aware that at the time the publishing industry was dominated by foreign publishers who could not adequately meet the needs of Kenyans by publishing books with a cultural fit to the needs of the Kenyan education system and its schools. The report expressed the opinion that the situation would require a remedy.

The Gachathi report (1976) led to the recommendation that school textbooks be published and printed by Jomo Kenyatta Foundation (JKF). JKF had been established in 1965 with a number of functions of which one was to publish school books. The aim of JKF during its establishment was as a charitable organisation using its profits for the education of bright students from poor backgrounds. These textbooks were originated by the curriculum centre - Kenya Institute of Education (KIE). This was the start of giving JKF a monopoly of publishing KIE manuscripts.

The KIE had been established in 1966 to develop syllabuses and other educational materials which were to be given to publishers for publication. The report made recommendations that for JKF to make more profits, it was necessary to be given a commercial function; this took the form of a monopolistic role in publishing educational materials from KIE. Later in 1980, the Kenya Literature Bureau (KLB) was established through an Act of Parliament. Since it was a government-owned publishing house, it was also to obtain educational manuscripts from the curriculum centre.

The Mackay Commission (1981) which led to the establishment of the second university in Kenya at Eldoret (Moi University) made no mention of how to provide books to schools - a notable omission. Though the Commission came out with recommendations to overhaul the entire education system with a new curriculum, there was no mention of how the books for new subjects would be procured and distributed. The recommendation was to change the education system from 7-4-2-3 (seven years in primary, four in secondary, two in high school and at least three in university) to 8-4-4 (eight years in primary, four in secondary and at least four in university). The examinable subjects in primary level were to be increased from three (Mathematics, English and General paper) to eleven (Agriculture, Art and Craft, Business Education, English, Geography-History-Civics, Home Sciences, Kiswahili, Mathematics, Music, Religious Education (Christian or Islamic) and Science). Another notable change was a shift to greater emphasis on science and practically oriented subjects. This therefore dictated a need for new sets of textbooks to be used in schools. Clearly, conditions were developing for the potential expansion of the educational publishing industry. Despite all these reforms, there was no mention of how the publishing industry was to produce and distribute textbooks to schools.

The current education system, 8-4-4 as it is popularly known, came into effect when the first batch of students entered standard eight on the primary level in 1985. The need for textbooks was intense and most publishers were caught in the middle of the change over. There was no clear policy on this issue and what followed was a mushrooming of publishers trying to cash in on the new system of education.

Some enterprising Kenyans started their own publishing houses and printed textbooks; most of them were old books fitted with new covers. Some booksellers also joined the lucrative market and started publishing textbooks. In retrospect the mid-1980s were an exceptional time for educational publishing. There was a rapid growth in the number of titles, but this led to a failed development.

1.3.2 Government Expenditure in Education

Governments all over the world allocate a sizeable part of their expenditure to education. The Kenyan government's expenditure on education between 1985 and 1994 ranged between 5.2 and 7.4 as a percentage of the GNP. It is now central to social capital theory that a literate and skilled population is more productive and better placed to contribute to the overall development of the country. It has also been argued that expansion of education may be viewed as a way of increasing income earning potential¹⁰. Though that may be the case the opportunities for and access to employment is a matter of some debate. Many developing countries including Kenya continue to allocate more to spending on education. The fortunate few who enrol benefit from the education but may face a bleak future once they complete their education and enter into the job market.

Due to the need for a literate population to stimulate development, the government had been spending more on education than on other sectors. In the 1963/64 financial year (the first after independence), the government allocated £8.95 million to education out of a total government expenditure of £65.19 million.¹¹ The education expenditure had risen to £40 million in 1972/73 representing 19.1 per cent of public expenditure (from 13.7 per cent in 1963/64) and by 1973/74 the expenditure was 22.6 per cent of the total government expenditure¹². These government expenditures cover the whole range of educational expenditure in the country. Ironically, the highest percentage of the education budget is taken up by teachers' salaries. By 1998, the teachers salaries were taking almost 80 percent of

¹⁰ Ahmed, O. S. (1982) : *The Potential Effects of Income Redistribution on Selected Growth Constraints: a Case Study of Kenya* : Washington, University Press of America, 63

¹¹ Kenya. Central Bureau of Statistics (1964) : *Economic Survey 1964* : Nairobi, Ministry of Planning and National Development, 8

¹² Kenya. Central Bureau of Statistics (1974) : *Development Plan : period 1974 - 78 part 1* : Nairobi, Ministry of Planning and National Development, 23

the entire education budget.¹³ In 1996/1997, out of a total of K£1,569.97 million allocated to the Ministry of Education in the budget, K£1,503.57 million¹⁴ was taken up by recurrent expenditure of which a higher percentage was teachers salaries. Mbato (Deputy Permanent Secretary Ministry of Education, 1999) made the point that teachers' salaries consume 83 per cent of the total annual recurrent budget of the Ministry, leaving only a small percentage to maintenance and operational costs, bursaries and teaching and learning materials.¹⁵

Table 1.1: Government's Expenditure on Education(K£ ,000,000)

	Total Education Expenditure (K£)	As % of GNP	As % of Total Govt Expenditure	Total Current education expenditure (K£)	As % of Total Education Expenditure
1985	308.55	6.4	19.6	289.45	93.8
1990	623.65	6.7	19.9	561.90	90.1
1992	660.15	5.2	21.9	615.35	93.2
1993	1,001.45	6.5	18.8	949.95	94.9
1994	1,460.00	7.4	18.5	1,377.00	94.3

Source: Statistical Abstracts (Various issues), <http://www.intracen.org>, African Development Indicators 1996

Most of the government expenditure is taken up by current expenditure as demonstrated from the statistics in table 1.1. In other countries like Tanzania and Uganda total government expenditure on education was 5.8% and 23.4% respectively in 1990¹⁶. This demonstrates that education is taken seriously in Kenya. It is unfortunate though that most of these funds go towards meeting current expenses, the greatest of which are staff salaries. The general decline in budgetary allocation to the education sector in the late 1980s through to the 1990s can be

¹³ In 1997 the government through Teachers Union's pressure agreed to award a salary increase of between 150 and 200 per cent. Though the agreement was signed, it was not honoured in full since the government could not afford such an increase.

¹⁴ Kenya. Central Bureau of Statistics (1998) : *Economic Survey 1998* : Nairobi, Ministry of Planning and National Development, 197.

¹⁵ Mbato, R. ; <<http://www.nationaudio.com/News/DailyNation/Today/News/News8.html>> available 8/6/99.

¹⁶ World Bank (1996) : *African Development Indicators 1996* : Washington, World Bank, 203

attributed to cost-sharing schemes adopted by the government. The cost-sharing scheme concept was introduced as a recommendation by World Bank and International Monetary Fund (IMF) to the government in order to reduce public expenditure. It was part of the structural adjustment programmes (SAPs) which were to be implemented by the government. The scheme entails government meeting a proportion of the costs towards child education, and parents meeting the remainder. Mostly, parents buy textbooks and exercise books as well as paying school fees and contribute, from time to time, to school building projects in the form of a levy. The government provides teachers, pays their salaries and contributes toward the building and maintaining of schools.

The government's expenditure on education has fallen since 1992 in real terms. Some of the things which have been axed in government education expenditure include purchases of textbooks, school stationery (mostly writing materials and exercise books), science equipment, sports equipment and subsidised school lunches.

1.4 Historical Background to the Publishing Industry

Publishing in Kenya can be traced back to 1894 when the Christian Missionary Society (CMS) set up a printing press on the coast for printing gospel materials. The chief aim of the press was printing translated hymn books and Bible scriptures into local languages. Another purpose of the press was to print school books since for the effective spread of the gospel Missionaries had to educate the new converts so as to be able to read the Bible and other spiritual materials. In the 1940s some missionaries such as CMS and African Inland Mission, who had set-up their bases in East Africa (Kenya), joined together to form a new publishing house named Ndia Kuu Press. This was the first indigenous publishing house in Kenya.

The East African Literature Bureau (EALB) was established in 1947 under the auspices of the East Africa High Commission. The commission was also providing other common services to the three countries - Kenya, Uganda and Tanzania (Tanganyika and Zanzibar then) a role which continued even after they gained their independence. The services covered transport, communications, education and

trading among others. When the three states gained their independence in the early 1960s, a new body was formed to take on the activities of East Africa High Commission. The new body was formed after a series of meetings between the officials of the three countries. The new body was the East African Community (EAC) which was established in 1964.

The establishment of the EALB came after the end of World War Two when Africans who had fought with the allies had been enlightened about reading. During the establishment of EALB, some of the objectives were to publish and distribute books of general readership and school books; to encourage African authorship; assist in book distribution and provide library services in East Africa. The Bureau served the three East African states. When the EAC collapsed in 1977, due to differing political ideologies between the presidents of the member states, the activities of the bureau collapsed as well. Its activities and assets in Kenya were taken up by KLB in 1980 when that body was established through an Act of Parliament.

During this period (1964 - 1977), a common education curriculum was followed amongst the member states. Most of the publishing houses which were operating at that period had their headquarters in Nairobi. EALB also had its headquarters in Nairobi and was publishing educational materials meant for all the schools in the community. In effect educational publishing in Kenya was serving a wider market and the collapse of the EAC had a severe effect on their operations.

In the 1950s there were a number of British publishers who established distribution offices for their books in Nairobi. They were serving not only Kenya but the whole of the East and Central African region. Among the first were Longman, Oxford University Press (OUP) and Cambridge University Press (CUP). In 1965 (two years after independence), Heinemann and Cassell Ltd opened an office in Nairobi with the main purpose of selling popular fiction and some educational titles. All books were imported from London. The company was bought out by Heinemann Educational Books in 1968. The new company was to import books as well as having a long term plan of moving into local publishing.

The wave of establishing publishing and distribution points was not unique to Kenya alone but was similar to other African countries. Apart from establishing companies independent from the government, other companies recognised the interest the governments were placing on promoting education. One such company was Macmillan Publishers who collaborated with a number of governments in Africa to form *parastatal* publishing firms. Among them, the Tanzania Publishing House (TPH) in Tanzania and Uganda Publishing House (UPH) in Uganda. Macmillan Kenya Publishers was incorporated in Kenya in 1982 after operating as a distribution agent and branch for its parent company in the UK.

These publishing firms had exclusive rights to publish books for primary schools in their respective countries. These were joint ventures between Macmillan Publishers and the government where the latter provided some capital and offered a market place for the books. These were the days when the newly independent African countries were investing a great deal in the education sector. There was a need to educate their citizens so as to get much needed highly-qualified personnel who could develop the economy. The wave of Africanisation of institutions at the time could not be accomplished without well-educated Africans to take over from the expatriates. The other concern was to produce books internally which were relevant to local cultural and social norms.

At independence in 1963 there were few publishing houses in Kenya. During the first five years of Kenya's independence, four categories of publishing houses emerged; religious/missionary, state-owned or semi-state, indigenous private commercial and foreign publishers. At that time the state-owned publishers included JKF and East Africa Publishing House (EAPH) which was jointly owned by the government and the private sector. The indigenous private commercial publishers included Equatorial Publishers. The foreign owned included OUP, Longman, Heinemann among others.¹⁷

¹⁷ Chakava, H. (1996) : *Publishing in Africa: One Man's Perspective* : Nairobi, EAEP, 10

1.4.1 Types of Publishing firms

Today, the publishing industry in Kenya is predominantly educational. It is estimated that educational publishing accounts for more than 80% of the publishing activities. It is therefore the bread and butter of all the publishing houses in the country. Both the private and state publishing houses rely heavily on the sale of their textbook titles to make them viable.

The publishing firms in Kenya can be clearly categorised according to the ownership. There are those owned by either the government, the private sector or religious organisations. Those owned by the government are referred to as *parastatals*. These *parastatals* are JKF and KLB. Those owned by the private sector are normally referred to as private commercial publishers and can be further classified as indigenous and foreign owned. The indigenous publishing houses are those started in Kenya and owned by Kenyan citizens individually or as a group or through buying the previously foreign owned publishing houses; examples of these are Longhorn Kenya Publishers (formerly Longman), East African Educational Publishers (EAEP) (formerly Heinemann), Gideon Were Press, among others. Those still foreign owned include OUP and Macmillan Kenya Publishers. The indigenisation process started in 1977 when Longman sold off 40 percent of its equity to Kenyans. In 1986 Heinemann Educational Publishers started the process of transferring their shares; this was completed in 1992 when it changed the name to EAEP.

The religious/missionary owned publishers are Evangel Publishing House, Uzima Press, AIC Kijabe Printing Press, Bible Society of Kenya among others. These publishing houses mostly publish religious literature in forms of tracts and leaflets. They also publish educational literature and books used in schools. Their books are also among those recommended by the curriculum centre.

1.4.2 Textbook Acquisition

The acquisition of textbooks and other educational materials was managed by the government or any other school sponsoring body in Kenya. These bodies included church organisations, District Education Boards (DEB), and Community

(*Harambee*) schools. They had the responsibility of purchasing books for schools under their care.

In 1972 the government established the Kenya School Equipment Scheme (KSES) which was charged with the procurement and distribution of textbooks. This was a direct government involvement in the purchase of textbooks being increasingly produced by the private sector. Tenders were invited from the various publishing firms whose books were in the list of recommended school textbooks. This list of recommended textbooks was prepared by the curriculum centre. The titles in the recommended list were mainly developed by KIE and published by JKF.¹⁸ In 1988, the government stopped the procurement of textbooks and moved to a procedure whereby parents bought books for their children. In other circumstances, the community through fund-raising bought books for their schools. This was a move adopted by the government in a process of increasing market liberalisation; itself a significant factor to be discussed later in this study.

1.5 The Support Industries

The role played by other industries in the development of the entire publishing industry must not be ignored. The most important are the printing and paper industries, and the distribution industry which includes libraries and means of transportation. These industries operate at different levels and affect the development of the educational publishing both in a government controlled environment and in a market liberalised market environment.

1.5.1 Printing and Paper Industries

The success and development of a well established publishing industry needs to be backed up by other industries, most importantly the printing and paper industry. In the absence of a local paper industry, publishers have to import paper for production. This importation is subject to many government bureaucratic systems and is affected by currency fluctuations. The time taken in the import processes is at times a limiting factor that might eventually affect production schedules and production costs. The state of the printing industry is also important for full local

¹⁸ Chakava, H. (1996) : *Publishing in Africa: One Man's Perspective* : Nairobi, EAEP, 10

textbook production. In the event of printing textbooks outside the country, the delivery time will be longer. This will eventually affect the cost of production and the timing of sales seasons when the books are needed. The availability of local printers will save a lot of money for local publishers in terms of transportation and time.

At present Kenya has a number of printing firms used by the publishing industry. The state-owned publishing firms have their own printing machines. The printing machines available for publishers are mostly of the off-set printing variety. There are printing firms with two colour web machines, but these are mostly used in newspaper and magazine printing. There are also letter press printing machines (both lino and monotype) which are mostly used in printing government documents. Most of the printing machines available in Kenya are of an older generation than those found in developed nations like the UK. If the economics and requirements of the textbook producers are carefully negotiated, printing of textbooks can be done locally at low cost and at reasonable high quality.

The existence of commercial printers in Kenya has ensured that publishers do not have to use printing firms in other countries. The foreign publishing firms like Longman, Heinemann and Oxford University Press (OUP) used to print their textbooks in Asian countries like Singapore and Hong Kong. This arrangement has since ceased with the availability of improved paper supplies and quality printers in Kenya. The leading commercial printers in Kenya are based in Nairobi. These printers include English Press, Printpak, Kenya Litho, General Printers, Pizone Printers, Government Press and other small printers.

These printing firms have the capacity for printing and binding educational books in various forms. Machines, both automated and semi-automated, which can do saddle stitching, sewing and perfect binding are present. In most cases primary and secondary books are saddle stitched and sewn in their finished forms.

Paper Production

Kenya has one major paper manufacturer and a number of other small manufacturers. The major paper producer - Panafrican Paper Mills (PPM) in Webuye western Kenya, produces a wide range of paper needed for textbook

printing. Among the paper grades produced are wood-free writing and printing paper, duplicating and off-set paper, bank, newsprint, bond and unbleached kraft paper. Other paper mills produce wrapping, kraft and folding paper mostly from recycled fibre, straw and bagasse. PPM also has the capacity to produce one sided coated boards of up to 224 gsm which are mostly used for cover printing.

Imported paper is mostly the high quality cartridge paper and white glossy paper. Such imported paper attracts some import duty and is slightly more expensive than the locally produced paper. The PPM has its forests where they cut and replant trees for the production of pulp.

Kenya is the second largest paper producer in Africa after South Africa. The PPM was established in the early 1970s, and in its first year of full operation in 1975, paper production was 25,087 tonnes¹⁹. The total paper production level in Kenya has since increased to approximately 176,000 tonnes in 1993. Table 1.2 shows paper production in Kenya and other African countries.

Table 1.2 Paper Production (Africa, Kenya, South Africa, Nigeria, Uganda, Tanzania) in ,000 metric tonnes

	Africa	Kenya	S. Africa	Nigeria	Uganda	Tanzania
1984	2,030	75	1,422	15	n/a	n/a
1985	2,139	75	1,489	41	*2	n/a
1986	2,331	85	*1,611	76	*2	n/a
1987	2,373	89	1,600	#76	#2	29
1988	2,603	100	1,800	95	#2	28
1989	2,756	108	1,899	73	#2	#28
1990	2,734	108	*1,904	79	*3	25
1991	2,694	*93	*1,905	65	*3	#25
1992	2,641	*92	*1,800	62	#3	#25
1993	2,338	#176	*1,500	62	#3	#25

Key: * estimates

FAO estimates

n/a - Not Available

Source: UN Statistical Yearbook Forty-first issue

¹⁹ Kenya. Central Bureau of Statistics (1978) : *Economic Survey 1978* : Nairobi, Ministry of Planning and National Development, 132

The paper produced by PPM accounts for over 50% of locally produced paper. The mill has increased its production since its establishment to over 100,000 tonnes per annum although paper is still imported to the country. Table 1.3 shows the amount and value of paper imported to the country.

Table 1.3 Imported Paper 1981 - 1995

	Value in K£'000		Volume in Tonnes	
	Newsprint	Printing paper	Newsprint	Printing paper
1981	2,181	870	7,802	1,082
1982	885	954	2,610	1,439
1983	-	1,020	-	1,367
1984	390	1,200	1,081	1,321
1985	1,014	1,688	2,553	2,212
1986	1,664	3,055	4,186	4,518
1987	624	1,368	1,589	1,410
1988	4,379	1,918	7,124	1,514
1989	7,466	1,646	7,738	865
1990	6,000	1,492	8,553	1,371
1991	1,952	3,343	3,724	2,960
1992	4,079	4,485	4,551	426
1993	3,130	3,950	1,620	2,125
1994	12,437	6,403	9,716	3,159
1995	12,018	19,182	11,295	6,353

Source: Statistical Abstract 1990, 69 & 66; Statistical Abstract 1996, 95 & 91

The importation of paper (table 1.3) declined when the production capacity of PPM increased. The other factor affecting the decline in imported paper is the customs duty levied on imported paper. The Kenya government levies 16 per cent VAT and 2.75 per cent import declaration fee on imported paper. However, the 16 per cent VAT is also levied on locally produced paper. The increase in the school-going population has created a huge demand for paper for the production of exercise books and for printing textbooks. The production of high quality magazines for

growing niche markets created a demand for glossy white paper which is still imported.

Paper Distribution

Paper distribution in Kenya has to go through manufacturer's agents or distributors before it arrives in the publisher's or printers' premises. PPM sells to its registered appointed agents in reels. The agents will then sheet the paper and package it in reams and sell to printers and publishers. Most publishers in Kenya do not own their printing firms and therefore do not purchase any paper. However, the two state-owned publishing houses have their printing machines, and therefore, purchase paper from PPM. They are registered as agents of PPM and they do not have to go through paper dealers that other printing firms have to go through. Therefore, the two publishing houses benefit from the discounts offered by PPM to its agents which gives them a financial advantage.

The majority of the paper agencies are owned by a small group of entrepreneurs as are the majority of the printing firms. This group also happen to have a majority of the shares in PPM. It is difficult for newcomers to register as agencies for the paper manufacturer. Those registered paper agencies also deal with imported paper. These paper merchants can regulate the paper prices to their advantage whether the material is imported or locally manufactured. Since they control the paper industry by the virtue of domination, paper prices do not truly reflect market forces. Imported paper could be cheaper than that which is locally produced, but these paper merchants mark-up its price to the level of the local paper leaving publishers with no choice.

The terms and conditions of paper selling are not conducive to small firms buying direct from PPM. The minimum quantity is 25 metric tonnes per quality purchase and amount in one delivery to one buyer. The terms of payment are stringent and this depends on the agencies; in most cases, it is cash on delivery. However, some well-established agencies with strong backgrounds are given a 30 day credit period.

1.5.2 Distribution Industry

When addressing distribution of educational books there are a number of factors to review. The various components which make distribution a success include transport infrastructure, communication equipment, booksellers and libraries. Distribution outlets have to be as accessible as possible to consumers in order to give every book its reader. These have to be within reach of all the consumers of the textbooks so that they can be accessed within the shortest time possible in order to make good use of the books.

Warehousing and storage is important in the book industry. Some of the publishing firms in Kenya have established their warehouses or appointed agents who warehouse their stock. The importance of the warehouses in this style of distribution allows large quantities of books to be printed in order to gain the benefits of economies of scale. Such printed stock is stored at the time and sold over a period of time. The publishing houses with warehouses are JKF, KLB, OUP, EAEP, Macmillan and Longhorn Publishers.

In Kenya the transport system is well developed with most major towns being accessible. Although the major towns are accessible by road, there are areas in the northern frontiers of the country with limited accessibility (appendix 2). Most of this area is semi-arid and infested with bandits and cattle rustlers. The security problem is worsened in areas that border Somalia, Sudan and Ethiopia where there are internal security problems. Such problems at times spill over to the Kenyan side.

The book distribution industry in Kenya is rather underdeveloped by European standards but is showing signs of improvement. There are more than 600 bookshops small and large in Kenya, although as with many countries in Africa (and elsewhere) the larger bookshops are concentrated in the major urban areas. Nairobi has the largest number of book outlets, and the largest bookshop in the country, the Textbook Centre, which controls approximately 20 percent of the total book market.²⁰ This imbalance makes it difficult for the rural population, who are

²⁰ Arboleda, A. O. (1993) : Distribution: The Neglected Link in the Publishing Chain. In P. Altbach (ed.) : *Readings on Publishing in Africa and the Third World* : New York, Bellagio Publishing Network, 180

the majority, to get books easily. There are approximately a dozen book distributors in the country spread in most of the eight provinces of the country. The only province without a book distributor is the North Eastern.

The bookshops in Kenya are not comparable to bookshops in the UK or other developed nations. Bookshops are small and stock a few hundred copies of books, mostly textbooks. The bookshops also sell other merchandise in their shops. There are also street booksellers who sell mostly second-hand books. These are the so-called *jua-kali* entrepreneurs - the informal sector.

Schools, parents and regional education offices make their purchases from these bookshops. In areas where there is a scarcity of bookshops, books are bought from the nearest book distributors. During the time when KSES was functioning, the government used to tender directly from publishers. The government had the vehicles to transport the books to district levels where they were delivered to the various schools. It was an arrangement that suited the textbook users and the government at the time but was not in any way helpful to the development and spread of book distribution outlets.

Libraries

The Kenya National Library Service (KNLS) is the nation-wide public library. It has over twenty branches all over Kenya. The public get access to books in these libraries. Where there is no branch nearby, the library operates mobile libraries to schools. The Nairobi City Council also operates a public library service. There are very few schools in Kenya who have libraries. The KNLS has been trying to establish libraries in schools and community based libraries. This helps in distribution of books in the country.

Transportation

There are a number of transport companies that transport books from Nairobi to various parts of the country. Publishers also use the postal services in sending books to their customers. Publishers use their own transport vans to deliver books to bookshops within Nairobi and the surrounding environment free of charge. Transportation is done by road or rail. Apart from using goods transporters,

publishers also use passenger vehicles (*matatus* and buses) in transporting books. By using all sorts of transport modes available, books reach even the most remote parts of the country. The infrastructure itself will be addressed in chapter two, focusing on its reliability and the extent to which it has been developed. An efficient communications infrastructure is vital in book promotion and distribution, as well as building links between rural and urban consumers. The links built in the booktrade industry between the two areas is very helpful especially in the education of the pastoral communities in Kenya.

We have seen in this chapter how the various types of publishing houses came to be established in Kenya; the following chapter will discuss further issues relating to economic activities in the publishing industry. We have also discussed in brief the various industries that go hand in hand with the development of publishing industry; the paper industry and the distribution sector. The financing of such industries are important and this will be discussed in the next chapter.

CHAPTER TWO

SECTORAL DEVELOPMENT MODELS AND PUBLISHING INDUSTRY PRACTICES

2.1 Introduction

In this chapter, the micro-economic environment of educational publishing, in particular will be addressed. Macro-economic factors such as government expenditure on education, inflation, exchange rates of the Kenyan currency against other major foreign currencies will be discussed. As Bgoya (1997) said, the publishing industry, like any other industrial sector, either benefits or suffers from macro-economic factors such as inflation, the state of government budgets, or the strength of the exchange rate.¹ It is from this macro-economic perspective that we will be able to understand the educational publishing in Kenya.

There are internal and external factors that may affect the development of the publishing industry. The most immediate external factors that affect the publishing industry are authors and readers. Apart from readers and authors, other publishers form part of the external environment. As Bailey (1970) said: 'the activities and decisions of a publishing house are profoundly influenced by the constellation of authors that it sees as sources and by the competition it experiences from other publishers.'² Other external factors affecting the publishing industry include the education system and government policy interventions. The education system involves curriculum development, examination systems, and teacher competencies among others. The distribution channels available for textbooks also affect the development of the publishing industry, and it is important to stress that the way the book industry chain operates in a government controlled industry is different from that in a market liberalised environment.

For publishers to execute their function in a well co-ordinated manner, they usually structure themselves into departments. In the majority of publishing houses, the

¹ Bgoya, W., Billany, N. et al (1997) : *The Economics of Publishing Educational Materials in Africa* : London, ADEA, 8.

² Bailey, H. S. (1970) : *The Art and Science of Book Publishing* : London, Harper & Row, 12.

usual departments are: Editorial, Production, Marketing, Accounting and Management. The names used in the many publishing houses may be different but they all end up performing the same functions. These departments have to be managed by well-qualified staff which is one of the internal environmental factors affecting publishers. The functions of the staff affect the operations of the publishing house hence the need of people who understand the internal and external factors well. As Bailey (1970) said, the accounting department keeps detailed records of income and expense, providing management with background information and future projections on the basis of which management can make decisions.³ If the staff are not well conversant with their work, then wrong decisions will be made, hence affecting the operations of the publishing house.

Among other issues to be discussed in this chapter will include enterprise structures, consumer needs and behaviour, industrial context, market liberalisation, and marketing and distribution in the educational publishing industry in Kenya. These topics are discussed in an attempt to understand the operations of educational publishing in a market liberalised environment after operating in a government controlled environment.

The operations under government controlled enterprise face these underlying macro-economic factors in a different way from a market liberalised environment. When the government was controlling the publication of textbooks, the marketing of these books was limited since they were guaranteed to be sold as the government was both the producer and the purchaser of the books. The books produced by the state-owned publishing houses were given core-textbook recommendation status, while those produced by the private publishers were given supplementary and library recommendation status, except where the state-owned publishing houses did not have a title. In a market liberalised environment all the publishing firms both state-owned and private should be able to compete on more equal terms.

Now, in the liberalised market the industry is bound to face challenges in acquisition of capital, utilisation of infrastructure, technological innovations, and in marketing to the potential and actual customers. Each and every publishing house

³ Bailey, H. (1970) : *The Art and Science of Book Publishing* : London, Harper & Row, 25.

wishing to provide books to the education sector must embrace the new changes in the publishing industry.

2.2 Macro and Micro-economic Environment of Educational Publishing

The development of the publishing industry and educational publishing in particular is affected by a range of macro-economic and micro-economic factors. The macro-economic factors include government expenditures and development policies (plans), strength of the overall economy, the home and export markets for books and associated products, inflation, the strength of the exchange rate and the organisation of the book market structure. While the micro-economic factors are those that affect in particular the publishing industry directly, these include the authors, readers, the management structure, printers and the book distribution chain.

Textbooks are unique in that, they have a direct impact on teaching and learning in schools and they carry therefore some political importance. That is why even in developed nations textbook publishing receives direct (e.g. investment in curriculum) or indirect (e.g. library and school book funds) subsidies. According to Askerud (1997), the publishing initiative rests with the state and is guided by government policies for educational achievement, not by normal economic market forces. In other words, through its educational policies, the government decides how many and what books are needed in schools and how these books are paid for.⁴ The system of textbook subsidies in developed countries works through allocation of funding to schools to enable them buy textbooks. Their governments allocate a certain amount annually for purchases of textbooks or give schools discretionary powers. In most developing countries at an early stage in economic growth, Kenya included, government moved a step further into direct production of textbooks in recognition of the importance played by textbooks.

Like any other products, educational books require that the needs of the consumers and their purchasing power should be considered. The needs of teachers, school

⁴ Askerud, P. (1997) : *A Guide to Sustainable Book Provision* : Paris, UNESCO, 57.

children and whoever are to meet the cost of textbooks and other educational materials are paramount in the publishing industry's decision-making. In circumstances where the majority of the consumers have diminished and/or very low purchasing power, the publishers have to consider their pricing policies. In a situation like Kenya where books had been produced and distributed by the government and which is now moving to a liberalised market, publishers have to consider very carefully what the customers can afford.

Like any other business venture, educational publishing dictates that there should be demand for the products. Those enrolled in schools form the actual and potential customers of the publishers. Apart from the school population, the number of subjects and the number of titles needed for various subjects is another determinant factor in educational publishing. It is a complex situation as stated by Bgoya et al (1997); it is common for several pupils to have to share one book and that the book is reused by three or four age cohorts.⁵ In most cases publishers base their production estimates on the number of new copies needed, the possible number of copies in stock and the replacement needs of old textbooks.

The fact that books are slightly different from other consumable products may require a different way of marketing and distribution. As Askerud (1997) said, the difference between publishing and many other commodities is that the printed materials convey explicit values, ideas, aesthetics, knowledge and information.⁶ The range of titles in publishing representing brands are many and each requires its own unique way and attention in marketing. A single subject offered in school may have a number of titles in the market. Books may not be on the high priority list by many people especially in poor societies when compared with food and shelter. There must be customers ready to spend money on the product and in the first place disposable money incomes are necessary condition. When the customers have the money to spend on the products, the industry will have a chance to grow.

The macro-economics surrounding the publishing industry and booktrade sector are closely linked with the politics of the day. In Kenya, immediately after

⁵ Bgoya, W. et al (1997) : *The Economics of Publishing Educational Materials in Africa* : London, ADEA, 42.

⁶ Askerud, P. (1997) : *A Guide to Sustainable Book Provision* : Paris, UNESCO, 13.

independence in 1963, the government summarised the problems facing the country as illiteracy, poverty and disease. One solution to problems of poverty and illiteracy was to educate the people and increase the literacy level of the population. This led to the expansion of education opportunities through increased public expenditure in education. The provision of textbooks was one of the ways to assist in the achievement of this goal. And since there were no indigenous publishing houses, the government had to establish a publishing house that could provide locally produced books.

Though Kenya has been politically stable since independence in 1963, the changes in leadership and change from one party state to multi-party state has had effects on the development of the publishing industry. According to Chakava (1996), the home market stagnated largely as a result of the uncertainty surrounding Daniel arap Moi's succession to the presidency upon Kenyatta's death in 1978.⁷

The movement of both raw materials and finished products in the publishing industry really depends on the usage of petroleum fuel. The increase of the cost of petroleum products during the Gulf war crisis in 1991 affected publishing activities. The costs incurred by transporters and in the printing and paper industries are passed on to the publishers who then passed them on to the consumers. Since Kenya is a non-oil producing country, a lot of foreign exchange was used in importation of crude oil and processed oil products for general use and this ends up affecting the publishing industry.

The monetary and fiscal policies adopted by the government affects the operations of the publishing industry. The flow of foreign capital (mostly financial aid to the government) has an effect on the industry. When the international donors decided to freeze foreign aid to Kenya in 1991, this affected the operations of not only the publishing sector but the whole spectrum of the economy. There was a reduction in the money to be allocated to the Ministry of Education for book-buying. KLB which is one of the main textbook publishers in Kenya experienced a decrease of approximately 10 per cent in sales turnover in 1991.⁸

⁷ Chakava, H. (1996) : *Publishing in Africa: One Man's Perspective* : Nairobi, EAEP, 12.

⁸ Kenya. Central Bureau of Statistics (1991) : *Ministry of Education Annual Report 1991* : Nairobi, Ministry of Education, 49.

Ideally, a government should be seen to encourage the development of the industry through its financial and educational policies. These policies should be favourable and attractive to new entrepreneurs in educational publishing. Such a policy is to encourage healthy competition which can lead to the improved quality of educational books in the market by getting the best authors and illustrators available. The government should make sure that the tariff barriers, tax structures and import duties on paper and machines necessary in the publishing industry are abolished or reduced to low levels. Currently in Kenya, computers, printing machines and cameras attract import duties and with the limited resource available, most would-be investors in the publishing industry will be put off by the capital needed.

A clear and functional national book development policy is desirable in the development of the publishing industry. According to Askerud (1997) it is very important to have an agency which can provide an account of the various laws, rules and regulations which apply to publishing, printing, distribution and the use of books.⁹ Such a body apart from the various bodies representing writers, publishers and booksellers will be able to address issues that affect the industry in general.

There have been attempts in Kenya to establish a National Book Development Council with no success. As stated by Makotsi & Nyariki (1995) there have been a number of meetings amongst the stakeholders in the book industry in 1972 and 1988 but they did not manage to draft a constitution and set up a secretariat.¹⁰ The various policies that have been implemented in educational publishing industry over the years have not been of great help in the development of the industry.

2.3 Enterprise Structures

Kenya's business sector could be classified as operating under a mixed economy, in the sense that the public owned enterprises are operating alongside private business. The government has ventured into business in almost all sectors of the economy.

⁹ Askerud, P. (1997) : *A Guide to Sustainable Book Provision* : Paris, UNESCO, 78.

¹⁰ Makotsi, R. & Nyariki, L. (1995) : *The Book Market in Kenya: Survey Findings on Book Marketing and Distribution in Kenya* : Nairobi, (report prepared for Dag Hammarskjold Foundation), 66.

This started immediately after independence when the government wanted to Africanise the economy. The government ventured into business operations by setting up commercial companies (parastatals). Apart from the government companies competing with those owned by the private sector, there were some products produced and marketed exclusively by the government firms. Some companies could be said to have been operating under command/planned economy but have in the 1990s moved to a market economy structure in a market liberalised sector.

A command/planned economy is a situation where the available resources are identified and assessed and the list of wants and needs are compiled. The government takes control of how the goods are to be produced and how they are to be distributed. In the publishing industry, the government would have to identify the needs of schools and perform all the publishing process. In a utopian world it can work perfectly if all other things are constant.

Such command structures work best in production of some commodities like fuel. It works well if the commodity needs to be rationed and that is when then the government might step in to control its production. This system is also applicable when the price of the commodity in question is to be regulated. Though the government controlled the distribution of textbooks from 1972, through KSES, the system could not be classified as command economy *per se*. It is important to note that there were other private commercial publishers producing textbooks. The government played both a regulatory role and was a purchaser.

A market economy is characterised by individual customers and businesses making decisions on their needs. In such situations, the consumer will choose what will satisfy his/her needs while the business will go for what will maximise their profits. The government in such market arrangements has no involvement or intervention in the business circles. In textbook publishing circles, it is difficult to get such arrangements unless in the distribution stage. The curriculum and syllabus are regulated by governments. The decision on the needs of buyers is entirely left to those who use the books: they will make their own selections and purchase textbooks directly from publishers or through booksellers.

The mixed economy is a combination of both planned and market aspects. It is assumed that the planned economy represents the activities of the government while the market represents the private sector. These systems work hand in hand and are a replica of what is happening in the business world. This may apply in the educational publishing. While the government is controlling the curriculum the private sector is dealing with the production and distribution of the products (textbooks). The decision on books to be used will be made by the users and the government may make recommendations on books to be used or purchase the books centrally.

2.4 Consumer Needs and Behaviour

Consumers take many forms and their needs and behaviours are influenced by many factors that include their age, sex, income, occupation and culture. The products purchased by consumers should always satisfy their needs and desires.

In Maslow's theory, needs are hierarchically categorised and it is assumed that they can be fulfilled in ascending order. In his theory, needs are categorised as physiological (e.g. water and food), safety (e.g. shelter), belongingness, ego needs (e.g. status) and self-actualisation in that order from the bottom of the hierarchy. It is assumed that a person cannot fulfil the next on the hierarchy unless satisfied with the preceding one.

Formal and informal education is considered by many (if not all) societies as future survival and regarded as an investment. The argument being that educating your children will lead to a better life in future. So this will lead to parents investing in the future of their children. The deficiency is in having sufficient means above the subsistence level, at which most people in developing countries, Kenya included, are living under. The opportunity costs (the value of that which must be given up in order to achieve something) are very relevant in such situations; the parents will have to weigh between the basic necessities and education.

In the marketplace consumers expect producers to meet their needs by producing relevant products to suit their needs. Accordingly, the textbook industry is expected by teachers and students and/or pupils to fulfil their needs by getting textbooks

relevant to their syllabuses into the market. The publishers should produce textbooks that will meet their needs in terms of syllabus coverage as stipulated in the school curriculum. The prices of these books should also match what consumers can afford to purchase.

The needs of school-going children are varied and parents have to plan for them carefully. Parents have to weigh-up different requirements (such as school fees, uniforms, textbooks, exercise books and pens) and prioritise these. Apart from providing basic necessities of life for the child, those items to support education have to be provided. In most cases textbooks can be shared between children or can be passed on to the next years' class. This therefore diminishes their prioritisation as things to be purchased.

In this context it is assumed that resources of the individuals are allocated according to the urgency and priority of needs. In the case of education or purchase of textbooks, if the hierarchy is to be followed then parents will only spend on textbooks after meeting the basic needs. This may be true depending on the circumstance and how books are viewed in the community or by the individual.

In a situation where there are many products that can satisfy the needs of the consumer, the producer has to market its products in a competitive market. They have to convince the consumer that the alternative they offer provides the best of the choices available in the market place. In textbook production, publishers have to employ various methods of convincing teachers, students and parents that their books meet the syllabus requirements in full. And this can only apply in a liberalised market environment.

The use of books is encouraged in the hope that students will excel in their examinations. Most textbook users in Kenya use them with the aim of passing a particular examination. This has been demonstrated by the emergence of many revision textbooks in the market place published by educational publishing houses. The series of revision textbooks are marketed aggressively by the publishers. Consumers place a premium on products and services that signify success because

these consumption items provide feedback about the realisation of their goals.¹¹ When these revision books are used by students and/or pupils, their performance in examinations may improve and by that, their goal will have been achieved. They will always consider choosing the revision title series and recommend to their friends if they think it is better than others available in the market.

The presentation of the product will also change the attitudes and behaviour of the consumer. The way the book is packaged; the use of colour on the covers and the quality of paper will influence the perception of the user. Books with more colour and a lot of illustrations will attract more buyers particularly in mathematics and arts. The finishing of the book will have an impact as well; quality finish in terms of binding and paper quality determines the shelve-life of the book.

When consumers make decisions to purchase a product, they consider the quality and value of it. Consumers use a number of cues to infer quality including brand name, price and even experiences of previous use or of other friends.¹² Publishers brand their titles using series or imprints. Publishers in Kenya have developed revision series textbooks for easy identifications by consumers. These series include Gold Medal, Top Mark and Gateway revision textbook series. These titles could be chosen by the consumers according to the prices, recommendations by education officials or by friends who have used them before. Their perception of these titles will have been changed due the opinions of other people.

2.4.1 Opinion Leaders

In the textbook industry, the opinion of those in authority in education on purchases of textbooks is very important. The Ministry of Education Human Resource and Development has an inspectorate department that is responsible for advising teachers on curriculum issues. The Ministry's staff at the district, divisional and zonal levels advise teachers on the books to purchase. They make recommendations to schools on books that cover the syllabus. These are the people the publishers cannot afford to ignore during their marketing process.

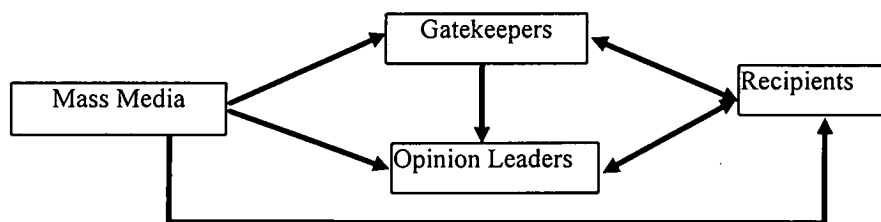
¹¹ Solomon, M. R. (1996) :*Consumer Behavior: Buying, Having and Being*. 3rd. : Englewood Cliffs, Prentice-Hall, 131

¹² Ibid., 324

The education officials could be referred to in this case as the reference group or opinion leaders. They can influence consumers in three ways; informational, utilitarian and value-expressive.¹³ Such influentials have the power to sway the customers' behaviour and consumption.

The education officials communicate with the users in various ways. The Ministry will always send memoranda and list of recommended textbooks to schools. Teachers also visit the zonal education officers in Teachers Advisory Centres (TAC) to seek advice. These officers act as gatekeepers between the publishers and users of textbooks. This can be demonstrated through *figure 2.1*.

Figure 2.1: *Perspective on the Communication Process*



Adopted from Solomon, M.: *Consumer Behavior: Buying, Having and Being* : Englewood Cliffs, Prentice-Hall, 1996

Publishers mostly target these opinion leaders groups to maximise the sale of their books. The publishers' sales representatives will always make visits to education offices to see those who make decisions. The government curriculum developers also are consulted by publishers by sending copies of their books to them for vetting. These curriculum developers will be the ones who endorse and include the titles in the recommended lists. The MOEHRD in Kenya publishes annually a list of recommended textbooks in what has come to be known as the *green book*. The books listed in the *green book* have been through the vetting process in the curriculum centre.

When planning the production of goods, the producers always have to assess the needs of their potential and actual consumers. The needs of the consumers and what

¹³ Solomon, M. R. (1996) : *Consumer Behavior: Buying, Having and Being*. 3rd. : Englewood Cliffs, Prentice-Hall, 340

they can afford to pay are taken into consideration. In a textbook publishing environment, the needs are based on the set curriculum and syllabus prevailing at the time. Publishers have to get a copy of syllabus guidelines from MOEHRD in order to use them when writing textbook titles. Apart from using syllabus guidelines, it is important that they consult teachers and pupils as users of the books.

In relation to the hierarchical plan of needs, textbooks in schools or education may not have a definite position. Some may argue that it falls in the ego needs which is fourth on the hierarchy. Others might put it in on the second hierarchy - safety, depending on their social backgrounds. It all depends on the culture of the community and how they perceive education.

2.5 The Industrial Context

The industry depends on various factors for its development in order to fulfil the needs of its customers. The various facets which make up the smooth development and delivery of the goods include capital investments, the infrastructure and technological advancement and innovations. The availability of the above named factors affect the industry in different ways in a state controlled and a liberalised market structure. We will therefore discuss these factors in respect to the past prevailing conditions, what the conditions are now and what they are likely to be in the future.

2.5.1 Capital Investments

Capital is definitely used in a wider context by economists, but in this study we are using the term capital as liquid money (a resource to acquire assets). We shall be referring to it in the context of the availability of cash for the development of and investment in the publishing industry. The role played by venture capital investments in any industry is great. In a publishing environment, especially educational publishing, the starting capital needed is substantial. At present, the estimated amount required to start a publishing house in Kenya is about US \$300,000 (Kshs 22.5 million). The publishing of textbooks takes a long time for the investor to realise a break-even. Textbooks take a long time from commissioning to

the actual publication date, for which publishers will have spent considerable amount of money without any immediate returns. This has been a strong element in publishing industry investment.

The majority of Kenyan banks and other financial institutions regard publishing as a risky and uncertain business venture. Therefore, they are always unwilling to extend loan facilities to publishers. Furthermore, banks can not accept books as collaterals for securing loans. According to Chakava, banks view publishers like any other manufacturers and/or business ventures and therefore their goods can not be readily turned into cash like cement or iron sheets.¹⁴ In such circumstances, it is difficult to establish and even improve the existing publishing firms.

The amount needed for starting a new textbook project is huge; Chakava (1984) said that a minimum capital of US \$250,000 is needed for an entrepreneur wishing to set up a publishing house.¹⁵ It is worth noting that apart from the development of the title the amount will cover the usual overhead expenses; but about one-tenth of that amount is taken up by the development of the book. The majority of publishers in Kenya find it difficult to cope in such a situation. The only publishing firms which have survived for long and published effectively are the foreign owned and the state-owned publishing houses. Publishers who run into bankruptcy in Kenya are not uncommon, for example EAPH, which was a joint venture between the government and the private sector, was liquidated in 1988 due to financial difficulties. When the government ceased to allocate more money, this firm's financial problems started, thus leading eventually to its liquidation.

Due to the difficulties in acquiring loans, publishers in Kenya have only once been fortunate in obtaining money from outside. The Dag Hammarskjold Foundation gave money through one of the banks to be given to publishers as loans. The interest rates charged by Kenyan banks are exorbitantly high. According to the Central Bank of Kenya report (1997), the average interest rates on overdraft from main commercial banks were 28.9% by December 1996 which had dropped to

¹⁴ Chakava, H., Managing Director, EAEP, (1998) : Interview on 8/7/1998.

¹⁵ Chakava, H. (1984) : An Autonomous African Publishing House: A Model. *Development Dialogue* 1984, 1-2, 124.

28.5% in June 1997 at the close of the financial year.¹⁶ The interest rates further increased in the 1997/98 financial year: commercial banks increased interest charged on overdrafts from 28.5% in June 1997 to 29.6% in June 1998 with the monthly overdraft interest rate averaging 29.6% in the year.¹⁷ This has put off most publishers from borrowing even when they could have used other items to act as securities owing to the nature of business.

The capital needed is not only for publishing or printing books but also acquiring the necessary machines. They need money for performing all the publishing processes from commissioning to promoting books. With the scarcity of money in the publishing industry, publishers resort to using lower quality paper in printing which leads to a compromise on the quality of books. Some publishers have been using newsprint paper and poor quality binding because they do not have the money to use in producing quality textbooks.

2.5.2 Infrastructural Equipment

The availability of good infrastructural equipment aids in the process of transportation of raw materials needed in the publishing industry and distribution of textbooks. Good road infrastructure enables the transportation of goods in a shorter time which might lead to lower costs. The postal and telecommunication infrastructure are also important for the communication between the producers, suppliers and the consumers.

Road and Railway Network

The road infrastructure in Kenya is one of the best in the East African region. Road networks connect to all the major towns in the country. The majority of the roads are all-weather and books can be transported to any part of the country with limited difficulties.

The railway network is not well developed. There is one main railway line running from Mombasa to Uganda used by both goods and passenger trains. The line is a

¹⁶ Central Bank of Kenya : Monthly Economic Review : Internet address URL : <http://www.centralbank.go.ke/cbk/AnnualReport/5.html> available on 30/4/99.

¹⁷ Central Bank of Kenya : Annual Report 1998 : Internet address URL : <http://www.centralbank.go.ke/cbk/AnnualReport/1998/5.html> available on 30/4/99.

single track and was constructed by the British colonial government in 1900. It has branches to other towns and a line to Tanzania. This line is used in transportation of goods including books and printing paper. Its cheaper transport costs as compared to road make some publishers and paper producers use it.

Postal and Telecommunications

Postal and telecommunication infrastructures are of fundamental importance in the publishing industry. As we have noted the development of such infrastructures help the publishers to keep in touch with their potential and actual customers and facilitate efficient delivery systems (table 2.1).

The postal services are used in sending promotional materials and books. In Kenya, the postal services are well developed and they operate in all parts of the country. All the schools in the country have their postal boxes, except in some schools in some remote corners of the country. In such cases the schools are contacted through the postal boxes of their district or divisional education offices. Publishers can therefore dispatch their promotional materials to such schools with confidence of the items reaching their destinations. The Kenya postal services provide services that include ordinary and quick parcel services (EMS-speed post).

The telecommunication system in Kenya as compared to other developing countries is among the well-developed. Most of the rural population are not connected to the telephone services. The telephone and facsimile services are mostly confined to towns. Such services can make the communications between publishers and the customers very easy. It is not only important for publishers in getting in touch with the customers but also to other service providers like the printers, suppliers of other essential raw materials and the outside world. In Kenya some publishers do export educational books to Tanzania, Uganda and southern Sudan and the use of telecommunication and postal services is very important.

The telecommunications services should reach the widest number of people possible. This will ensure that the publishers can effectively reach as many potential and actual customers as possible and at the shortest time possible. Here below are numbers of main telephone lines in some selected countries. the statistics below only gives the number of lines up to 1994, but there has been further

development in these countries so far. There has been more investment and development especially in the field of mobile telephone lines.

Table 2.1 Main Telephone lines(Kenya, Nigeria, South Africa, Uganda, Tanzania)

	Main Telephone Lines									
	Telephones ('000)					Number per 100 inhabitants				
	1990	1991	1992	1993	1994	1990	1991	1992	1993	1994
Kenya	183	200	207	215	219	0.8	0.8	0.8	0.9	0.9
Nigeria	289	294	321	342	369	0.3	0.3	0.3	0.3	0.3
S. Africa	331	3435	3524	3660	3845	8.7	8.8	8.9	9.0	9.5
Tanzania	73	76	81	85	88	0.3	0.3	0.3	0.3	0.3
Uganda	28	28	30	21	35	0.2	0.2	0.2	0.1	0.2

Source: UN Statistical Yearbook Forty-first issue, 1996

In a country like South Africa, the telecommunication infrastructure is well developed and publishers can easily reach their customers. The quality and the frequency of breakdown of the telephone systems is also important in use of the telephone systems. In Kenya the analogue and the digital systems of telecommunications are used. The subscriber trunk dialling (STD) telephone systems is in use in most parts of the country where telephone lines are operational. Though, there are some areas which can not be accessed through facsimile and others are accessed through the operators. The cost of the installation and use of the telephone services in most African countries including Kenya are very expensive. Such costs affect the publishing and booktrade industry. At times when the telephone systems break down, it takes a long time to be repaired and hence affects the operations of the publishing industry.

The use of internet has significantly gained ground in Africa and more so in Kenya. The AfricaOnline is one of the leading Internet Service Providers (ISP) in Africa and used for communication amongst the players of publishing in Africa. In Kenya some of the ISPs include Net200, AfricaOnline, Telekom Kenya and Form-net. The publishing industry has taken the opportunity to use the internet in their

communications as its cost is substantially lower than those of telephone or fax messages.

2.5.3 Technological Advancement

The changes in technological advancement taking place in the industry and the environment affects the operations of the industry. It brings challenges within the publishing and bookselling industry. The implementations of these new innovations in technologies require enough money.

The introduction of new techniques in book production are some of the things which the publishing houses in Kenya have to cope with. Desktop publishing techniques is commonly used by publishers world-wide. It requires the staff to be trained on the use of computers in design of book pages and illustrations. Though most publishers have embraced the new technological changes, some still used the traditional methods of book production. Some printers in Kenya still use the letter press printing machines.

The acquisition of computers requires that publishers have money for their purchase. The publishers may have money for machines but will require trained staff to operate and maintain them in case of break down. In Kenya there are a number of polytechnics that train personnel on use of new technologies in the information fields. These institutions include Kenya Polytechnic (Nairobi) and Sigalagala Technical Institute (Kakamega). Apart from these, the Faculty of Information Sciences in Moi University offers courses on all areas of information generation, handling and retrieval using new technologies. Publishers and other related industries in the booktrade can therefore get trained staff from these institutions.

The use of bar coding on books is one of the challenges facing publishers and booksellers in Kenya. The bar codes allow the use of Electronic Point of Sale (EPOS) systems. The EPOS systems allows good management of warehouses and sales forecasts and electronic data interchange with publishers' distribution departments and booksellers.

2.6 Market Liberalisation

Market liberalisation is a slogan which has been used very often in the 1990s. A combination of various factors has brought it to the centre of the stage in Kenya. The inefficiencies of some state-owned firms and limited budgetary resources to allocate to them are some of the factors. Another contributing factor has been policies from the Bretton Woods institutions telling the government to privatise and liberalise their markets in order to receive loans and financial aids.

Market liberalisation can be taken to mean relaxation or elimination of tariffs and removal of duties and/or quotas on exports. The relaxation or elimination of exchange rates control, restriction or licensing of imports among other tariffs that affect internal and external markets. We shall consider the effects of foreign exchange controls and import restrictions in the publishing industry under a controlled and liberalised market environment.

In a liberalised market, the demand and supply forces determine the level of production and prices of the goods. This is assumed to work in a situation where there is no government involvement or intervention in the production or the marketing and distribution of the product in question.

In the publishing world, and especially in educational books, it is assumed that books will be produced according to the needs of the teachers and students. There are other gauges which determines what these teachers and students need. The curriculum has to be set by a body so that publishers can use the curriculum guidelines in producing books. The books have to be checked also to make sure that they meet the standards required in the curriculum. The tenets of market liberalisation addresses government involvement in the actual production of books.

In the wave of liberalisation and privatisation, the government's stake in the business sector has diminished considerably. The change was engineered by implementation of World Bank and IMF prescriptive Structural Adjustments Programmes (SAPs). This has caused reduction in government economic productive activities. The structural adjustment programmes have also affected public expenditure and led to introduction of cost-sharing schemes in some sectors

including education and health. The public and the government both meets the cost of provision of education and health care in the country.

Development of the publishing industry depends on the availability of capital and market for their products. Like most developing countries, Kenyan publishers hardly have access to capital for investments. However, in 1988, a loan guarantee programme was established for Kenyan publishers, with funding from the Ford Foundation (US \$300,000) to cover capital, possible losses, bank expenses and an advisory committee's expenses.¹⁸ The maximum guaranteed which a publisher could receive was US \$41,000.¹⁹ The main sticking point though as mentioned earlier is the interest rates on overdrafts which are too high for any meaningful returns to the publishers and the lack of tangible securities to offer to the banks.

2.6.1 Foreign Exchange Controls

The allocation or restriction of foreign exchange has effects on the production of commodities in the market. In countries where a lot of imported products are used in industries, the exchange rate plays a major role in the determination of prices of locally produced goods. Where governments fix the level of exchange rate, there are cases where the currency might be over valued or otherwise.

In the case of the publishing industry, paper prices are normally quoted in major currencies (mostly US\$). The fluctuations of the local currency will always affect the activities and pricing of textbooks. In the wake of financial market liberalisation in Kenya the local currency lost its value against the major trading currencies notably the UK pound sterling and the US dollar.

¹⁸ Bgoya, W. (1997) : The Development and Future of Publishing in Africa: 12 Years after Arusha 1. *Development Dialogue* 1997: 1 - 2, 20.

¹⁹ Rotich, D. C. (1997) : Educational Publishing and its Marketing Aspects in Developing Countries: a Study of Kenya. *The New Review of Information and Library Research*, Vol. 3, 192.

Table 2.2 Exchange Rates (1988 - 1998)

	£/Kshs	US\$/Kshs
1988	30.97	18.09
1989	32.55	21.05
1990	40.21	23.13
1991	46.79	28.66
1992	61.50	32.31
1993	98.50	65.14
1994	87.51	55.00
1995	85.55	53.62
1996	89.42	57.99
1997	89.22	54.24
1998	99.80	60.52

Source: Central Bank of Kenya

Prior to 1991, the government was controlling the exchange rates and they adopted a flexible exchange rate policy. Those who wanted to import goods had to apply through the Central Bank of Kenya for allocation of forex. In 1991, the policy was relaxed and the Kenya shilling was traded (floated) over the counter by commercial banks. The exchange rate against the sterling pound rose by 23 per cent. The shilling had lost over 30 per cent of its value by the end of that year of floatation. By the end of June 1993, the inter-bank exchange rate and the official exchange rates to the sterling pound against the local currency were different; the two methods existed side by side for some time. The inter-bank exchange rate was Kshs 122.08 to the sterling pound and Kshs 81.88 to the US dollar and was mostly used by investors in the industry to avoid the long wait caused by government red-tape.²⁰ Between 1988 and 1998, the shilling had depreciated by over 222 per cent. The decrease was mirrored through increase in prices of imported and locally produced goods whose raw materials are imported.

²⁰ Kenya. Central Bank of Kenya (1993) :*Twenty-Seventh Annual Report for the Financial Year ended 30th June 1993* : Nairobi, Central Bank of Kenya, 6 - 15

This had knock-on-effects on the earnings of the population. Their purchasing power also depreciated. This resulted to a real wage earning decrease of 12 per cent in 1991/92. The underlying factors which caused the decrease were inflation which was triggered by increase in commodity prices. The prices of textbooks were also affected. Other factors were the freezing of foreign aid to Kenya and market liberalisation. When the market was liberalised, there was an increase in imports which created a huge demand for foreign currencies although they were still limited.

The fluctuation of the local currency against the two major currencies affected the operations of publishing firms. The products which have direct implications for the prices of books were affected. Mostly those imported are machine spare parts, computers, petroleum products, glue and paper. These are the core materials for the publishing industry. It is assumed that the depreciation of the shilling was reflected in the cost of production of books and passed on to the consumers since there was a sharp rise in textbook prices in 1991- 1993.

2.6.2 Import Restrictions

Kenya in the 1970s placed increasing reliance on import controls and quantitative restrictions to save foreign exchange and to encourage domestic manufacturing production.²¹ It was reinforced through introduction of bureaucratic procedures to be followed before given clearance to import the good. The importation of textbooks were also subjected to such procedures leading to delays in delivery, but this created opportunities by protecting the market. The delays and procedures needed to be followed before textbooks were delivered could have discouraged some companies leaving them with the option of starting local publishing.

Governments at times have to take drastic action by licensing imports or even by imposing import quotas or complete ban on some imports. Others will encourage and subsidise some industries that produce import substitutes. The government was also involved in direct production and management of industries through parastatals or state -owned industries. The Kenyan government has used such

²¹ Bienen, H. (1990) : The Politics of Trade Liberalization in Africa. In *Economic Development and Cultural Change*, Vol. 38, No. 4, July, 713

methods in the past in order to encourage development of local industries and to save much of the needed foreign exchange.

Kenya imported printed books, brochures, booklets, pamphlets and leaflets worth over Kshs 44m in 1979 and over Kshs 66m in 1980.²² More than half of these imports in value were from UK in both years. Most textbooks were imported from UK since the publishing houses in operation at the time were mostly British publishing firms like Cambridge University Press, Heinemann Educational Publishers, Longman, Macmillan and OUP. Due to the relatively high cost of printing in Kenya as compared to some Asian countries, most textbooks were printed in either Singapore or Hong Kong. Books of this category from Hong Kong formed 14.4% in 1979 and 6.7% in 1980 of the total value of imports.²³

Banning of imported primary and secondary school textbooks gives an upper hand to young upcoming local publishers. It also saves the country concerned scarce foreign exchange which can be used on other essential things. The ban which was put in place in Kenya affected mostly textbooks, reference books; atlases and dictionaries. These books are now mainly published in Kenya by OUP and East Africa Educational Publishers. The ban which took effect in 1989 was perceived as a challenge and opportunity for local publishers to publish books that have relevance to the educational and cultural needs of the users.

2.7 Marketing and Distribution

The growth of the publishing industry depends on the success of its products in the market place. It is important to note that marketing is very essential. The publishers have to understand what kind of market they are entering. They have to know how many titles are available in the market and understand their customers and the characteristics of the market place. From these, it will be possible for them to plan their marketing strategies.

²² Kenya. Central Bureau of Statistics (1981) : *Annual Trade Report: for the year ended 31 December 1980* : Nairobi, Customs and Excise Department, 1981, 346

²³ Ibid., 346

2.7.1 Marketing

The word market may be rather confusing at times. In simple terms it is considered to be a meeting place for making exchanges, where it is accepted that the relative value of different products is established. It is also often used to mean the individuals or organisations who are or could be purchasers of a particular product.²⁴ It is also regarded as an area in which the aggregate of forces or conditions result in decisions that satisfy demand by transfer of goods and services.²⁵

From the above definitions, the market for educational books could be the geographical area or the school going population. In our case, we are talking about the Kenyan market, which is the area and the population of students and/or pupils and teachers. The students and/or pupils may not have the capacity to purchase the books though they are the user/consumers of the product. Their parents and teachers therefore will take their place as the purchaser of educational books.

A product has to be made available to customers when and where those customers need it. The market, that is, the customers should always be satisfied with the service. This brings about the marketing concept. Marketing has been defined by Kotler as, a social and managerial process by which individuals and groups obtain what they want and need through creating, offering and exchanging products of value with others.²⁶ Another version of the definition is offered by the British Chartered Institute of Marketing (CIM); marketing is the management process responsible for identifying, anticipating and satisfying customers requirements profitably.²⁷

Marketing Mix

There are four areas which must be blended correctly to achieve marketing success. They are identified as product, place, promotion and price.

²⁴ Adcock, D et al (1995) : *Marketing: Principles and Practice, 2nd ed.*: London, Pitman Publishing, 4

²⁵ Diamond. J. et al. (1991) : *Principles of Marketing, 4th ed.*: Englewood Cliffs, Prentice-Hall, 4

²⁶ In Adcock, D et al (1995) : *Marketing: Principles and Practice, 2nd ed.*: London, Pitman Publishing, 2

²⁷ Adcock, D et al (1995) : *Marketing: Principles and Practice, 2nd ed.*: London, Pitman Publishing, 3

These factors may not function in a monopolistic market. This is a situation where the producer has a ready market through legislation or otherwise with no competition. In the educational publishing in Kenya, the mix could not work to its full expectation in the years before September 1998, when a new policy on textbook procurement was published.

The **product** in this case are the textbooks. There is need to keep them up to date and to be constantly revised in line with the syllabus. They should contain appropriate examples and illustrations. Their layouts and blend in colour and design should appeal to the customers.

The **place** in marketing is the geographical location and distribution channels used. It is evidenced by the form of how the products will be sold and, what institutions exist to be used. Though it is regarded that books are sold in conventional bookshops, the decision on whether to sell them in supermarkets, *Dukas* (kiosks) and street stalls by hawkers is important. The significance of the place is determined by the suitability and accessibility to the consumers of the product.

Promotion involves communicating with the target market about the product, place and price of the goods. Sales promotion, advertising, exhibitions, school visitation and personal selling are the elements that must be considered in the determination of a promotion policy. The publishers therefore need to reach the target customers. In the case of educational books, the school visits and those who make decisions are very important.

Product must be priced competitively as compared to other similar products. The **price** should be decided upon taking into consideration competitors' actions, existing practices on mark-up and discounts and target profits.

2.7.2 Distribution

Distribution can be defined as the idea of getting goods and services to the people who want them and who can pay for them. In our case the goods and services are books and the reader is willing to pay or other bodies are on their behalf like school, academic or public libraries. The mode of getting these goods to the people is very important in the distribution process. How and when do they come to know

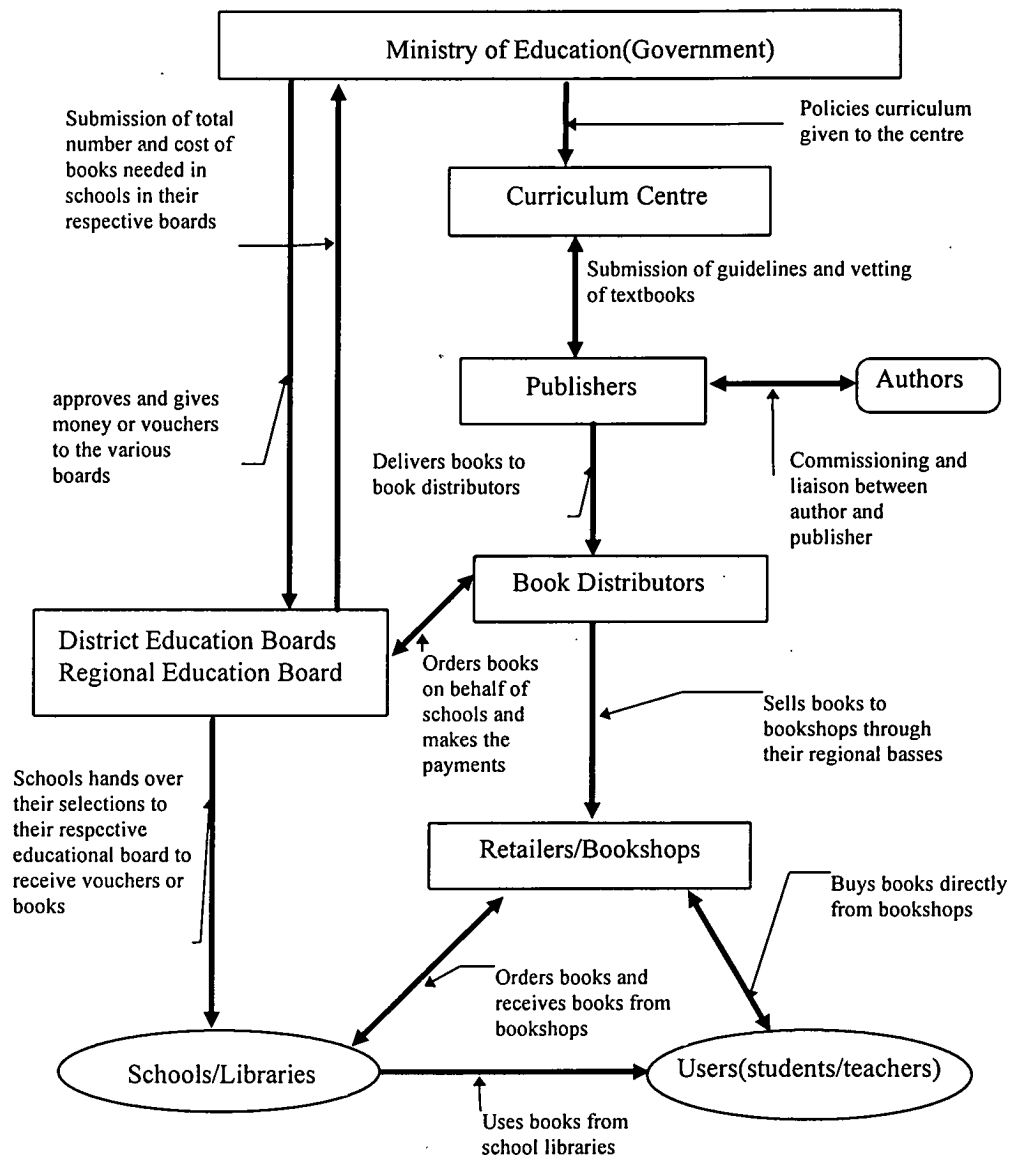
of these goods is equally important. When dealing with books, the socio-cultural aspect should always be considered, for books influence the lifestyles of people.

Distribution of products starts within the producer's premises. Textbook distribution in Kenya is not well developed in comparison to developed nations for example UK or USA. The distribution sector involves activities from planning, inventory, packaging, in-house warehousing, transportation, field warehousing and the retail outlets. Some publishers in Kenya operate their own warehouses both within their publishing premises and/or within Nairobi city and others within other towns. Publishers that have warehouses within Nairobi include EAEP, JKF, KLB, Longhorn, Macmillan and OUP. These publishers stock their book titles and maintain inventories which are controlled within the Marketing and Distribution departments. Publishers like JKF have established their depots in various parts of the country where they sell their books to bookshops and at times to individual customers. EAEP have a subsidiary company that deals with the distribution of its book titles and has also appointed book distributors in various parts of the country.

Textbooks require a unique method of distribution unlike other items like soap, maize or margarine. The nature of their customers and the purpose they serve in the community demands that they be treated differently. In Kenya, the government had been controlling the distribution of educational books. KSES had been established by the government in order to distribute books to schools directly from the publishers therefore bypassing the conventional book chain. Under a market liberalised environment, the government will concentrate on the development of curriculum and vetting of educational books submitted by publishers to the curriculum centre leaving the distribution chain to develop under market conditions.

As mentioned earlier in this chapter, government intervention in the publishing industry can be a help or a hindrance to its development. The government can provide money to schools so as to purchase books or the government can organise to purchase books centrally. If the government purchases books through a centralised body, the booktrade sector (bookshops) will have a little chance of development. The government can also go further than purchasing books and

Figure 2.2: Model of Textbook Distribution



development of curriculum to writing manuscripts and publishing them. This would have serious effects on the overall development of the publishing industry from authorship to development of the publishing industry in general.

Figure 2.2 illustrates a case where the government works in harmony with the publishing industry. The government through its curriculum centre develops the curriculum and syllabuses then hands over to publishers who will commission authors. Publishers will then submit their published titles to be vetted by the curriculum centre. In Kenya, before the new policy which was launched in 1998, the curriculum centre was developing the curriculum and writing books to be published by state-owned publishing houses. The development of the industry is to be judged on the quality and quantity of materials produced on a yearly basis. And

that is why the curriculum centre should be vetting textbooks from publishers so as to ensure that they are of the right quality and standards. If the curriculum centre is involved in textbook writing and is also vetting textbooks, partisanship in the vetting process may occur.

The publishers will sell their books through the conventional book distribution chain. The government may also purchase the books but not directly from the publishers. In Kenya, before market liberalisation of the textbook market, the government used to author books, publish them and purchase the same books from the state-owned publishing houses. In such situations, it is difficult to maintain a high quality production of books and the publishing industry will not develop as fully as it might. It will be difficult for the government to vet the books they have written without some bias.

2.7.3 Bookshops

Bookshops come in various shapes and sizes with varying amount of stock ranging from hundreds of titles to tens of thousands. They can be small individual bookshops or large with a number of branches. Bookshops are very important outlets for books. They are the vital link between the author and the reader. Their number, sizes and availability of bookshops across the country is a guarantee that books will reach all the potential and actual customers (list of bookshops appended in Makotsi et al (1995) report)²⁸.

There are conventional bookshops, but books can also be sold in supermarkets, small grocery shops, hardware shops, stalls in a market place and also on street stalls. In Kenya, it is only in major towns where one can get a conventional bookshop. Most bookshops stock a few hundreds of titles mainly textbooks that sell only in the peak selling period (between November and March). In the remaining part of the year these bookshops sell other merchandise which include stationery, cards, and clothes among others.

The efficiency and effectiveness of bookshops in aiding the development of the publishing industry should be backed-up by trained personnel who run the

²⁸ Makotsi, R. & Nyariki, L. (1995) : *The Book Market in Kenya Today* : Nairobi, Dag Hammarskjöld.

bookshops. Those who manage the bookshops should be able to utilise the new technologies for the benefit of the customer. They should be able also to understand what they are selling and know the needs and the economic status of their customers.

Bookshops on the other hand can not just develop without availability of financial investments. With the help from publishers, they can be supplied with books for a certain period of time on credit. Banks also can play a major part by providing them with the initial capital on preferential terms. This will provide publishers with abundant outlets for books. There are remote areas in Kenya where bookshops are hardly established due to the hardships and economic conditions prevailing. In such areas publishers need to identify potential business people who can be helped to establish bookshops.

2.8 Sectoral Models

The efficiency and effectiveness of other sectors in the economy will help in the development of the publishing industry. As mentioned earlier, everything depends on the availability of financial capital. With a quality banking sector offering quality services and loans with lower manageable interest rates, this will lead to greater investments in the publishing industry and the support industries.

The distribution networks are very important in making sure that books reach their target customers at the right time when needed. This will be determined by the method and the structure of the distribution industry. In a textbook market, the structure of distribution should be as simple as possible. The channel also should cover the entire country with minimum added costs. This could be what the Kenya government wanted to achieve when they established KSES in 1972. Under a liberalised market environment, the red-tape which was involved in the government operated distribution systems should be eliminated.

Figure 2.3 and 2.4 describes two methods in which books can be distributed under a liberalised market environment. Under such conditions the distribution outlets of books will increase but under government controlled environment the would be investors will not invest in book distribution outlets.

Figure 2.3 Book distribution through retailers

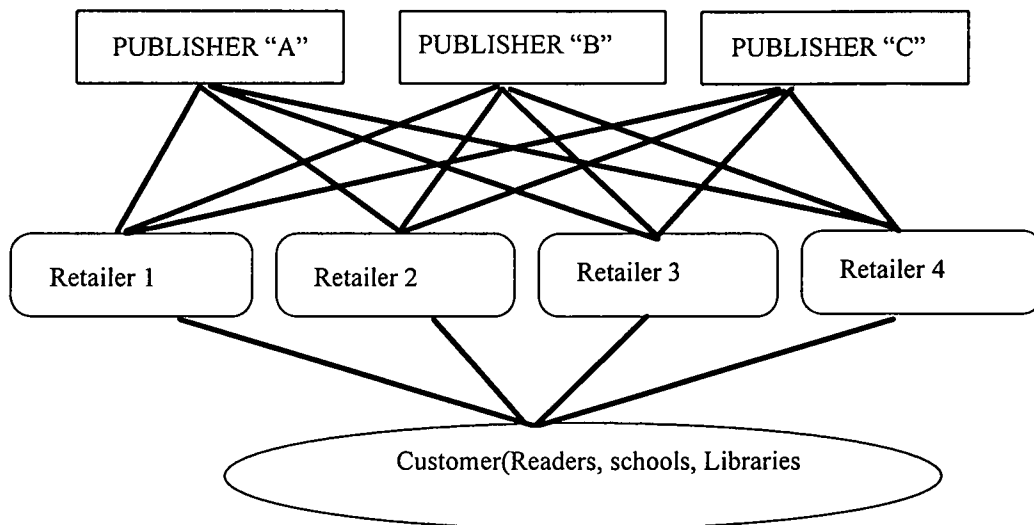
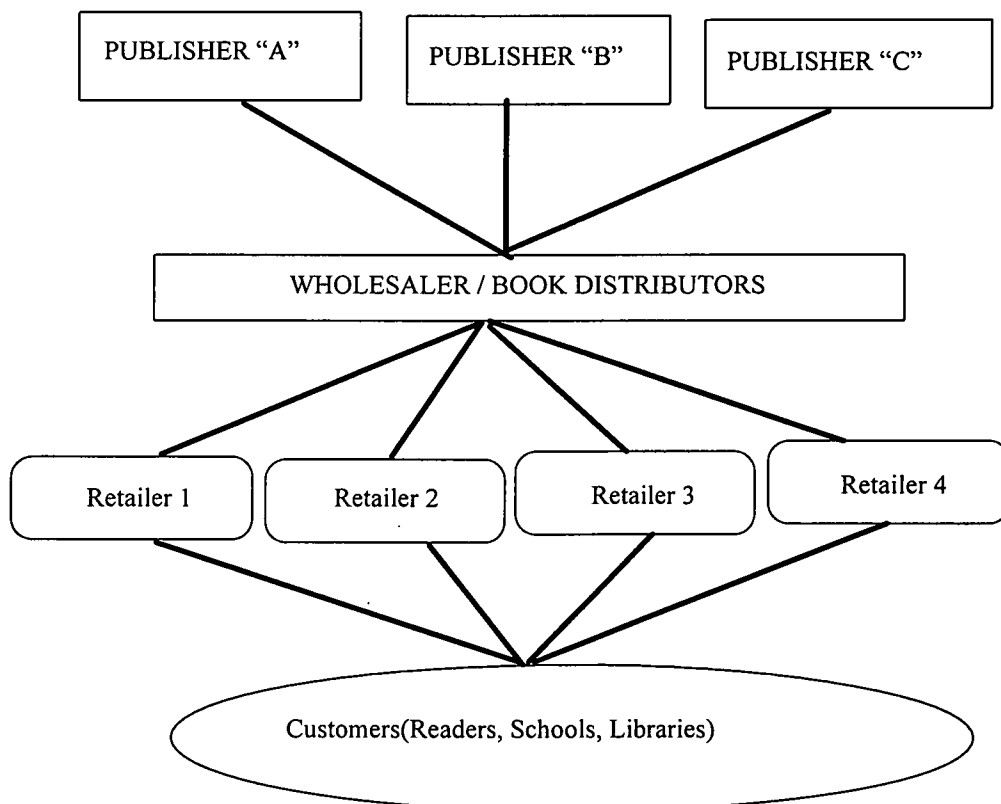


Figure 2.4 Book Distribution through Book Distributors/Wholesalers



The most important thing for publishers is to get their books to the customers in the shortest time possible. The availability of book retailers closer to the customers will enable the publisher to achieve that objective. If the government is involved in the book distribution process, it may have some effect on the textbook industry. The government will be concentrating only on a few titles and taking books directly from the publisher to schools.

At present in Kenya, the above models *figure 2.3* (p. 48) and *2.4* exist side by side. The first model *figure 2.3* where publishers directly sell their books to bookshops which might be small or large is operated by the publishers maintaining accounts for them. This arrangement makes the book retailers receive higher discounts from the publishers than what they could receive from book distributors. However, in some cases, the Kenya publishing houses offer lower trade discounts to book retailers since the quantity of the purchases are always lower. This arrangement also requires publishers to maintain large volumes of records and deal with more customers which might require more personnel in the sales and marketing departments.

There are a number of book distributors in Kenya who purchase books from publishers and sell them to bookshops and sometimes to schools and libraries. These book distributors stock book titles from all the publishing houses in Kenya and always present a one stop shop for bookshops. Although bookshops receive lower trade discounts from them, it saves them money and time when they obtain their others from them. The book distributors are conveniently present in all the provinces of Kenya unlike the publishing houses whose distribution departments are located in Nairobi.

2.9 Development Process

The development of the publishing industry in Kenya, particularly educational publishing which is the backbone of the entire publishing industry has gone through various developmental stages. The size of its market has increased tremendously if we go by the school enrolled population from independence in 1963 to 1995. Though the market size has increased we must not forget that the

purchasing power of the market matters most; this has declined and its weakness is a primary restriction on the expansion of the industry. The market environment also is another factor which determines the development progress.

The development of any sector is surely measured by its productivity. We can say that the publishing industry in Kenya has grown from a market for foreign published books to the establishment of indigenous publishing houses. Educational publishing has always been the leading sector in the publishing industry in Kenya.

The availability of a ready market for textbooks has been the leading factor in the development process in the publishing industry in Kenya. However, the distribution sector has not developed in the private sector. The distribution of textbooks in Kenya had been in the government domain for some 12 years from 1972 to 1984 when the KSES was in operation. It is important to stress that the distribution of textbooks and other general books is an important element in the growth of the industry. Stages of development in the industry are considered in more detail in chapter 10.

This study is mostly concerned in the development of the educational publishing and the implication of the market liberalisation. The consumers are important in this study and how they acquire the books, the following chapter defines the aims and limits of the study.

CHAPTER THREE

DEFINITION OF THE STUDY AND RESEARCH METHODOLOGY

3.1 Introduction

When the majority of African countries gained their independence, Kenya included, educational books were brought from their former colonial countries. Local indigenous publishing houses were almost non-existent. The publishing houses that were operating in these countries were branches of publishing companies based in Europe or North America. These were mostly marketing and selling educational books. Another task which those branches of publishing houses had was, to scout authors who could write quality manuscript that would be forwarded to their parent companies for publication and import them back into the country of origin and other African countries. Soon after independence in most African countries, their main priorities were education of their citizens and eradication of poverty and diseases. The education element was very important to enable the young nations to manage their economies by replacing the expatriates who were moving back to their countries of origin. They had to provide learning materials to schools without relying so much on the books which were being imported by the foreign publishing houses. Textbooks imported and sold by the foreign publishing houses were seen by the local politicians as inappropriate to their cultural needs and therefore there was a need to find more suitable books. For the problem to be solved, most of the African governments entered into publishing by either establishing publishing houses or a department under the Ministry of Education charged with the function of printing textbooks. Some multinational publishing houses also entered into joint ventures with some governments to start state-owned publishing houses.

Most African countries, after independence adopted Unesco's concept of Universal Primary Education. The concept was to make elementary education free of charge to all children regardless of their social and economic backgrounds. Under the

universal system, the government met the cost of education in primary schools by providing school equipment, buildings and paying teachers' salaries. The system was discontinued after sometime in some countries due to economic constraints. The construction of school buildings in Kenya is financed jointly by the government and the local community through fund raising. In some cases the local communities could fully meet the cost of school building construction and the government will always provide teachers to all schools in the country. It is common for parents to buy books for their children, although at times fund-raising is organised by various District Education Boards for purchase of books which are then distributed to schools.

The publishing industry in Kenya is one dominated by educational publishing. Like any other developing country textbook publishing in Kenya is the bread and butter of the publishing industry. There is a sizeable number of publishing firms in Kenya including those publishing magazines and newspapers, and newsletters (see appendix 3).

Those who publish educational materials can be categorised according to their ownership; state-owned, religious/missionary, foreign and indigenous private commercial publishers. The state-owned are Jomo Kenyatta Foundation (JKF) and Kenya Literature Bureau (KLB). The religious/missionary owned publishers are Evangel Publishing House, Uzima Press, AIC Kijabe Printing Press, Kesho Publications among others. The indigenous private owned commercial publishers include Longhorn Kenya Ltd, EAEP, Gideon Were among others and the foreign owned include Oxford University Press and Macmillan Kenya (Publishers) Ltd.

The distribution of educational books in Kenya is done through the bookshops and at times directly to the schools or district education offices. Some international non-government organisations like Swedish International Development Agency (SIDA), the UK's Department for International Development (formerly Overseas Development Agency - ODA), Arid and Semi-Arid Lands (ASAL) and World Bank have assisted in financing the purchase of textbooks. When these organisations come in, they mostly finance the printing of books from the state owned publishing houses and deliver them directly to the district education offices

for distribution to the schools. The Kenya School Equipment Scheme (KSES) used to distribute books but no longer does due to the shrinking budget allocation by the government. The function was stopped in 1984 when the government stopped buying and supplying most of the textbooks; this was followed by the introduction of a cost-sharing scheme. In the scheme the parents contribute towards the education of their children by buying textbooks or contributing towards their purchase by the schools.

The educational publishing industry in Kenya has been through various stages. A number of British publishers were dominant before and after independence in the supply of educational books. In the early 1950's the first British publishers established offices in Kenya. Soon after independence in 1965 the government started a publishing house and a number of private indigenous publishing houses followed aiming to publish educational books.

Publishing is an important tool in the enhancement and development of education in any country and more so for the developing countries. It is closely linked to culture and to education and these are deeply rooted in national goals.¹ Any publishing house whether indigenous, state owned or a branch of a multinational providing educational and other reading materials has great influence on the destiny of education in the country it operates within. Books have the power to mould the character of a person likewise to the culture of a nation. Arboleda (1993) notes that textbooks occupy a place of primacy in a nations cultural development because they serve educational needs.² Through education, the cultural values and knowledge of a nation is passed down from one generation to the other. The development progress of any nation can not be separated from the education of her people. The development always depends on the educational capacity of that particular nation; one of the factors that makes this work is the provision of books by the publishers.

¹ Altbach, P. (1992) : *Publishing and Development in the Third World* : London, Hans Zell, 2.

² Arboleda, A. O. (1993) : Distribution : The Neglected Link in the Publishing Chain. In P. Altbach (ed.) : *Readings on Publishing in Africa and the Third World* : New York, Bellagio Publishing Network, 182.

3.1.1 Problem Statement

The publishing industry in Kenya has been through various stages since the establishment of distribution branches by British publishers in 1950's. The multinationals, mostly British publishers, came in and set-up branches for selling their books. After independence, the government ventured into publishing by establishing publishing firms. These firms were to publish books authored at the curriculum centre.

There are various aspects which determine the market for and distribution of educational books in any country. The economic factors, the size of the market, and the policies of government and the producers. Distribution is not just a physical phenomenon but determined by various factors, both economic and social.

The study will focus on how the players in the market have reacted to progressive market liberalisation. What techniques will any state-owned publishing house use to compete with the private publishing firms in the future? How did the industry respond to the distribution of educational books after the government's withdrawal from the purchasing of books?

3.1.2 Research Questions

Given the previously outlined statement of problem it is clear that a number of issues require investigation. The broad aim of the research is to analyse the market environment of the educational publishing industry in Kenya under market liberalisation. The analysis of this will be in relation to the goal of developing a well-structured industry for the future, as the industry faces liberalisation leading to a competitive market between any state-owned enterprise and the private enterprise. There are a number of shortfalls within the industry that need to be studied. These problems are centred on the marketing and the distribution of books, and more so for educational books. The study will look at the ways and means of strengthening the publishers and creating more opportunities for taking advantage of the market environment.

The following more detailed objectives can be identified and form the basis of research questions for the study;

- a) To investigate the growth of the market of educational books
- b) To examine market opportunities for the publishing industry
- c) To investigate the trend of educational publishing in Kenya

- d) To gain an understanding of the market aspects and factors that affect the distribution of educational books
- e) To examine the procedures used in adoption of school textbooks in both primary and secondary schools.
- f) To examine the effects of pricing of textbooks in various market categories
- g) To investigate the customer views on school textbooks authored by Kenya Institute of Education
- h) To relate publishing in Kenya with other countries in Africa
- i) To investigate the flow of information on educational books from the publishers to the market place.
- j) To make recommendations on how to enhance and strengthen the distribution of educational books

3.1.3 Research Justification

As stated in the problem statement, this study is unique in its own right. This study attempts to explore the factors that affect development of educational publishing under market liberalisation, a field which has not been studied before. This will not just end in this particular study but as contribution to knowledge, it will be available for use by future researchers. Other factors that led to the choice of this research topic are as stated below;

- a) Despite the government's and non-governmental organisations' attempt to provide books to schools, there still exists a missing link in the distribution chain. Therefore there is need to study those concerns in the book market.
- b) A study to find out the real problem in the acquisition of textbooks by pupils/parents and the schools and make recommendations on how to solve it.
- c) Lack of information in the field hence making this study necessary so it can come out with recommendations for both the publishing industry and the government on how to get books to schools more effectively.

- d) To make a contribution to the scarce literature available about African educational publishing, which could also be used in other African countries as a resource.
- e) To extend the limited available literature on publishing and booktrade in Kenya.

3.1.4 Research Limitations

The scope of this research is limited to the aims set out in the research questions. This has been so done due to the fact that time and financial resources are restricted. In this study, the research will not be expected to cover the entire publishing industry in collecting data nor to cover the entire country in obtaining the views of textbook users. A sample population has been selected for the purpose of the study. The sample population has been selected with care in order to cover those with different socio-economic backgrounds. Areas selected for this research are Machakos district, Nairobi area and Uasin Gishu district (see appendix 1). The major limiting factor in the selection was to cover areas representative of rural and urban population and covering areas with various economic potentials. In these areas, a sample of teachers and parents were selected as respondents; as many as the budget, personnel and time frame could allow were chosen. The selection of other categories of respondents was also curtailed by the same principles as set above. It was not possible also to cover the entire publishing industry and therefore a sample has been taken to represent the various types of publishing houses. Samples from the various categories of publishing houses were selected for this study.

3.2 Methodological Context

The research being addressed here is Educational publishing under market liberalisation and book consumption. This requires information touching on business activities in the publishing industry, policies governing the publishing industry within the government and the industry, views from the textbook consumers and the distribution channels. For such information to be obtained, it requires more than one method of research technique.

First and foremost, carrying out research in a developing country like Kenya has its own peculiar shortcomings. We must take into consideration that the amount of literature for a such a field is limited in the sense that little other research has been carried out. The accessibility of the limited published information in the field is also another problem. The unwillingness of the respondents in the field to answer questions which according to their judgement may be sensitive is another issue. It is therefore difficult to get information from government officials, publishers or booksellers.

There are a number of methods that are potentially suitable for use in carrying out this research. They include case study, observation, interviews, personal experiences, experiment, life story, archival materials and interaction. To confine oneself to one method in a study of this nature could yield very little. It was therefore decided by the researcher to use more than one method. The methods chosen and used in this research are case study of textbooks, questionnaires, interviews, archival documents, secondary statistical data analysis and review of related literature.

With the absence of proper information management in some institutions, accessibility to past documentation was difficult. It was not possible to rely solely on collections of previous company or government documents. Some government officials or company employees were unwilling to let the researcher access their documents. In some cases, there is genuine fear that if the company business documents are given to strangers, they may be used against them by their competitors. However, in most cases documents which are more than one year old in some companies are destroyed or archived in the stores. It was found out that previous information like print-runs, letters to the authors, sales and initial costs of some case studied textbooks could not be easily accessed. It is therefore difficult to access such information though it could be still be useful to the company's daily activities. These are some of the problems of carrying out research in a developing country like Kenya. It was therefore seen to be appropriate not to rely on one method of research paradigm.

3.3 Methodological Choices

The nature of the research determines the method to be used in collecting and analysing the data. There are two main research paradigms which can be used by researchers to carry out their research: qualitative and quantitative research. It has been difficult to provide an agreed definition of the two methodologies. The only way in which the two have been differentiated is through the tools used in gathering and analysing data. However, it is also assumed that in adopting a quantitative methodology an objective truth exists in the world which has to be revealed through scientific methods where the focus is on measuring relationships between variables systematically and statistically. While on the other hand, in qualitative methodology the emphasis is on deriving meanings from phenomena which can not be quantified easily. Anderson (1998) defined qualitative research as a form of inquiry that explores phenomena in their natural settings and uses multi-methods to interpret, understand and bring meaning to them.³

The whole of the natural scientific process is based on the assumption that a reason can be found for why things are as they are. We note that the world studied by the natural scientist contains elements related to each other in mathematically quantifiable relations with great predictive power. This desire for mathematical rigour has to be adjusted when we move in to the world of the social and behavioural sciences which in the context of the present work. The more our research moves into the world of rational, information-seeking human beings, the greater is the difficulty in controlling the cultural and geographical variables. Yet there is no reason when we move from the quantitative to the qualitative world that we should not use qualitative techniques to obtain deeper meanings from our research.

The other main difference between qualitative and quantitative methodology is also the way the theory is deduced in a research. While in a qualitative approach, theory is generated from data collected, in a quantitative approach, theory is deduced as a result of testing hypotheses. Apart from the theoretical approach, Cassel and

³ ANDERSON, G. (1998) : *Fundamentals of Educational Research. 2nd ed.* : London, Falmer Press, 119.

Symon (1994) suggested that quantitative and qualitative research are appropriate to different types of research problem, implying that the research issues determine (or should determine) which style of research is employed.⁴ From this standpoint therefore, it is possible that both qualitative and quantitative methods can be used together in the same study when and where it is appropriate. The researcher has to make a choice of the method to be used in carrying out the research, but is not restricted to one or the other. It is possible to derive a framework of analysis incorporating both types of data as has been done in this work.

Since the present study is based primarily on qualitative methods, we can acknowledge that this paradigm has gone through various moments and has changed in the process. Denzin (1998)⁵ categorised five periods of qualitative research;

- Traditional moment (1900 - 1950).
- The modernist or golden age moment (1950 - 1970).
- Blurred genres moment (1970 - 1986).
- The crisis representation moment (1986 - 1990).
- Post-modern or present moment (1990 - present).

In the traditional moments researchers concentrated on observing other societies' customs and cultures⁶ and required researchers to travel to foreign countries to observe and write about what other people were doing. This method was most commonly used by the anthropologist; Okely (1994) said that anthropological studies were associated with the study of non-western societies mainly by westerners.⁷ This period has also been associated with (almost dominated by) the positivist paradigm. The modernist or the golden age and the blurred genres moments are connected to the appearance of the post-positivist arguments. Most

⁴ CASSEL, C. & SYMON, G.(eds.) (1994): *Qualitative Methods in Organizational Research* : London, Sage, 3.

⁵ DENZIN, N. K. & LINCOLN, Y. S. (1998) : *Entering the Field of Qualitative Research*. N. K. Denzin & Y. S. Lincoln (eds.) : *Landscape of Qualitative Research: Theories and Issues* : London, Sage, 2.

⁶ Ibid., 1.

⁷ OKELY, J. (1994) : *Thinking Through Fieldwork*. Bryman, A. & Burgess, R. G. (eds.) : *Analysing Qualitative Data* : London, Routledge, 18.

researchers had come to argue that only partial objective accounts of the world can be produced, since the methods used by the positivists were flawed.

It has been difficult to draw a conclusion to say that one or the other paradigm works solely in qualitative research. However, Denzin (1998) and others have continued to argue that qualitative researchers study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them. Qualitative methodology has been used by researchers in basic disciplines and applied fields (psychology, sociology, linguistics, educational research programme evaluation among others). As noted by Miles (1994) it has become increasingly difficult to draw a line of distinction between terms like ethnography, field methods, qualitative inquiry, participant observation, case study, naturalistic methods and response evaluation for they become practically synonymous.⁸

Grounded theory can also be applied in qualitative research where the theory or hypothesis method is discarded. The testing of 'a priori' theories or verification are abandoned and data is collected from the field so as to check if a theory can come out of it. Tesch (1990) said that the researcher suspends all prior theoretical notions, data relevant to a particular sociological problem area would be collected, and then inspected to discover whether any theory or at least hypothesis could be developed directly from the patterns found in the data.⁹ In this research, there was no preconceived model of educational books but data had to be collected in order to develop a model of educational book distribution. This in a real sense is a theory based model developed after collecting data from the field. The policy of streamlining textbook publishing in Kenya is also based on grounded theory.

In the present study the researcher entered into the world of the respondents to obtain their views and opinions on the effects of market liberalisation on educational publishing in Kenya. This leads to both content and statistical analysis. According to Patton (1990) the rules and procedures of the qualitative-experimental

⁸ MILES, M. B. & HUBERMAN, A. M. (1994): *Qualitative Data Analysis. 2nd ed.* : London, Sage, 1.

⁹ TESCH, R. (1990) : *Qualitative Research: Analysis Types and Software Tools* : London, The Falmer Press, 23.

paradigm are aimed at producing internally valid, reliable, replicable and generalizable findings. In its context the present study is clearly limited as an exemplar of quantitative methodology, so we have preferred and adapted a generally qualitative approach.

3.4 Research Strategies Selected

3.4.1 Permission to do Research

In Kenya no one is allowed to carry out fieldwork research without first being cleared by the Office of the President (OP). A research permit application and a fee were submitted to the OP in July 1998, after which a research clearance permit (see appendix 5) was issued. Researchers are required to submit at least two bound copies of their final report/thesis to the OP.

In addition to the clearance letter from the OP, the researcher was also required to have other letters from the education offices of the sampled study areas. With the exception of Uasin Gishu, letters from Nairobi City Council Education department (see appendix 6) and Machakos district education office (see appendix 7) were issued to the researcher.

Although obtaining all the necessary documentation regarding to permissions, some schools would not allow the researcher to interview their staff. This problem was common in Nairobi. The researcher therefore had to make changes to the schools which had been selected.

3.4.2 Overview of Methodology

Necessarily this investigation will have to be wide ranging, focusing not only on publishing houses but also consumers, the needs of education, and the book trade.

The following tabulation presents in broad outline the relationship between research questions, data sought and investigative methods.

Summary of the main methods of achieving the objectives

<u>Objective</u>	<u>Relevant and information needed</u>	<u>Operational method</u>
a) To investigate the growth of the market of educational books	-enrolment in schools within a time period -the sales and print-runs of books	-Historical and qualitative study through both

	<p>within a time period</p> <ul style="list-style-type: none"> -the number of publishers doing educational publishing within a time period -the size and number of booksellers within a time period -other book outlets like libraries etc. 	<p>published and unpublished materials</p>
b) To examine market opportunities for the publishing industry	<ul style="list-style-type: none"> -government policies on curriculum/syllabus -government policies on book business sector i.e. imports and exports -the trends in school enrolments -policies of professional bodies touching on the book industry(Booksellers assoc. & publishers assoc.) 	<ul style="list-style-type: none"> -Contact with relevant organisations -from published and unpublished materials
c) To investigate the trend of educational publishing in Kenya	<ul style="list-style-type: none"> -historical background of selected publishing firms -historical background of some selected booksellers/distributors -changes in publishing policies 	<ul style="list-style-type: none"> - from published and unpublished materials - sampling to determine the organisations to study
d) To gain an understanding of the market aspects and factors that affect the distribution of educational books	<ul style="list-style-type: none"> - supply and demand information in the industry -the suppliers of paper and printing facilities -the number of print-runs of books -the spread, quality and quantity of distribution points -the purchasing power of the customers -number of school going children 	<ul style="list-style-type: none"> - contact with organisations concerned -through interviews with the publishers -through published and unpublished materials
e) To examine the procedures used in adoption of school	<ul style="list-style-type: none"> -who determines books as class textbooks? 	<ul style="list-style-type: none"> - contacts with teachers and Kenya Institute of

textbooks in both primary and secondary schools	-Step by step methods used	Education(KIE) with publishers
f) To examine the effects of pricing of textbooks in various market category groups	<ul style="list-style-type: none"> -comparison of same subject book prices and sales figures from different publishers -their reception in the market 	<ul style="list-style-type: none"> - sampling of some subjects and titles from sampled publishers -reactions from schools and libraries sampled -use of publishers stocklists in sampling
g) To investigate the customer views on school textbooks authored by Kenya Institute of Education	<ul style="list-style-type: none"> - reception of books from different authors by the students/teachers in terms of sales -what is said in the market about books from KIE and individual authors 	<ul style="list-style-type: none"> -contacts from relevant sampled persons -sampled titles and comparisons
h) To relate publishing in Kenya with other countries in Africa	Historical and present nature of publishing activities in some countries	-published materials
i) To investigate the flow of information on educational books from publishers to the market place	<ul style="list-style-type: none"> -ways of passing information by publishers to schools, bookshops and to the general public -what is included in the information pack -ways used by booksellers to reach the customers 	contact with the relevant organisations
j) To make recommendations on how to enhance and strengthen the distribution of educational books	-the findings of the research	<ul style="list-style-type: none"> -comparison with previous policy reviews -content analysis

3.4.3 Areas Covered in the Study

Ideally, this research was to cover the entire country since the study is about educational publishing in Kenya. There are eight provinces in Kenya including the Nairobi area (see appendix 1). These provinces are divided into district administrative units. Each of the districts is further subdivided into small administrative units known as divisions. Unlike other provinces Nairobi area is divided into divisions and not districts.

However, due to financial, personnel and time constraints, it was decided that some areas be sampled for the purpose of this study. Three areas were selected to be representative of the country. In selecting these areas, the socio-economic factors, geographical conditions and level of development were considered. This was to get a good cross-section of the Kenyan population. On the basis of the above the areas selected for the purpose of this research were Uasin Gishu district in Rift Valley province, Machakos district in Eastern province and Nairobi city.

Table 3.1 : Areas Selected for the Research

District	Characteristics
Nairobi	Urban Tertiary sector type of economy
Uasin Gishu	Urban with a vast majority rural hinterland Tertiary sector and Agricultural economy both large and small scale farming
Machakos	Rural mostly arid and semi-arid land Subsistence farming mostly livestock rearing

Uasin Gishu district is a medium developed district with a blend of rural and semi-urban characteristics with higher agricultural potential. Machakos district is one of the districts situated in lower altitudes and has the characteristics of rural population and is in the arid and semi-arid lands of Kenya. Nairobi being the largest metropolitan area in the country was to represent the urban population. With these three areas and the different characteristics, it was deemed that the information collected will have a representation of the entire country.

When these areas had been identified a formula of sampling those to be interviewed was developed. The first task was to select the schools in which teachers and parents will be sampled from. As in any other district in Kenya, these districts are divided into provincial administrative divisions.

In Uasin Gishu district there are seven divisions namely; Ainabkoi, Kapsaret, Kaptagat, Kesses, Moiben, Soy, and Turbo. The district's population as per 1989 census was 445,530¹⁰. It covers an area of 3,218 square kilometres and its altitude varies between 2,100 metres in the southern end and 1,500 metres above sea level in the northern end. The district has fairly reliable rainfall and good fertile soils hence making it a high-potential agricultural area in Kenya. The major source of income to the majority of the population is agricultural produce, mostly wheat, maize and dairy farming. The district accommodates Eldoret town which is one of the upcoming urban commercial centres in Kenya.

There are 348 primary schools and 75 secondary schools in the district with 44 primary schools and 16 secondary schools in Eldoret town. Among these schools there are 12 privately run schools of which eight are primary schools and four are secondary schools.

Machakos district is one of the districts in Eastern province of Kenya. It covers an area of approximately 6,051 square kilometres with an altitude ranging from 700 metres in the south to 1,700 metres above sea level in the northern part. The district is generally dry with annual average rainfall ranging between 500mm and 1300mm. It receives low and unreliable rainfall making it one of the arid and semi-arid lands in Kenya. The people depend on subsistence farming, and livestock rearing.

The district has eleven divisions in total namely; Athi River, Central, Kalama, Kangundo, Kathiani, Masinga, Matungulu, Mwala, Ndithini, Yathui and Yatta. It had a population of 765,008 as per 1989 census and was estimated to be 1,041,989 in 1999 basing on an estimated population growth rate of 3.09 per cent.¹¹

¹⁰ Kenya. Central Bureau of Statistics (1996) : *Statistical Abstract 1996* : Nairobi, Ministry of Planning and National Development, 6.

¹¹ Kenya. CBS (1997) : *Machakos District Development Plan 1997 - 2001* : Nairobi, Ministry of Planning and National Development, 43

The district has 801 primary schools of which 785 are public and 16 are private. There are 145 secondary schools, 121 are public and 24 are private schools. These schools are not evenly distributed in the district, divisions with low population density have fewer schools than divisions with high density and high agricultural potential.

In Nairobi, there are seven divisions namely; Dagoretti, Embakasi, Kasarani, Langata, Makadara, Starehe and Westlands. Nairobi city is the largest urban area in Kenya with a population of 3 million. Since the city has areas occupied by the poor and the rich, it was decided that one of the divisions which is distinctively occupied by the poor be selected and another occupied by the rich be selected. It was not difficult to do this because Starehe division covers one of the largest slum areas in Nairobi and in fact one of the largest unplanned and unserved areas in Africa¹². These slums are Mathare valley, Korogocho and Jericho. On the other hand Westlands division is one of the divisions occupied by the rich in the town. Most of the residents in the division are business people and Asian communities. After selecting the two divisions, the other three were selected randomly from a list of the remaining divisions which had been listed without any preference.

The researcher had decided to select twenty schools at random from each of the three selected districts. From these schools, ten parents and ten teachers were to be sampled for interviewing. This could have resulted to a total of 60 schools of which twenty respondents would have been selected from each school giving a total of 1200 respondents. This was viewed as a large number and could have been a problem for one researcher to cover within a short period of time. This research is aimed more at obtaining a qualitative data and not so much on the quantitative side. The other obstacle to this was the communication and monetary factor. The researcher decided to select ten schools from each district with five parents and five teachers to be selected from each school. In the selection of the sample schools, it was decided that in order to get a balanced view the selected schools should be a representative of private schools, schools in the rural area and those in the urban area.

¹² LEE-SMITH, D. (1993) : *Women and Shelter in Kenya* : Nairobi, Mazingira Institute, 10.

The main purpose of interviewing teachers and parents in this research was to get the views of the users and buyers of textbooks. The interview questions covered include the personal details, views on cost of textbooks, how they get access to them, the coverage of syllabus in the books and how to make textbooks readily accessible to them.

3.4.4 Preliminary Fieldwork

The fieldwork was conducted in Kenya. A preliminary visit was made in August/September 1997 to prepare the ground for the study. The purpose of the visit was to familiarise and make contacts with the potential respondents in the publishing and booktrade industry. During this period the following people were met;

1. Mr. C. D. Shah, General Manager, Text Book Centre, which is one of the largest book distribution firms in Kenya;
2. Mr. W. Khavuchi, Sales and Marketing Manager, EAEP, which is one of the leading indigenous educational publishing house in Kenya;
3. Mr. J. K. Muraya, Marketing Manager, KLB, which is one of the two parastatal publishing houses in Kenya, publishing textbooks prepared by KIE;
4. Mr. J. Kiarie, Marketing Manager, OUP, which is one of the leading foreign publishers in Kenya;
5. Miss E. Ng'eno, Librarian in-charge of Reference and Bibliographic section, KNLS headquarters (the main Public Library in Kenya);
6. Mr. S. Karani, Senior Editor, JKF, which is one of the leading state-owned publishing house;
7. Mr. J. Wamae, Director, Chania Bookshops and Secretary of Kenya Booksellers and Stationers Association (KBSA).

Apart from those listed above, three government officials working in the Curriculum Centre and Schools Equipment Supplies Unit were contacted but they requested to remain anonymous. Contacts were also made with the Chief Inspector

of Schools (CIS), a director in KIE and a number of booksellers. Among the booksellers contacted were the Managers of Savanis Book Centre, Elimu Book Distributors and Kesho Book Centre. When these groups of people were met, informal preliminary interviews were conducted. These meetings were very important for preparing the ground for the research and also collecting documented information for the purpose of writing and reshaping the research proposal which was approved by the Research Degrees Committee in November 1997.

A year later in June/September 1998, the researcher travelled to Kenya to carry out interviews with publishers, booksellers, librarians and government officials. On this occasion a pilot study was carried out on the users of textbooks. The opportunity was also used to check if there had been any change in the textbook market. There were a number of events that had taken place in the textbook publishing and marketing environment. One important thing that had taken place was a new policy on publishing and procurement of textbooks mainly for primary schools. There had been also a pilot study on the procurement of textbooks in schools in two districts, Machakos and Liakipia. This was also to prepare the ground for the real fieldwork/survey for the research.

The people interviewed during this period were mostly those in top managerial positions in their respective companies. They were;

1. Mr. H. Chakava - Managing Director, EAEP
2. Mr. D. Muita - Managing Director, Macmillan Kenya Publishers
3. Mrs. J. Njoroge - Managing Director, Longhorn Kenya Ltd.
4. Mr. J. Githenji - Publishing Manager, KLB
5. Mr. D. Sosion - Publishing Manager, Longhorn Kenya Ltd.
6. Mr. S. Karani - Acting Publishing Manager, JKF
7. Mr. O. Kiminza - Head of Research and Evaluation Division, KIE
8. Mr. O. Odhiambo - Research and Evaluation Division, KIE

3.5 Methods Adopted

In order to execute this research appropriately and in depth, a number of methods were considered. It could have been carried out through case study, interviewing, observation, personal experience, historical data, visual text or experimentation. It was decided that to answer the questions set out in this research it was appropriate that interviews, case study of textbooks, archival documents and available literature be used. Interview is a process initiated by the interviewer for the specific purpose of obtaining research relevant information and description, prediction or explanation.¹³

Interviews are one of the tools used in collecting data for qualitative research. Interviews can be carried out in a number of forms; individual face-to-face, group face-to-face and telephone surveys. Some researchers can do their interviews informally or formally with structured, semi-structured or unstructured questions. During informal interviews, the researcher will have to engage the respondent in a conversation, the respondent(s) may not be aware that he/she is being interviewed. The conversation should be focused, as Anderson (1998) said interview is a highly purposeful task which goes beyond mere conversation.¹⁴ For this research during the preliminary stage, informal interviews were held with respondents and notes were written down during and after the interviews.

3.5.1 Questionnaire

A questionnaire had been developed and there was also an opportunity to pilot-test the questionnaire. This questionnaire was later amended to be used in the research. The first intention was to develop a self-completed questionnaire to be distributed to the respondents and collected at a latter date. During the pilot-testing period in June/September 1998, some problems were discovered. Some respondents seem to have misunderstood some questions while others seem to have discussed what to write before filling the questionnaire. This type of problem had been experienced by Adeya (1997) when conducting research on electronic scholarly publishing in

¹³ ROBSON, C. (1993) : *Real World Research: A Resource for Social Scientists and Practitioner - Researchers* : Oxford, Blackwell, 229.

¹⁴ ANDERSON, G. (1998) : *Fundamentals of Educational Research. 2nd ed.* : London, Falmer Press, 190.

Kenya. She had to abandon the use of questionnaires since she thought the results could be misleading as the views of the respondents will have been missed or distorted.

In the judgement of the researcher, reliance on such information could lead to misleading findings and at the end of the research, the objectives will have been missed. It was therefore decided that with such a scenario prevailing, the information gathered might not be of very much use to the study. The questionnaire was amended to avoid the misunderstood questions or rewriting them. And the strategy was changed from a self-completed questionnaire to interview questionnaire in order to safeguard the validity of the data gathered. The importance of this was that the interviewee was relieved of the trouble of filling in the questionnaire. There has been a tendency of some respondents not answering some questions objectively when filling in questionnaires. This scenario was prevalent in the pilot-tested questionnaires.

3.5.2 Interviews

Consumers and/or users of textbooks were also formally interviewed. A structured interview process was applied for this group. A questionnaire was developed with both open-ended questions and close-ended questions (see appendix 8) was used. The answers solicited from this group were short. Research Assistants were used to interview some of the respondents. These research assistants were formally given a one day training by the researcher. The research assistants were three postgraduate students of Moi University - Faculty of Information sciences and two former faculty students. These research assistants had to be familiar with the sampled study areas.

The interviews were carried out in two sets. The unstructured interview sessions with publishers, booksellers and government officials were carried out in person by the researcher in June/August 1998 and July/August 1999. A structured interview questionnaire was used to solicit information from the textbook customers and users with the help of research assistants who were postgraduate and former students in Faculty of Information Sciences, Moi University.

Five research assistants were recruited and trained by the researcher before sending them to the field to administer the questionnaire. The target respondents for the interview questionnaires were teachers and parents. How these respondents were sampled will be discussed later in this chapter. The venues for the interviews were schools in the case of teachers and arrangements were made to meet the selected parents in their homes, work place and for some arrangements were made with the headteacher for them to come to school.

3.6 Sampling and Fieldwork

3.6.1 Sampling

In any research a target population in which the researcher has to draw a sample from has to be defined. In this research, the population has been categorised into government officials (policy makers), producers, gatekeepers (booksellers and librarians) and the users (consumers). When these groups were identified a sample from the population of each group was selected and their views and opinions taken.

Policy Makers and Government Officials

In this category, the target population were those who are in-charge of curriculum development and those who implement the policies. The officers to be interviewed were those based in the Ministry of Education headquarters and those in the curriculum centre - KIE. During the preliminary visit (1997), contacts were made with the Chief Inspector of Schools (CIS) who agreed that he will be helpful in this research. Before the second visit (1998), letters were sent to the government officials in the ministry of education.

The unstructured interview method was used in soliciting information from this group of people. This method was chosen for its flexibility which could allow in-depth interviewing and probing.

Publishers

Ideally, all publishing houses in Kenya could have been covered in this research. There are well over three hundred publishing houses that have been assigned ISBNs by KNLS but not all of them engage in active publishing. Some of these

houses publish periodicals and some have even gone out of business. Those who engage in educational and textbook publishing are twenty three publishing houses. The twenty three were reached by using the list of recommended textbooks (Appendix 3).

In order to get a sample of publishers to be interviewed for this research, a small sample was decided to be taken from the publishing houses. In the initial stage, the researcher decided to categorise the publishing houses by ownership. Four categories emerged from this categorisation, government owned, indigenous private owned, foreign owned and religious owned publishing houses. The top two publishing houses were taken from each category. Letters were mailed to the eight publishing houses before travelling to Kenya in June 1998. When these publishing houses were contacted later while the researcher was in Kenya, it was found out that due to changes in the curriculum and competition in the textbook market two of the publishing houses had ceased publishing textbooks. Unfortunately, the two were the religious owned publishing houses.

During June/September 1998, those selected for interviews in the publishing houses were those in the top management level, that is the managing editors, managing directors, general managers and senior editors. The terms used in each publishing house in the management structure are different hence the differential in the names of positions. For instances a senior editor, publishing manager and managing editor mean the same thing. Their functions in their respective institutions are the same.

The interviews were extended also to the top managers in the marketing and distribution section. The Sales and Marketing managers, Marketing Directors or Executives were interviewed. In the second fieldwork in July/September 1999, concentration was given to interviewing subject editors. This was a follow-up on the data which had been collected in the previous year.

The following were interviewed during the second fieldwork period;

1. Mr. N. Muriuki - Editorial Manager, OUP
2. Mr. D. Ngang'a - Editor, Macmillan Kenya Publishers
3. Mr. S. Karani - Deputy Publishing Manager, JKF

4. Mrs. M. Khasiani - Chief Editor, KLB

5. Mr. K. Mukundi - Science Editor, KLB

Schools and Teachers

The researcher went to the education offices of the respective districts. He was given the list of schools in the area and with the help of the education officer, the schools to be visited were selected. When the schools had been selected the researcher had to visit the schools before-hand to book an appointment for the interviews. During these visits, some headteachers declined the requests and the researcher had to select another school.

The ten schools from each district were both primary and secondary schools of which six were primary and four secondary. In the three districts, a total of thirty (30) schools were to be selected of which 18 were primary schools and 12 secondary schools. However, 29 schools were successfully visited by the researcher and their teachers and parents interviewed. There was a problem in Nairobi; some of the schools initially selected with the help of the Education officer prohibited the researcher from carrying out the research in their schools. The schools which refused were the privately owned schools. The other problem was that the interviews in Nairobi was taking place in the two last weeks of July when schools were preparing for August vacations and it was difficult to find a substitution for the schools that declined. In the end the researcher and his two assistants successfully visited nine schools in Nairobi.

In Uasin Gishu, since all the privately run schools were located in the town, it was decided that one private school each from primary and secondary school be selected. These schools were selected at random from the list.

When these schools had been selected, teachers and parents of the schools were to be sampled as respondents for the interview questionnaire. The researcher contacted the headteachers of schools selected beforehand by making visits. These headteachers were given an explanation of the purpose of the research.

In each school five teachers were sampled. It was decided that all the headteachers (deputy headteacher if the headteacher was not present) be selected and another

four teachers to bring a total of five teachers per school. In primary schools, it was seen that in order to get a representation of both lower and upper primary teachers' views, one lower primary (those teaching children of 6 -8 years) and the other three from upper primary (those teaching children of 9 -13 years) be selected. The method used to select teachers was not scientific in any way. With help of the headteacher or the deputy, teachers teaching certain subjects in upper primary were selected by convenience and opportunity.

In secondary schools, the method of selecting teachers was almost the same, the headteacher or his/her deputy was interviewed and another four teachers. The other four teachers were selected with the help of the headteacher considering the subject and the class the teacher is teaching.

In selecting the parents of the school, a non-scientific method of sampling was employed. With the help of the headteacher, parents of the school were identified and interviewed. In some cases, teachers who have their children in the school were interviewed as parents. The headteacher had been requested by the researcher to inform the parents selected through their children so as to come to school or if it was not possible to be visited in the work place. In some instance, especially in the rural areas, the researcher had to visit the parents in their homes. However, in some boarding schools it was not possible to get access to the parents since children come from far away places. In such schools the researcher could only manage to interview those who are teachers in the school and parents as well. This method of sampling was applied in all the three sampled areas.

Case Studied School Textbooks

In selecting titles to be case studied, books on the list of recommended books were taken as the target population. Since this list contains books from more than twenty publishing houses, it was considered to be fair to take titles from publishing houses who had more titles on the list. The top six publishing houses were considered and these publishers also are the leading publishing houses in educational publishing. After identifying them as Longhorn Kenya Ltd, EAEP, JKF, KLB, OUP and Macmillan, a list of them was drawn with no preference at all. The researcher decided for convenience purposes, to select eight textbooks, four from primary

section and another four from secondary school level for study. After listing the publishing houses, cells named primary and secondary were developed and numbered. The list was as follows;

Table 3.2 Sampling of Publishers

Publishers	Primary school textbooks	Secondary school textbooks
Longhorn	12*	6
OUP	11	5*
EAEP	10*	4*
KLB	9	3*
JKF	8*	2*
Macmillan	7*	1

The Cells with a star () represents the publisher whose books will be selected.*

After creating the cells on the table, the cells were numbered from bottom right up as shown from the table above. A table of random numbers was used in selecting the cells corresponding to the publishers and level at which the book will be drawn from. The resulting selection gave primary school textbooks from Longhorn Kenya, EAEP, JKF and Macmillan Kenya Publishers for the case studies. Secondary school textbooks from the following publishing firms were to be studied: OUP, EAEP, JKF and KLB. After this, a list of the books were selected at random from each publishing house which had been selected. When the book titles had been identified, publishers were consulted and gave their opinions. Unfortunately, when publishers were contacted, one of them didn't agree for their title to be included in the case study. The researcher was therefore left with seven titles for the case study.

The information needed from these textbook titles were how they were authored, their print-run, their sales and views from the users. These information were gathered from the publishers and the users. The researcher requested the publishers to open up files and other documentation about the titles which had been selected.

When the publishers were contacted, four of the publishers gave the researcher access to the files of the titles. However, the researcher was not able to get access to files of one publishers whose two titles had been chosen. The editorial staff of this

particular institution were busy preparing the company's annual results. Although this was the case, the researcher was given permission to include the titles in the case studied titles.

3.6.2 Calendar of Fieldwork

In August/September 1997, the researcher made a reconnaissance visit to the publishing industry in Kenya. The purpose was to make contacts with people concerned in both government and industry. The people met during the visit were those who hold positions in and make decisions about the publishing sector. They included a number of Marketing and Sales Managers and Assistant Sales and Marketing Managers of various Publishing houses in Kenya. The response was encouraging for they were willing to answer questions and give information as regards to distribution of educational books. The researcher also met the General Manager of Text Book Centre (one of the biggest wholesalers and retail bookshops in Kenya); who was willing to give information during the real research. The Secretary of Kenya Booksellers and Stationers Association (KBSA) (a body representing major Booksellers in Kenya) was also met by the researcher.

The researcher also visited the KNLS headquarters where he talked to the Acquisitions Librarian. The library also publishes a yearly Kenya National Bibliography (KNB) which was useful in determining the number of published books in Kenya. Books about Kenya which were published outside the country were listed also in KNB; since such entries were published outside the borders of Kenya, they were therefore not included on the statistics of this study.

During August 1998, when the CIS was met, he had arranged for one of his deputies to be interviewed. The CIS was informally interviewed and he handed over to the researcher a policy document on textbook procurement in primary schools. Apart from interviewing the officials in the ministry two directors in the curriculum centre were also interviewed. In July-August 1999, the Deputy Chief Inspector of Schools was interviewed. In this session, among the questions put to him were how the new policy on textbook publishing was being implemented, what the government was doing to help those who can not afford purchases of textbooks, how much money has the government been allocating for textbook purchases, what

criteria has been used in any sharing of money for textbook purchases and how the government is planning to meet the needs of textbook users and textbook producers. The deputy CIS was helpful enough to allow the researcher to go through some file documents touching on textbook provision, and some photocopies were made from some files.

Formal interviews were arranged that took place in June/September 1998 with Publishers, Booksellers, Librarians and Government Officials. During these sessions a semi-structured interview (see appendix 9) process was used and notes were taken and tape recording as well. The tape recording did not take place in all interviews since some respondents declined to be tape recorded. All the unstructured interviews were conducted by the researcher in person. These interviews took place in the offices of the respondents.

3.7 Critical Evaluation of the Methods

As stated early in chapter three, the aims of this research are to gather information about publishing and distribution of educational books under a market liberalised environment. This required views and opinions of people about textbooks and the market scene. For these views to be recorded and taken into consideration in the study a method had to be devised for the collection of the data.

The following are empirical materials that may be used in collecting data for qualitative research;

- case studies,
- personal experience,
- introspective,
- life story,
- interview,
- observational,
- historical,
- interactional and
- visual texts.

Of these, the following were used, interview, case study of textbooks and publishers and historical data. As mentioned by Denzin (1998), qualitative researchers deploy a wide range of interconnected methods, hoping always to get a better fix on the subject matter at hand.¹⁵ Burgess (1997) stated that no method is considered superior to any of the others, for each has its own strengths and weakness, especially when considered in relation to a particular problem.¹⁶ The flexibility of adopting more than one method in this research was dictated by the nature and conditions that were prevailing in the field and the research itself.

3.7.1 Investigation of the wider context

The study reviewed relevant literature to the research. The specific research instruments used to investigate the wider context are library research and documentary evidence by using such sources as books, company annual reports, government departmental reports and journal/periodical/newspaper articles. Libraries and Learning Resources Centres in the UK and Kenya were used to get access to such materials. These helped to gather information about textbook publishing and market liberalisation.

3.7.2 Consultation of Records and other Documents

Primary sources of information such as correspondence, unpublished reports, conference proceedings, publishers' catalogues/price lists, KNB, annual reports and other unpublished documents were used in the fieldwork in Kenya.

Official statistics from UN, World Bank, Kenya Government and other organisations were used in the process of carrying out this research. According to Peil (1985) most of such statistics contain a substantial margins of error and should not be allowed to govern the use of statistics in scientific inquiry.¹⁷ Though in this research some statistical data were derived from official publications, it was discovered that there was some variance in some publications. For instance the

¹⁵ DENZIN, N. K. & LINCOLN, Y. S. (1998) : *Entering the Field of Qualitative Research*. N. K. Denzin, & Y. S. Lincoln (eds.) : *The Landscape of Qualitative Research: Theories and Issues* : London, Sage, 3.

¹⁶ BURGESS, R. G. (1997) : *In the Field : Introduction to Field Research* : London, Routledge, 143.

¹⁷ PEIL, M. (1985) : *Social Science Research Methods: an African Handbook* : London, Hodder & Stoughton, 47.

number of published titles in Kenya according to The Directory of Publishers in UK and Commonwealth were different from those collected from the publishers themselves. It was therefore decided that statistical data for the research be sourced directly from the Kenya National Bibliography and the publishing houses.

3.8 Data Management and Analysis

Before analysing the data collected, it is paramount that they are processed into a manageable format and stored for easy retrieval. The raw data should always be processed immediately after receiving, for instance correcting, expansion of texts, transcribing if taped, inputting into computer and storing them. In the case of this study, the data collected were in form of notes, tape recorded interviews, interview questionnaires and copies of official documents. In processing the raw data, the notes were initially corrected and some expanded before inputting them into the computer. The tape recorded interviews were transcribed and typed while the interview questionnaires were coded before inputting them into the computer.

Since this research, involves collection of statistical data on books and textbooks published, the results will include both qualitative and quantitative data. This method has been advocated by various writers in research on social sciences.¹⁸

The software package used in processing data for this research is SPSS for Windows. After coding the interview questionnaires, they were prepared and inputted into the computer. After all the answers were in and stored in the computer, editing was done in order to ascertain that what had being keyed in tallies with the data on paper. A simple analysis process of univariate analysis was done, which involves obtaining simple frequencies of the answer. Further in processing the data, cross-tabulations was also applied. This was to enable the researcher to cross-classify the respondents' answers to more than one answer. For instance how many people from region "C" were earning less than Kshs 8000.00.

In the interview questionnaires, there were open-ended questionnaires which could not be coded as the others. The answers of those questions were classified as per

¹⁸ PATTON, M. Q. (1990) : *Qualitative Evaluation and Research Methods* : London, Sage, 10 ;
YIN, R. K. (1984) : *Case Study Research: Design and Methods* : London, Sage, 82.

what the respondents' answers. They were clustered as per themes and the occupations of the respondents. These were later used in cross references and linking them together. These were used to quote the respondents in verbatim as per what their thoughts and views were.

CHAPTER FOUR

USERS AND CONSUMERS OF TEXTBOOKS IN KENYA

4.1 Introduction

Since the government abolished the free distribution of textbooks in 1984 and introduced cost-sharing schemes, it has been the responsibility of parents and Parents Teachers Associations (PTA) to purchase books for their schools and therefore a great opportunity for the growing educational publishing industry. In most cases the PTAs are not well enough organised to execute the responsibility of purchasing textbooks. However, if the PTA is not taking the lead, each individual parent will have to buy textbooks for their children. This method of cost-sharing had negative effects in some areas where parents have lower incomes. The government, with the help of some donors, had to intervene in some areas (classified as ASAL areas) in 1991 by providing textbooks.

As in any other business, textbook users and consumers have an important role to play in the educational publishing industry. In this study, the views of the users were solicited and taken into consideration in writing this thesis. A representative number of teachers and parents who are the main users and purchasers of the textbooks were interviewed. As stated earlier in this research, the width and breath of the country could not be covered and therefore three areas were selected namely Machakos district in Eastern province (rural and ASAL region), Nairobi area in the central region (urban) and Uasin Gishu district in Rift Valley province (rural and Eldoret town as semi-urban).

4.2 Characteristics of the Market and the Sample User Population

4.2.1 The Market in General

Since independence the number of all types of schools in the country has increased from less than 7,000 schools in 1963 to over twenty thousand schools in 1996 (see table 4.1). At independence in 1963, there were 6,058 primary schools and 150

secondary schools.¹ This means that the potential market for educational books has increased. However, it is not automatic that all those enrolled in these schools would be the actual customers who will purchase textbooks, but nevertheless they will use them in their course of learning. The increase in the number of schools indicates that there has been an increase in number of those who have joined schools, and thus likely to increase the demand for educational learning materials (textbooks).

Apart from the increase in the number of schools, it is also possible to plot the pattern of increase in enrolment. At independence (1963) the numbers of pupils in primary schools were 891,058 and 28,764 in secondary schools² (see table 4.2). This had risen to 2.116 million children in primary schools and 37,000 in secondary schools by 1974. By 1996 there were over 6 million children in both primary and secondary schools in Kenya of which over 5.5 million were in primary (6 -13 year olds in the 8 - 4 -4 education system) and another 0.6 million were in secondary schools. It can be noted that primary education in Kenya is compulsory from 6 - 13 years on statute and nominally free. However, in reality there are various parental charges whose effect may be to exclude some from compulsory attendance.

As seen in Table 4.2, the number of children enrolled in Kenyan schools had been on the increase with an exception of 1990 and 1993 when there was a drop in number of those enrolled in schools. In 1990, the cause of the decrease could be attributed to change of education system from 7-4-2-3 to 8-4-4 and leading to the abolition of the A-level classes in secondary schools. The effect on the educational publishing sector was the decrease in the number of subjects covered in schools due to loss of some classes and therefore a loss of market for the textbook titles which were already in the market. In 1993, there was an overall decrease in the number of children in both primary and secondary school levels. This could have been the knock on effects of the down-turn events of 1990 to 1992 in the economy. The change in real GDP declined from 4.2 per cent in 1990 to -0.8 per cent in 1992 with

¹ Eshiwani, G. S. (1990) : *Implementing Educational Policies in Kenya* : Washington, World Bank, 2.

² Ibid. Op cit.

a slight increase to 0.4 per cent in 1993.³ This therefore affected the purchasing power of the consumers: that is the market for the educational publishing industry. Since the government had already introduced the cost-sharing scheme in schools, parents could only send their children to school if they had the ability and money to meet the associated costs (purchasing of textbooks, writing materials, uniforms and other miscellaneous costs).

The increase in population and school enrolment should present a favourable environment for the growth in educational publishing. In pre-independent Kenya and the first decade of independent Kenya, the multinational publishers formed the majority of players, and dominated the educational publishing field in the country. Each succeeding decade in general appeared to support conditions for a growing educational publishing industry. However, for the conditions to be effective and influence the growth of the industry, there is need for other factors to be favourable and in harmony.

It is assumed that as the number of schools and pupils increase, there will be a demand for more textbooks needed in the market. This presents an opportunity for the publishers to expand and be innovative on how to meet the demands of their expanding market.

The annual input of titles into the market is a useful indicator of market growth; so too is the number of copies actually sold. The latter statistics will indicate the presence of disposable income, the desirability of the goods sold, and increase the capability of the publishing houses to finance new titles. As it was with foreign publishers, mostly British (e.g. Heinemann, Longman, Macmillan and OUP), their titles sold in Kenya as textbooks and were also sold in other African countries but under different covers. Their growth and expansion were based on the number of copies being sold in order to finance their operations.

³ UBS (1997) : *The UBS Guide to the Emerging Markets* : London, Bloomsbury, 369., Kenya Fact Book Update <[www.http://africaonline.co.ke/AfricaOnline/marketplace/newsread/factbk2.html](http://africaonline.co.ke/AfricaOnline/marketplace/newsread/factbk2.html)> available on 3/6/1998.

Table 4.1 Number of Schools 1987 - 1996

	Primary Schools	Secondary Schools
1987	13,849	2,592
1988	14,288	2,717
1989	14,691	2,654
1990	14,864	2,678
1991	15,196	2,647
1992	15,465	2,632
1993	15,804	2,639
1994	15,906	2,834
1995	16,115	2,878
1996	16,552	3004

Sources: Development Plan 1997 - 2001, Economic Survey 1996, 1998

Table 4.2 School Enrolment in Kenya 1987 - 1996

Year	Primary Schools	Secondary schools	Total
1987	5,031,340	522,261	5,553,601
1988	5,123,581	540,192	5,664,316
1989	5,389,148	640,735	6,029,883
1990	5,392,319	618,461	6,010,780
1991	5,455,996	614,161	6,070,157
1992	5,563,987	629,062	6,193,049
1993	5,428,396	531,342	5,959,738
1994	5,557,008	619,839	6,176,847
1995	5,544,998	632,388	6,177,386
1996	5,597,700	658,253	6,255,753

Source : Statistical Abstract 1995, 1998; Development Plan 1997 - 2001

4.2.2 The Sample Study of Consumers

The respondents selected for this study were teachers and parents. The method of identifying these respondents who were interviewed using the interview questionnaire has been explained in chapter four. Parents were those who had

children in the specific schools visited. There is a group of respondents who were parents/teachers; these were people who had children and/or a child in the school they were carrying out their duties of teaching. It was not possible though to establish whether those other teachers interviewed had children in the same school or in other schools since they were identified by the subjects they were teaching.

In the study, the total number of respondents were 252 with a composition of 129 females and 123 males. Among them, there were 198 teachers in total of which 48 of these were interviewed as parents (interviewed once only to answer the questions as a parent). There were 54 non-teacher parents, that is parents who were not in the teaching profession; these include farmers, office clerks, artisans, business people, librarians, university workers, cleaners, civil servants and bankers among other professions. The final sample thus comprised 102 interviewed as parents and 150 interviewed as teachers.

Table 4.3 Level of education of the respondents

Level of Education	Number
Never attended school	1
Attended more than one year of primary school	3
Primary school graduate	13
Secondary school graduate	63
College certificate or diploma	111
University graduate	61

The level of education of the respondents varied from those who had no formal education to holders of doctoral degrees. Their level of education was in the following categories; those with primary school certificates (including one who had never attended school and three who had not completed primary education) were 17 representing 6.7 per cent of the respondents; those with secondary school certificates with no further training were 63 representing 25 per cent of the respondents, those who had college certificates or diploma were 111 representing 44.1 per cent and those with university degrees were 61 representing 24.2 per cent of the respondents. However, this does not reflect the literacy ratios among the

Kenyan population as the respondents selected were those the researcher was able to make contacts with and being teachers were literate.

Table 4.4 Age categories of the respondents

Age Categories	Number
29 years and under	40
30 - 39 years	119
40 - 49 years	71
Over 50 years	22

Their ages also ranged from below the age of 29 years to over 50 years old. Those of ages 29 years and below were 40 representing 15.9 per cent, those between 30 and 39 years were 119 that is 47.2 per cent, those between 40 and 49 years were 71 representing 28.2 per cent and the over 50 years old were 22 representing 8.7 per cent of the respondents. The spread of age groups reflects the population demography in Kenya of a young population. In the 1989 population census, those who could read and write (literate) were 69.4 per cent of the total population. The age group with the highest literacy ratio were those of ages between 15 - 19 years (in 1999, their ages 25 - 29 years) with 89.2 per cent.⁴

The distribution of age groups as per their residential places were as follows, those of 29 years and below were seven in Uasin Gishu, 24 in Machakos and nine in Nairobi area. Those in the age category of 30 - 39 years were 58 in Uasin Gishu, 28 in Machakos and 33 in Nairobi area. Those in the age group of 40 - 49 years old, 24 were in Uasin Gishu, 27 in Machakos and 20 in Nairobi while those over 50 years, one was in Uasin Gishu, 13 in Machakos and eight in Nairobi area. This demonstrates that the majority of those aged 39 years or less live in rural and semi-urban areas.

In this study it was found out that the majority of the teachers were below the age of 39 years. It was found out also that out of 40 respondents of 29 years and below, 34 of them were teachers.

⁴ Kenya. CBS (1994) : *Kenya Population Census 1989, vol. 1* : Nairobi, Ministry of Planning and National Development, 5-2.

The education level of the respondents reflects the fact that education in Kenya was accessible to more of the population after independence. The majority of those in the bracket of 40 years and above (that is 77 out of the 93 respondents) had a maximum level of education of college certificate or diploma. Among the younger population (39 years and below), most of them had gained a university degree; out of the 39 respondents of the ages 29 years and below, 20 of them were university graduates. This study also revealed that out of the 158 respondents who were aged below 40 years, 116 of them had achieved a minimum qualification of a college certificate or diploma and above. This reflects the increase in education opportunities in Kenya after independence in 1963. Those of the ages of 39 years old were about three years old in 1963 and therefore were among those who entered the school system after independence.

The level of education of all the respondents according to their residential places are as follows:

Table 4.5 Level of Education versus Residential Place

Level of Education	Residential Place			Total
	Uasin Gishu	Machakos	Nairobi	
Never attended school	0	1	0	1
Attended more than one year of primary school	0	3	0	3
Primary school graduate	6	7	0	13
Secondary school graduate	17	21	25	63
Certificate/diploma college graduate	46	41	24	111
University graduate	21	19	21	61
Total Respondents	90	92	70	252

It was established that those who live in urban areas tend to achieve higher education qualifications than those in the rural areas. Those with low education qualifications were found to live in the rural and semi-urban areas; in Uasin Gishu

those who had only managed to finish secondary school were 23; there were 32 in Machakos and 25 in Nairobi. While out of the 70 respondents in Nairobi, 21 of them had a university degree and that represents 30 per cent of the population interviewed in Nairobi. In Machakos, those who had a university degree were 19 out of 91 respondents accounting for about 21 per cent of the total respondents in that area. Those with university degrees in Uasin Gishu were 21 out of 90 respondents interviewed and that represents about 23 per cent. When the respondents from the rural and semi-urban areas were combined, those with university degrees were 40 out of 181 respondents and that accounts for 21 per cent of the population. In that case, those in the urban areas have more access to educational opportunities than those in the rural areas and that explains their average monthly income differences as well. Their incomes therefore depended on their ages, level of education, occupation and their residential places. What they earn determines their disposable incomes and, therefore, their ability to purchase textbooks. However, it should be noted at this point that the general distribution of education qualification in the Kenyan population is not fully reflected in the sampled population. The disparities occur because the target population of the study were mostly teachers and the problems encountered during the study contributed to the selection of more teachers than others in different occupations.

Seventeen respondents had achieved at least a primary school certificate, among them four were in the teaching profession. The number of respondents who had completed secondary school education but did not continue for any other training were 63, and twenty of them were not in the teaching profession. It was also established that sixteen out of 111 respondents who had diplomas or college certificates were not in the teaching profession and out of 61 respondents who had achieved a university degree, 53 of them were teachers.

The level of education of a person tends to determine the amount of money they earn per month but another factor identified in the study was their occupation. Those with college diploma qualifications and above earn more than those with a high school education certificate and below. It was discovered that some non-teachers with a diploma or degree qualifications could have less average monthly

income than a teacher who has college or high school certificates. This could be attributed to the high level of unemployment in Kenya forcing those with higher qualification to take low paid jobs.

4.3 Consumer Incomes

There have been various factors that have affected the wage earnings of ordinary Kenyans. The real wage earnings of the population were decreased by 12 per cent in 1991/92 period due to high inflation.⁵ This decrease was partially caused by the suspension of financial aid to the Kenyan government by IMF and World Bank. The Kenyan currency was devalued and depreciated within that period in the foreign exchange market. Since the price of local paper is pegged on international paper prices that are normally priced in US dollars, its price therefore rose according to the exchange rate (see chapter two, section 2.6) leading to textbook price increases. For the consumers to purchase the books, they should have incomes that enable them to pay the higher price levels of the books.

In this study, it was considered paramount to obtain representation of people who live in different settings and therefore the following were considered; rural, semi-urban and urban areas. As stated in chapter four (section 3.4.3), those living in some part of Uasin Gishu and Machakos districts represent the rural, those living in Eldoret town (part of Uasin Gishu district) and its environs represent the semi-urban and those in Nairobi area represent the urban population. This line of study was taken because it was appreciated that incomes in these areas vary due to the environmental factors prevailing, accessibility of education opportunities and employment opportunities available. The appreciation of the importance of textbooks for their children whether in school or at home was a factor taken into consideration when selecting the respondents in the three categories. The urban and rural population view the role of textbooks in the education of the child differently and more so the provision of them. The rural population's preference is for the government to provide textbooks in schools because they may not have the money to purchase them.

⁵ Kenya. CBS (1993) : *Economic Survey* ; Nairobi, Ministry of Planning and National Development, 5.

The distribution of average monthly income of the respondents are as below.

Table 4.6 Spread of Average Monthly income according to Residential Place

Residential Place	Under Kshs 5000	Kshs 5001 - 7999	Kshs 8000 - 14,999	Over Kshs 15,000	Total
Machakos	18	48	22	1	89
Uasin Gishu	2	24	32	30	88
Nairobi	0	14	28	28	70

This study found out that people living in rural and semi-urban areas have average earnings lower than those who live in urban areas. More than half of the 89 people who were interviewed in Machakos (a rural and ASAL district) who disclosed their average monthly incomes earn less than Kshs 8000.00. This indicates that the majority of people living in this area earn below the government's official poverty threshold income level. Those who earn an average monthly income of below Kshs 8000.00 were 66 in Machakos, 26 in Uasin Gishu and 14 in Nairobi areas. Out of 106 respondents in the three areas who have an average monthly income of below Kshs 8000.00, 92 of them live in the rural and semi-urban areas. This is clearly demonstrated by government statistics that the majority of the poor population live in rural areas (67.6 per cent) while 8.7 per cent live in urban areas.⁶ Those who earn above the government's non-poor threshold of Kshs 8000.00 per month were 23 people in Machakos, 62 in Uasin Gishu and 56 people in Nairobi. Those who have average monthly incomes of above the government's non-poor threshold were 23 per cent of the respondents in Machakos, 69.9 per cent of the respondents in Uasin Gishu and 80 per cent of the respondents in Nairobi. This affirms the government statistics of the income difference between rural and urban population and this affects their purchasing powers.

The tables 5.7 and 5.8 below shows the occupations of respondents their average monthly incomes respectively;

⁶ Kenya. CBS (1998): *Economic Survey* ; Nairobi, Ministry of Planning and National Development, 3.

Table 4.7 Occupations of the Respondents

Occupation	Number
Civil Servant/Administrator	6
Accountant/Banker	4
Secretary	4
Clerk/Office Assistant	6
Librarian/Library Assistant	4
Cook/Cateress	2
Matron/Nurse	2
Air Hostess	1
Salesman	1
University Lecturer	1
Farmer/Peasant Farmer	9
Businessman/Woman	8
Social Worker	2
Mechanic/Artisan	2
Total	52

Out of the 54 respondents who were not in the teaching profession, two of them were not engaged in any employment.

Table 4.8 Average Monthly income versus Occupation

	Average monthly income (Kshs)				Total
	Under 5,000	5,001 - 7,999	8,000 - 14,999	Over 15,000	
Teacher	5	67	74	50	196
Non-teacher	15	19	8	9	51
Total	20	86	82	59	247

The incomes of the population are determined by their occupations. In this study, it was discovered that most of those who are non-teachers and especially farmers, artisans and businessmen/woman who have less education, earn less than those in wage earning employment. However, it was not surprising since they were peasant

farmers and those in business were small business entrepreneurs. The non-teachers were the majority of those who had an average monthly income of under Kshs 5,000. There were twenty respondents who were in this category and fifteen of them were non-teachers. Those respondents who earn over Kshs 15,000 a month were 59 and only nine of them were non-teachers accounting to 15.3 per cent. The teachers who earn over Kshs 15,000 per month are mostly those who teach in secondary schools or senior teachers in primary schools with long experience in the service.

The incomes of the respondents are considered to determine and affect how they use their earnings. Whenever they spend their money, they have to weigh and consider the opportunity costs of what they buy. This does not only affect purchase of textbooks but also other things like reading daily newspapers and possession of media tools like radios and television sets. Though in Kenya, reading a newspaper daily does not imply that one has to buy it, as it was found out that up to ten people share one copy of a daily newspaper. Further to that, it was found out that some people go to the newspapers' vendor stands to read but not to buy the newspapers. Those who read newspapers daily or frequently are more informed and likely to know more about current events than those who read occasionally or do not read them at all.

Those with higher incomes are likely to purchase textbooks more frequently than those who have lower incomes. It was found out in this study that most respondents were of the opinion that they could not afford textbooks because they were expensive. They were of the opinion that primary school textbooks would cost an average of Kshs 100.00 and secondary school textbooks be of an average price of Kshs 200.00. As one of the parents interviewed said;

“school textbooks have become very expensive and my only request to publishers is to make the prices of these books affordable by reducing them.”⁷

Although the average annual income of the population has been increasing, the average increase of textbook prices has been higher (see chapter five, section 5.7).

⁷ Interview with a parent in Machakos district on 15/9/1999.

The average earning per person increased from K£1,837.4 (K£ is a budgetary unit of measure equivalent to Kshs 20.00) per annum (Kshs 3,062 per month) in 1991 to K£2,059.7 per annum (Kshs 3,433 per month) in 1992.⁸ By 1996, the average annual income was K£4,150.1 (Kshs 6,916.8 per month) which increased by 20.6 per cent to K£5,004.6 (Kshs 8,341 per month) in 1997.⁹ The average income difference between 1991 and 1997 was K£3,167.2 (Kshs 5,278.7), this is equivalent to an increase of 172 per cent in the six years. This does not match the level of increase in the prices of textbooks. It is therefore legitimate for the consumers to complain about the high prices of textbooks. The number of textbooks they have in their homes had also a positive relationship with the average monthly income. Those who have an average monthly earning of less than Kshs 8000.00 had fewer books in their homes than those with higher earnings. It is assumed that those with higher incomes can spare some cash to purchase books while those with lower incomes struggle to meet their basic needs (food, clothing and shelter) before thinking of purchasing textbooks (see chapter eight).

The consumers who have higher incomes are more likely to make a purchase of more than one textbook at a given time than those with lower incomes. This study established that people with lower incomes do purchase textbooks that according to their judgement are very necessary for the education of their children. It was found out that parents who are non-teachers and with lower incomes always purchase books after their children have requested and convinced them that those particular titles will increase the chances of the child doing well in school. It was found out that those parents have to seek opinions about the books from someone who is a teacher or any other person they perceive to be more informed about education matters. This shows that some parents are keen to know whether the books they are buying are actually necessary and contribute to the improved educational performance of their children in school. Most people therefore share information about the relevance and availability of textbooks they are told to purchase by their children or school teachers.

⁸ Kenya. CBS (1993) : *Economic Survey* ; Nairobi, Ministry of Planning and National Development, 4.

⁹ Kenya. CBS (1998) : *Economic Survey* ; Nairobi, Ministry of Planning and National Development, 6.

4.4 Textbook Promotion to the Consumers

It is the duty and responsibility of those involved in the textbook industry, be they booksellers or publishers, to make sure that textbook users obtain the right information about the availability and contents of textbooks. It is therefore very important for the consumers to receive information about where the textbooks can be found in the market and if possible their prices. They should be able to know where to get them and the prices they are expected to pay. It is the responsibility of the publishers to spread the information to those potential and actual consumers about their publications. This study has found out that most people do receive information about availability of textbooks through various ways such as window shopping, catalogues and flyers from publishers, posters, newspaper advertisements and including word of mouth. As a parent said;

“I always receive information about where to purchase school books from my children who are told in school to tell us where to buy the books but sometimes I ask other parents.”¹⁰

Though publishers employ sales representatives to visit schools, the study found out that most of the schools visited by these groups are those schools served with good communication networks. A teacher in one of the rural areas said;

“because we rarely see publishers’ sales representatives here in our school we have to travel all the way to town and visit the various bookshops looking for the books we want.”¹¹

The Ministry of Education publishes a list of recommended books (green book) annually and sends it to schools; this list acts as a selection list which teachers and parents use when making decisions on books to be purchased. The problem is that some parents and teachers do not have the information as to where to get these books. Most bookshop shelves in Kenya are not open to the public to browse through them. When customers visit bookshops, they have to ask at the counter if a certain book is available and that is difficult when there are a lot of customers in the shop. It was found out that some of the bookshop attendants are not very much

¹⁰ Interview with a parent in Uasin Gishu district on 25/7/1999

¹¹ Secondary School Teacher during an interview in Machakos district on 14/9/1999.

conversant about all the titles stocked in the shop and it takes a while for them to respond to inquiries from the customers. In some of the bookshops visited by the researcher, there were no books on display for the customers to glance at for themselves to see if the books were available in the shop.

In Kenya, textbooks are marketed in newspapers and consumers can obtain information from such advertisements featured in those newspapers. It is not only publishers who market books in the newspapers, there is one bookshop that advertises textbooks it stocks every beginning of term. The bookshop that advertises most is the Textbook Centre in Nairobi. This bookshop always advertises in the newspaper supplements (back to school) and mails' posters, calendars and other promotional materials to schools. Most teachers interviewed mentioned that they go to the Textbook Centre whenever they want to purchase books - mostly teachers in Nairobi. This therefore helps the publishers in marketing their books. The bookshop does not market books from one publisher but all textbooks that have been recommended by the Ministry.

The publishers have made attempts to use various media of communication to convey the necessary information to the consumers. Publishers have been using posters, calendars, newspapers and exhibitions to reach their consumers. Since over 90 per cent of the respondents had radios in their homes, it is high time publishers explore the use of radio communication to advertise their books. Those with television at their homes were over 73 per cent; advertising books on television can also pay dividends to the publishers.

The information provided by the publishers to consumers seems to some extent to meet the information needs of the consumers. As said before in this study, the channels through which publishers provide information about their books include posters, flyers, calendars and exhibitions. Of the valid respondents, 33 per cent said that the information provided is inadequate but 60 per cent said that the information provided by publishers is adequate.

Though the publishers have been diversifying the ways and means of reaching the readers, their paramount objectives should always be to reach more of their customers and increase the sales of their textbook titles. Other methods which have

opened up to be used by publishers in promoting their books are the book week exhibitions which are normally held in district and area libraries and in school compounds in conjunction with KNLS. In such occasions' school children are invited to participate in reading tents among other activities. In such gatherings the publishers display their titles to those who patronise the exhibitions. The problem though with such exhibitions is that, they are held in major towns making them inaccessible by those who live and teach in rural schools. Teachers in rural schools expressed the wish that such exhibitions could be brought to their nearest shopping centres or schools.

The customers, mostly the teachers get information about books also through the TACs where publishers' sales representatives visit to brief the Tutors who manage the centres about their new and existing titles. It seems though that the publishers' sales representatives who visit schools are more interested in selling their titles than advising teachers on the level of syllabus coverage of their books and those that have been recommended by the Ministry. One of the teachers noted that;

“The publishers and their agents do not give accurate information about the right textbooks that are recommended and should be used in schools, their main purpose when they come here is to sell their books”¹²

It was established in this study that some schools in rural areas do not receive proper information about syllabus changes in good time. They do also not receive information about changes in the titles that are recommended by the Ministry. The case in point was that some teachers were not aware that there has been a new policy on textbook procurement in Kenya. The flow of information from the district education offices to the rural schools is very slow although teachers could obtain the information from their nearest TAC offices.

To conclude this chapter, it should be remembered that for the user and consumers of textbooks to exist, there must be someone who has to produce and distribute the books to them. Apart from the users having the purchasing power, the product itself has to be present. We shall in the coming chapters discuss textbook publishing,

¹² Primary School Teacher, during an interview in Eldoret on 26th July 1999.

profiles of a few selected prominent educational publishing houses and the distribution and supply of textbooks to the users.

CHAPTER FIVE

TEXTBOOK PUBLISHING IN KENYA

5.1 Introduction

Textbook publishing in Kenya accounts for more than eighty per cent of the total book sales in the publishing industry.¹ There are over three hundred institutions in Kenya who have been allocated ISBN numbers by the national library for their production of printed materials. Among these institutions there are close to thirty publishing houses actively involved with educational publishing and these are the institutions whose growth determines the growth of educational publishing (see Appendix 3).

In this chapter, we will examine the growth of the publishing industry in terms of curriculum development, annual growth of book production in the market, carry out case studies of textbooks and consider the methods used in recommending books as core textbooks. During fieldwork trips to Kenya information was collected from various sources including views of experts in the government and the publishing sector. Since the consumers are paramount in this study, the pricing and price changes of the textbooks over period of time will be discussed against the income levels of the consumers.

5.2 Curriculum and Syllabus Development

5.2.1 The Role of the Curriculum Centre

The development of curricula and syllabuses is one of the functions of KIE (referred to as the Institute hereafter), the Curriculum Centre. The development of the school curriculum is continuous as it needs to be reviewed as the needs of the country changes. The Institute develops the curriculum by following a five stage process;

1. Conceptualisation,

¹ Chakava, H. (1996) : Publishing in Africa : One Man's Perspective : Nairobi, EAEP, 17; Makotsi, R. & Nyariki, L. : (1995) : The Book Market in Kenya Today : Nairobi, Dag Hammarskjold, 5.

2. Curriculum designs and syllabuses are prepared,
3. Curriculum materials are developed,
4. Draft materials are piloted in selected educational institutions,
5. Curriculum materials are implemented nationally.

This process is followed in order to obtain maximum input from all the interested parties in the Kenyan education system. However, the five broad stages mentioned above will include assessment of needs, identification of aims, selection of subjects and topics which will meet the needs and aims. It will require also the selection of schools prepared to participate experimentally by piloting learning materials, including textbooks and other learning aids. There will be need for assessment of success in the achievement of the aims identified and re-evaluation of the aims. As one of the directors of the Institute said,

“the people we mostly consult in the process are subject area specialists, teachers, inspectors of schools, religious leaders and representatives of other relevant organisations.”²

When a new curriculum is being developed, the existing education policies are used as baselines by the Institute and this is the start of a new curriculum. New ideas are sought at the conceptualisation stage. Some education policies are formulated as a result of recommendations from an Education Commission or from the Ministry of Education technocrats. During this stage, the objectives of the new curriculum are set. Assessments are carried out by the government by appointing top educationists and may include other interested parties to evaluate the existing curriculum. The review of the existing curriculum will involve the identification of its strengths and weakness. It is during the conceptualisation stage that the difficulties encountered by the learners and implementers in the existing curriculum are determined so as to be avoided in the planned curriculum. At times, the body appointed to carry out the evaluation can be internal or it could be a full scale education commission e.g. Ominde Education Commission of 1964 and Mackay Education Commission of 1981 (see chapter one), to collect information from the general public. The new

² Interview with Mr. O. Kiminza, KIE, Head of Research and Evaluation Division, on 11/8/1998.

curriculum and syllabuses are developed in line to meet the identified goals in the policy.

In the curriculum designs and syllabuses stage, the planning starts with considerations on how the syllabuses will affect the existing education system and other strategies are mapped out. The total cost of the materials and the teaching aids accompanying the textbooks are considered at this stage. The Institute carries out internal evaluations of the developed curriculum designs and syllabuses. This is also the time when they select the schools which are going to be used during the pilot testing and orientations are given to teachers who will be participating in the piloting process.

In the curriculum materials development stage, the private publishing houses involved in educational publishing are given the developed curriculum designs for them to comment and test to see if they can get authors to write books that meet the set subject objectives. When the Institute receives comments from publishers, the curriculum designs and syllabuses are revised. The Institute then develops some materials; that is dummies of pupils' books and teachers' guides ready for the piloting stage. The publishers also start looking for authors who will write the textbooks after they have been pilot tested with the necessary revisions made by the Institute.

During the piloting stage of the drafted materials, the Institute selects schools representing the following school categories; rural, urban, religious and/or missionary, public, private, mixed (boys and girls), single sex, poorly equipped and well equipped schools. The Institute receives feedback from the pilot test and amends the materials accordingly. There is no fixed time or universal number of schools for every subject to be taken in the piloting of the drafted curriculum materials. This depends on a number of factors, as the deputy head of Research Unit said;

“the time taken and number of schools covered in the piloting stage of the curriculum materials depends on the amount of money available and government policy. If the government wants the curriculum to be implemented very quickly, we will

take a shorter time and cover very few schools in the piloting stage.”³

When the pilot testing is being carried out, the publishers continue to develop the textbooks ready for the final changes on the curriculum following what will come out of the piloting. The modified curriculum will be given to the publishers so as to revise their textbooks before printing and publishing them. However, during the change over of the education system in Kenya in 1985 from 7-4-2-3 to 8-4-4, the Institute instead decided to write and publish the textbooks.

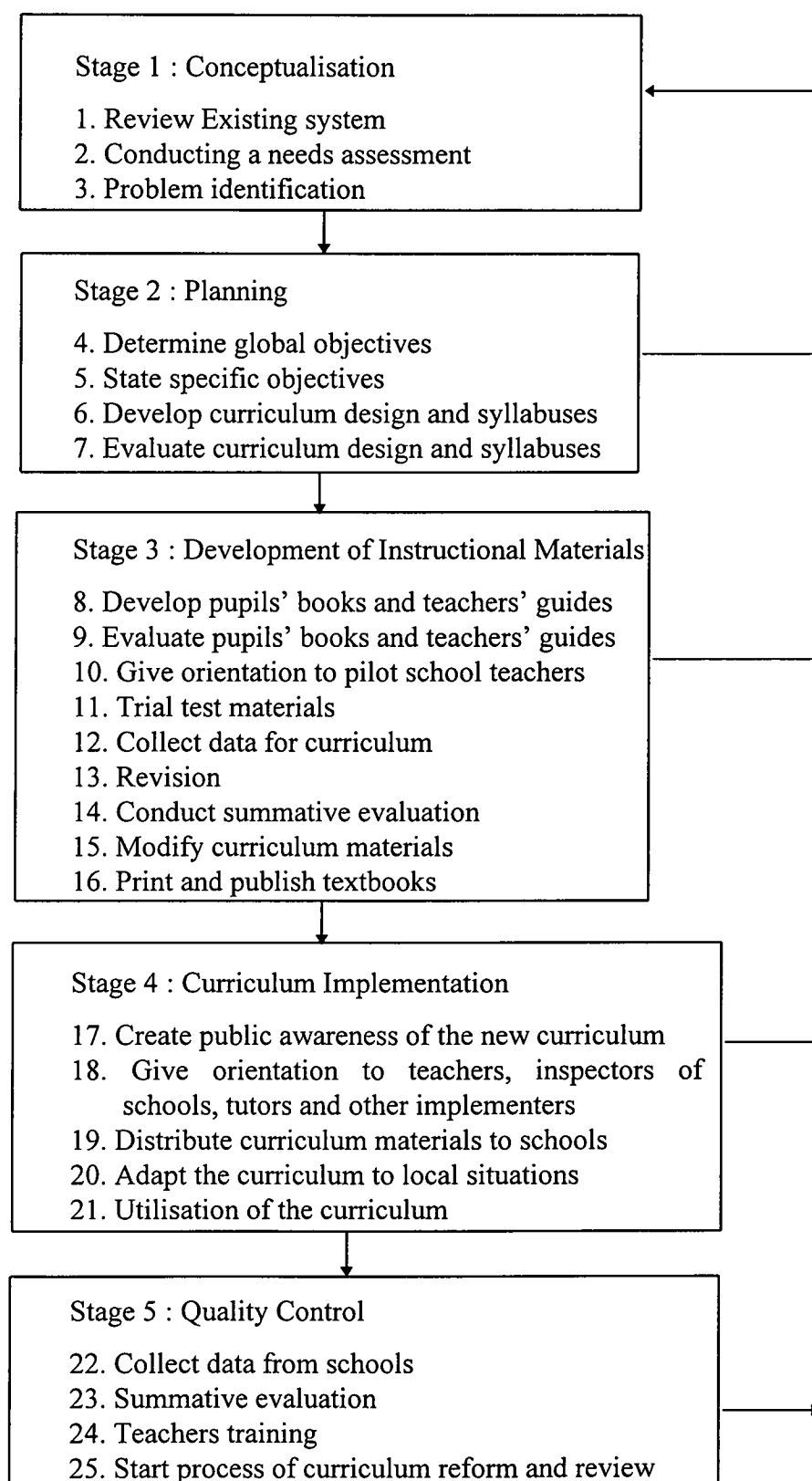
The implementation stage involves releasing the curriculum and syllabus materials to the public. The government can either decide to implement the curriculum nationally or region by region. For example during the change over from Kenya African Primary Examination (KAPE) to Certificate of Primary Education (CPE), the government decided to implement on provincial level.⁴ When the 8-4-4 system of education was implemented, it was done nationally.

After implementation, the Institute continues to offer in-service training to TAC tutors and teachers on the new curriculum. It also carries out evaluation and reviews time and again using feedback from other parties who were not involved in the process of the development. Apart from the monitoring of the implementation, the Institute will be actively involved in the vetting and recommendation of textbooks to be used in the teaching of the new curriculum from private commercial publishers.

³ Interview with Mr. Odhiambo, KIE, Research and Evaluation Division, on 11/8/1998.

⁴ Ibid. (op. cit.)

Figure 5.1 Major Stages in Curriculum Development Cycle used at KIE



Source : KIE files

The growth of education publishing can be illustrated by the way the body charged with the responsibility of curriculum and syllabus development in Kenya has changed over time. Its growth stemmed from a one subject advisory centre (English Special Centre in 1957) to its present day responsibility of being charged with all curriculum development in the Kenyan education system except the university level. The Institute's main objectives are to develop curriculum and curricula materials for all levels of education and training with the exception of the university sector. Its establishment dates back to 1957 when an English Special Centre was set up in order to advise the Ministry of Education on the teaching of English. In 1961 a centre with the responsibility of overseeing and advising the Ministry on the teaching of science was established. The initial KIE established in 1964 had the responsibility of co-ordinating the activities of institutions devoted to teacher training and was in-charge of their examinations. In 1965, a third centre with the responsibility of developing the curriculum and overseeing the implementation of new Mathematics in schools was established. However, the government in 1966 saw the need of establishing curriculum units for other subjects and the three subject centres were joined together to form Curriculum Development and Research Centre (CDRC). In the same year 1966, the CDRC and the initial KIE were merged together to form the present KIE. Other functions were added to KIE including the developing and production of Multimedia Learning Resources in 1976.

At the Institute, curriculum development is undertaken through the use of panel systems; there are both course and subject panels. There are course panels in each level of education and their responsibility is to review the existing curricula, co-ordinate and give guidance to the subject panels, and exchange ideas with other agencies engaged in training of industrial and commercial manpower outside the MOEHRD. The subject panel's responsibilities include: initiating and guiding appropriate curriculum development, projects and research and evaluation in the relevant subject areas, constantly reviewing the existing syllabuses and making recommendations to course panels and reviewing, vetting and recommending textbooks to be used in schools and teachers' colleges in their relevant subject areas.

The course panel is headed by the Chief Inspector of Schools (CIS) and the head of the various subject panels are Inspectors-in-charge of the particular subject. The members of these panels are composed of experienced subject teachers, subject inspectors, teacher training college tutors/lecturers, examination secretaries, representatives of teachers' unions and members from religious organisations.

When selecting members for these panels, the following are considered: professional qualifications, provincial and district representations, gender, contributions by the academic in their local areas and subjects and teaching experiences plus class achievements for teachers.

5.2.2 Government's Role

Publishers agree that the government has a role to play in the regulation and evaluation of textbooks. What they do not want is the government venturing into textbook writing since that could affect its effectiveness as a judge and moderator of textbooks. They think that if the government develops the curriculum and lets publishers develop the books, it will be in a better position to evaluate and vet the books. Chakava's comments could sum up what the publishers thought about government's role in textbook publishing;

“I think the position of KIE as a curriculum development centre can not be questioned. The centre should be there to evaluate the materials that are submitted to them in order to gauge their quality before being distributed to schools.”⁵

The government through the curriculum centre should be informing schools about the new titles which have been submitted by publishers and recommended as textbooks. This can be done effectively through the publication of the recommended list of textbooks in good time, highlighting the characteristics of the new books.

After the publishers have received the revised curriculum, they print their textbook titles and submit them to the Institute to be evaluated and recommended as textbooks if they meet the requirements of the new curriculum and syllabus. It

⁵ Interview with H. Chakava, Managing Director, EAEP, 7th July 1998

should be noted that the examples used and the contents of books should be closely linked to the culture of the users as spelled out in the curriculum. The importance of the examples is crucial. As Altbach said, books provide access to ideas and are particularly crucial where other elements of the mass media, such as television may be limited.⁶ Quality textbooks in content, layout, clarity and design are very important in Kenya for they are the only sources of information available to students apart from the teachers. The ratio of pupils to teachers in Kenya is very high, making it crucial that students should get books which are as good as possible. There used to be a radio programme for schools but it was suspended from 1990 due to lack of finance to cover the cost of broadcasting. With such programmes, pupils all over the country were exposed to the same quality of materials and therefore supplemented what they received from their teachers.

5.3 Authorship

Ideally, many Kenyans can write in English, Kiswahili and many other local languages. In Kenya all the subject textbooks except those for Kiswahili languages and local languages, are written in the English language. The English language is the official medium of instruction in schools for pupils from upper primary and beyond (ages 9 years and above).

Authors are the most important assets of any publishers. The quality of their books rests squarely on the experience and training of the authors. The publishers also have an obligation to look after the authors socially, financially and making them to be part and parcel of the publishing organisation. Apart from that, publishers provide authors with new developments in their subject areas especially on curriculum changes and can therefore revise their books to be more competitive than those from other publishers. In other areas of publishing like general non-fiction and fiction, publishers receive a lot of unsolicited manuscripts, but in textbook publishing, the publishers have to commission authors. As it was said by the Managing Director of EAEP;

⁶ Altbach, P. G. (1992) : *Publishing and Development in the Third World* : London, Hans Zell, 3.

“In educational publishing most of the time we actually go out to look for authors. We are the ones who put the writing team together, we identify the persons to write and we do that sometimes through consultation with the Ministry of Education.”⁷

The publisher gets in touch with the Inspectorate Department in the Ministry of Education to be advised and be given names of teachers or other educationists who have expertise on particular subjects. The publishers will in turn write to the individuals requesting them if they can write a chapter or so of a subject. Apart from using the Ministry of Education some publishers use their own contacts to identify publishers as Muita said;

“Quite often when we think there is an opening somewhere in educational books we approach people we believe are capable of producing the necessary material and give them the task.”⁸

Publishers also do receive a lot of unsolicited manuscripts from enthusiastic potential authors. Such manuscripts are passed through the publishers’ manuscript selection processes and some end up being published. But in most cases, if the work is good but does not meet the publisher’s standards, the authors are invited for discussions before being commissioned by the publishers to write a textbook in the same subject field.

Publishers send their Commissioning Editors to schools whose students have done well in the national examinations. It is believed that those teachers whose students have performed well in a subject are in a better position to write books. The publishers have to maintain their authors by creating a friendly environment. Their welfare has to be taken care of so that they will remain with the publishing firm.

In KLB, most of the manuscripts are unsolicited although there is an aggressive campaign to look for authors. Editors are sent to schools and colleges to identify authors. Other methods used are to get recommendations on teachers who have been participating in curriculum development and national examination marking

⁷ Interview with H. Chakava, Managing Director, EAEP, 7th July 1998

⁸ Interview with D. Muita, Managing Director, Macmillan (Kenya) Publishers, 8th July 1998.

exercises. When their names are received, they are invited to write sample chapters in their subject areas. These sample chapters are sent out to other teachers for comments, and in this way the KLB are able to get other authors depending on the comments those teachers who receive the sample chapters write.

In Kenya, there is still a lack of qualified and experienced writers. Those who are qualified may not be available when needed since they could be engaged in other employments. Most authors of textbooks in Kenya are not in the writing business full-time, but may be teachers, tutors or in any other employment. In situations where there is more than one author, it is difficult at times for publishers to co-ordinate and make a programme which can suit all of them. As one of the publishing managers said;

“We have three authors working on a secondary school textbook, one of them is a university lecturer and since the university semesters has been erratic due to some problems with students, it have been difficult for him to work out a programme which he can meet with the other two [authors]. This has actually distorted the schedule of the book since he is the main person in the team.”⁹

In JKF (referred to as the Foundation hereafter), which is one of the largest educational publishers in Kenya, 98 per cent of their authors are indigenous Kenyans and likewise to KLB and EAEP. The senior editors and subject editors are constantly in touch with the authors. Three of the publishing houses reported that they organise workshops for their authors occasionally to update them on the trend of events and also to exchange views on their writings. During these workshops, authors are given tips on skills like indexing, style, presentations, illustrations and revision of books. These workshops are also used for brainstorming sessions between the editors and the authors. Apart from the workshops, authors in KLB are taken through training sessions on writing and proof-reading skills.

The Foundation gives their authors guidelines on how to write manuscripts. These guidelines outline details on the language, the length and depth and the breadth of

⁹ Interview with J. Githenji, Managing Editor, KLB, 30th June 1998

the different levels of education. EAEP also meets their authors regularly in order to update them on what is happening in the education circulars, in terms of revised syllabus and new rival publications.

Most publishers organise meetings with their authors for interaction purposes. They argue that with frequent communication with their authors, valuable skills and improvements of the manuscripts are discussed. Both the editor and their author can agree on things to be omitted or added to the manuscript.

KLB uses a strategy of bringing together a group of subject specialists to work on one book. They say this makes the work quicker and also improves the quality of the book to the best possible level by encouraging team work. One of the incentives used by publishers such as JKF and others is to make upfront payments to the authors and that will be part of their royalties. In EAEP and Macmillan the authors are sent statements showing how their royalties were calculated with the hope that they will be happy and trust the publishing house. However, most authors in Kenya think that they are being exploited by the publishing firms. They are also allowed to inspect the books on how their titles were sold if they have any doubts about their payments. As Chakava said;

“We pay their royalties in full and are transparent on how the amount has been calculated; we normally invite authors who have doubts on how their royalties were arrived at and when they come, they are shown the bin cards of their book titles that shows the closing stock, numbers given out free, number of copies sold within the period of their royalties and that will be the start of building trust among us and the authors.”¹⁰

Plagiarism is not an uncommon experience in the publishing industry in Kenya, and when it happens it reduces the sales of the affected books. Publishers have to be always on the lookout in order to protect their work and the earnings of their authors. It was found out that Macmillan takes a keen interest in this problem by reviewing titles from other publishers for any pirated work from their books. The

¹⁰ Interview with H. Chakava, Managing Director, EAEP, 7th July 1998.

Managing Director said that one of their authors once reported some of his work appearing in another title without any acknowledgement.

During writing sessions, KLB meets the research and other expenses of authors whenever they convene a meeting. This amount is deducted at the end from the royalties earned annually but the rates given to the authors are also competitive. Most of the publishers pay a royalty of between 10 - 14 per cent on sales while KLB pays a royalty of 20 per cent. When signing the contracts, the authors are explained their rights in detail. Publishers like EAEP appreciate the role played by the authors and establishing a good rapport with them is very important. The authors are made to feel free and to want to be associated with the publishing house always and the managing director of EAEP reckons that with such relationships between the author and the publisher authors will always be retained and others may be attracted both first time authors and well seasoned authors.

The difficulty faced by the majority of publishers is how to maintain their authors, once an author has been published and his/her book becomes successful, they will always demand better returns from the publishers. Authors always think that publishers underpay them while making huge profits from their work. These authors will always want to see the publisher's books and to have their contract adjusted so as to incorporate things that had not been there before. As Chakava said;

“The initial contact with an author is not always difficult but because when an author becomes successful, he/she knows that he/she writes good books and publishers are making money from those books, they become more difficult to deal with. They will negotiate higher royalties, they will scrutinise the contracts you give them and they reject [the contracts] insisting that other things be incorporated.”¹¹

Publishers will always try to pay competitive royalties to their authors so as to retain them. Trust also is another key element which should prevail between the

¹¹ Interview with H. Chakava, Managing Director, EAEP, 7th July 1998

publishers and the authors. Some publishers invite authors to play key roles during launching parties and promotional events of their titles.

It is the belief of a few publishers that when an author has signed a contract, they are bound not to move to other publishing houses. It was reported by two publishing houses that, they will be happy to get authors defecting from their rival publishing houses as they will have experience and be known in the market. General contact with and updating authors about the progress of the books is very important and most publishers in Kenya do exactly that.

Most publishers in Kenya had developed a list of their regular and loyal authors for both textbooks and other areas of publishing with exception of KLB and JKF whose books were mostly authored at KIE by subject panel members. However, the Foundation and KLB have started since to develop a list of their commissioned authors since they started publishing revision textbooks and because of the textbook market liberalisation. It is appreciated by most publishers that in maintaining a list of their authors, it makes it easy to keep in touch and have the first priority to publish the authors' new works. The Foundation and KLB have been relying on textbook manuscripts from KIE; therefore they had very few commissioned authors mostly in other areas of publishing. The two started to develop a roll of their commissioned authors as from 1993 especially for revision textbooks. Most of their commissioned authors started with writing revision textbooks and novels aimed for young readers. In order to get more quality authors, JKF has been organising writers' workshops. These workshops are used to identify and commission authors. Those invited to the workshops are subject teachers from various secondary schools and teacher training colleges across the country.

5.4 Textbook Recommendation

Books which are published with the intention of being used in schools as textbooks by all publishers in Kenya have to be sent to KIE for vetting and consideration before being recommended to schools. The vetting and recommendation task is undertaken by the subject panels who will include technical staff of the Institute. When the publishers have submitted their books, the various panels sit to decide

and categorise the books (this was applicable in the previous system but since the beginning of 1999 all books are recommended if they meet the required standards).

When the books are being assessed, their objectives are assessed against those of the subjects taking into consideration the relevancy and accuracy of the information. The appropriateness of the language used to the age and class of the pupils to use it is considered in the process. Other factors considered are the currency of the information, consistency in writing, the scope and depth covered, the development of the book from the beginning to the end if there is a sequence, the organisation of teachers' and pupils' activities in class and exercises and the general format of the book.

For textbooks meant for low primary school levels, the shape and size of the books are considered when the books are being evaluated and vetted by the subject panels. The use of illustrations, maps and diagrams in proportion to the text and the colours used are very important factors considered by the panels.

Other factors not related to the content are also considered and they include the format, the quality of paper used and the price of the books. It was argued by the head of the research unit at the Institute that the shelf life of the book is very important for primary school textbooks and it is taken very strongly that books for lower primary pupils should be well bound. However, he said that, "there are some publishers who submit textbooks which are well printed and bound with reasonable prices but actually release book copies of different (lower) quality on to the market, hence therefore going round the system."¹²

Before the introduction of liberalisation in the textbook market, publishers were not levied a fee for vetting their books at the Institute. Most of the books which were in the core textbook list were those which had been developed and authored by the subject panels (also responsible for vetting other books) at the Institute. There were genuine fears from other publishers that the system was not working in an impartial manner. The institute now levies a fee on the publishers whenever they submit their books and they will receive a written report about the books stating the reasons for

¹² Interview with Mr. O. Kiminza, KIE, Head of Research and Evaluation Division, on 11/8/1998.

recommendation of their books or otherwise. Reports like this were not available before the liberalisation of the textbook market.

5.5 Number of Textbooks Published

Table 5.1: Textbooks Published 1987 - 1995

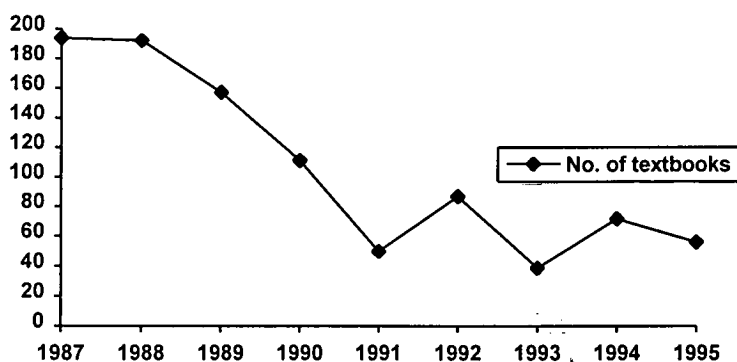
	000	100	200	300	400	500	600	700	800	900	Total
1987	0	0	5	19	29	47	30	20	9	35	194
1988	0	0	15	14	35	37	41	6	13	31	192
1989	0	0	18	17	44	30	18	4	2	24	157
1990	0	0	18	4	26	22	11	12	0	18	111
1991	0	0	3	3	14	9	8	2	4	7	50
1992	0	0	6	10	21	18	10	12	4	6	87
1993	0	0	3	6	8	7	5	1	4	5	39
1994	0	0	1	6	15	11	17	9	1	12	72
1995	0	0	1	5	20	13	5	6	1	5	56
Total	0	0	70	84	212	194	145	72	38	143	958

Key

000 - Generalities 100 - Philosophy 200 - Religion 300 - Social Sc.
 400 - Philology 500 - Pure Sciences 600 - Applied Sc. 700 - Arts
 800 - Literature 900 - Geography and History

Sources: Author's own compilations and Kenya National Bibliography

Figure 5.2: Textbooks Published 1987 - 1995



Sources: Author's own compilations and Kenya National Bibliography

The number of textbooks published in Kenya has been in a decline for some time in the 1990s. This could be attributed to the growth and state of the overall economy in the country. This reflects what happened in individual publishing houses, for

example in 1991, KLB managed to publish a total of 11 new titles and also experienced approximately a 10 per cent drop in sales turnover as compared to 1990.¹³

As seen on Figure 5.2, there has been a steady decline in number of new textbook titles in Kenya since 1987 with the lowest being in 1993. This reflects the overall performance of the economy. Between 1990 and 1993 there were a lot of difficulties in the country, ranging from political evolution to near economic crisis. This was the period when there was political change from one party rule to multi-partyism, the IMF and World Bank also had frozen financial aid to Kenya and there was the flotation of the local currency in the money market among other economic adjustments.

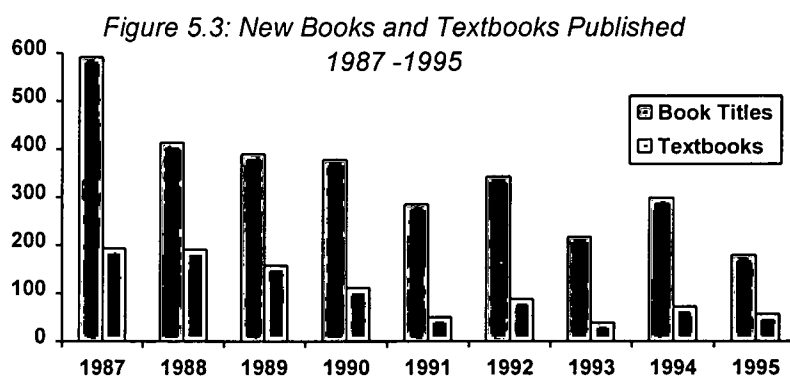
The number of new titles in all other publishing sectors which were published between 1987 and 1995 has been in decline as well, as reflected on table 5.2. These statistics were obtained from the KNB which is published annually by KNLS based on the titles deposited by the publishers in line with the legal depository regulations. However, it was discovered during the study that some publishers do not submit their depository copies to the library as required. One of the major concerns with the publishers was that the KNLS had not been up to date on the publication of the KNB. But due to lack of qualified personnel in the national public library, there was a period when the publication of KNB had been delayed, but it has resumed and by August 1999, it was almost up to date. The number of new titles of all books as compared to new textbook titles was as follows;

¹³ Kenya. Ministry of Education (1991) : *Ministry of Education Annual Report 1991* :Nairobi, Ministry of Education, 49.

Table 5.2 New Book and Textbook Titles Published 1987 -1995

Year	All new book titles	Textbooks	Textbooks as per cent of total number of books
1987	591	194	32.8
1988	413	192	46.5
1989	389	157	40.7
1990	377	111	29.5
1991	285	50	17.5
1992	342	87	25.4
1993	217	39	18.0
1994	298	72	24.2
1995	179	56	31.3

Source: Author's own compilation and KNB



Source: Author's own compilation and KNB

5.6 Pricing and Textbook Prices

The prices of textbooks in Kenya vary considerably. This is due to their physical size, number of pages, the type of paper used, colour use and the pricing policies of the publishing firms.

The pricing methods used by the different publishers vary considerably. The mark-up method is the most commonly used method. However, some use a multiplying factor to arrive at the cover price of their titles. One of the publishers uses a multiplying factor of 2.7 on the unit cost so as to derive the cover price. The

multiplying factor will take care of the profits, the discounts and other overhead costs associated with the production of the book.

The major factor that affects the prices of textbooks in Kenya is paper (see chapter two). Paper accounts for more than 60 per cent of the production cost of books. Though there is a local paper manufacturer in Kenya, publishers still complain that the price of paper is expensive. The prices of paper are pegged on international paper prices;

“The only complaint about the local paper I have is the pricing of it. I think the pricing of Webuye paper is pegged on international paper prices.”¹⁴

The actual problem with the fluctuation of price of the local paper in Kenya is that the pricing of it is based on the US dollar. When the Kenya shilling (local currency) fluctuated on the exchange rate market, the paper prices follow the trend. This has been a factor that has affected the prices of textbooks as well.

The majority of publishers in Kenya do not have their printing presses with an exception of two, that is KLB and JKF. Publishers therefore, do not stock paper and their textbook prices will depend on what charges the printers will quote at the time for the printing services.

The prices of textbooks have constantly increased while the incomes of the customers have decreased in real terms over time. The real wage earning of the population was decreased by 12 per cent in 1991/92 period due to high inflation rates.¹⁵ This was partially caused by suspension of foreign aid by donors and the political instability of changing from a one party system to multi-party system. This also led to the depreciation of the Kenya shilling in the foreign exchange market.

¹⁴ Interview with H. Chakava, Managing Director, EAEP, 7th July 1998

¹⁵ Kenya, CBS (1993) : *Economic Survey 1993* : Nairobi, Ministry of Planning and National Development, 3.

5.7 Case Studies of Textbooks

In this study, eight textbooks from six publishing houses had been earmarked for case studies. In the field one publishing house did not co-operate with the researcher in allowing their selected title to be studied. There was also one publishing house who allowed the researcher to include their books in the study but could not allow the researcher to get statistical information and the past history of the books. The selected books in this study are three primary school textbooks (first three on the list) and four secondary school textbooks. The books are;

Primary Mathematics Pupils' Book 4,

Primary Art and Craft standard six,

Masomo ya Msingi Kitabu cha 7,

Secondary Home Science Form 1,

Certificate Geography Form 2,

Secondary Commerce students 3 and

God Meets us: CRE Form 4 (see table 5.8).

5.7.1 Primary Mathematics Pupils' Book 4

This book was initially developed by KIE for pupils in standard four in primary schools (age 9 years). The book was authored by primary school Mathematics subject panel members at the KIE headquarters. Then the manuscript was passed on to JKF for publication. The writers authored all the title series from standard one to eight (pupils book 1 - 8).

The book was first published in 1983, between the first date of publication and 1995, it was reprinted ten times. The reprints of the old edition were in 1985, 1986, 1987, 1988, 1989, 1990, 1991, 1993, 1994 and 1995. The number of copies printed in the old edition were not available because of the way records are filed in the organisation, although we were able to approximate using sales figures which were available. In 1996, the book was revised which resulted in the new edition which

has been reprinted in 1997 and 1998. The print-runs of both editions were as follows;

Table 5.3 Number of Copies Printed 1985 - 1998 (Primary Mathematics Pupils' Book 4)

Year	Copies
1985	80,520
1986	85,010
1987	110,600
1988	97,050
1989	90,800
1990	95,100
1991	98,700
1993	120,020
1994	124,090
1995	150,870
1996	161,368
1997	148,486
1998	151,720

Source: Publisher's Title file

The number of printed copies of this book is high because it is the only book in the market and faces almost nil competition. The sales also of the book are high since when the government started a project to purchase textbooks for schools in ASAL and POP areas (see chapter eight), one of the core subjects targeted was mathematics and titles from JKF and KLB were purchased. This particular titles was among the titles selected and purchased.

In the file of this book title, there were comments received by the publisher from the users. One of the users had complained about the shallowness on the coverage of the topics and another complained about the arrangements of the topics in the book. When the researcher sought comments from the editor about these complaints it was discovered that these particular users who forwarded their

complaints were using the book as a syllabus guideline. The complaint about the lack of in-depth coverage was genuine and it was about the old edition of the book and not the new edition. There was another user who had commented on the way the book had been bound. The earlier edition of the book was done on perfect binding (the edge of the book is cut and glue applied when putting the cover). The user said the binding was not appropriate for books used by children for they get torn apart easily. This comment was appreciated by the publisher and in the new edition the binding has been changed and the various sections of the book are sewn together by use of thread before gluing them together.

Pricing

In JKF, prices of books are determined by multiplying the cost by a factor of 2.7. The price of Mathematics book four was Kshs 23.00 in 1990, this had arisen to Kshs 186.00 in 1997. The price has never changed between 1997 and 1999. Within the seven year period the price change was Kshs 163.00 approximately 709 per cent, which is a big change indeed. By all standards, no one can expect that the consumer income could change at such a rate unless under an economic situation with a hyper-inflation rate. In Kenya such an inflation rate had never occurred before. Though there has been big change in the foreign exchange market where the local currency has lost a lot of value against the hard currencies notably the British pound and the US dollar, the increase does not match the price increase (see chapter two).

Vetting of Textbooks

Since this book was originally authored by the curriculum centre, there was no need for it to be forwarded for vetting. Since its publication, the book has been revised but not taken to KIE for vetting. The book has been enjoying a monopoly in the market as the only officially recommended textbook until the introduction of liberalisation in the textbook market in 1999.

5.7.2 Primary Art and Craft Standard Six

Primary Art and Craft standard six is published by Macmillan Publishers with a target audience of primary class six pupils (11 year old). It is a third title in a series

of five titles in a series, ranging from standard four to standard eight. This book was first published in 1991 after the publisher commissioned the authors. The initial idea of publishing this book had been mooted by the publishing house's editorial staff after recognising that there was a lack of subject textbooks in the field. They identified the authors by way of prior knowledge about their specialities. The two authors commissioned to write the book were selected because of their expertise in the field. The two authors were S. Njagi and A. Berluti.

Berluti had been an Art and Craft teacher/lecturer in a teachers' college (Kigali Teachers Training College) before and was seen to be an authority in the subject field. After teaching he was transferred to KIE to be one of the Directors in-charge of the subject curriculum and syllabus development. On the other hand his co-author Njagi had vast experience in the subject field for he was a school teacher before being appointed to be a manager in the School Equipment Production Unit (SEPU). SEPU is a department in the Ministry of Education charged with the responsibility of designing and producing teaching aids for schools in collaboration with KIE. Njagi was a manager at the time when the publisher commissioned him to write the book.

In the file of this book, it was indicated that by January 1990, one of the authors had submitted his work while the other had not. When both authors had submitted their works, the full manuscript was sent to the readers whom the publisher prefer to call advisors. The manuscript was later returned to the authors for revisions. When the publisher was satisfied with the revisions, the book was co-published with Macmillan UK.

Since its first publication date, with a print-run of 3,010 copies, the total print-run by 1999 was 20,249. According to the records made available by the publisher, the total number of copies sold by August 1999 were over 19,000 over a period of nine years. The book was reprinted in 1992 (twice), 1994, 1995, 1996 (twice) and 1999. The number of copies printed were as follows;

Table 5.4 Number of Copies Printed 1991 - 1999 (Primary Art and Craft Standard Six)

Year	Copies
1991	3010
1992	2931
1992	3060
1994	3020
1995	2107
1996	3106
1996	2480
1999	535

Source: Publisher's Title file

The publisher avoids printing a lot of copies whenever she runs a reprint. The paramount reason for this was lack of storage space and according to what can be sold within a year. According to the views of the publisher, if they continue to print basing on the market demands they will avoid tying-up their investments on stock of books.

Although the publisher had commissioned the two authors, in the file of the book in question, there were communications with other prospective un-commissioned authors who had delivered their manuscripts. There were two authors whose manuscripts had been turned down by the publisher because they had already commissioned the authors.

This study found out that the publisher sent out the manuscript to three readers before publication. The three fall in the categories of one each from KIE, a practising teacher and Ministry of Education official. According to the editor, these people have different roles to play as Ngang'a said,

"You know when we send the manuscript to these people we expect the teacher to comment about the practicality of the book in class, the KIE fellow will comment on the adherence to the set curriculum and syllabus and the Ministry of Education official will tell us

whether the examples and other materials in the book are politically correct.”¹⁶

After the publisher has received these comments, they reconcile them and take the book to the press.

Pricing

The general rule of pricing in this company is based on the cost of the inputs and addition of a certain percentage as mark-up to cover the overhead costs. The price of the book when it was first published in 1991 was Kshs 80.00. The price had risen to Kshs 200 in 1995 and by 1999 the price had increased to Kshs 325.00 an increased of Kshs 245.00 between 1991 and 1999. The price increase between 1991 and 1995 was Kshs 120.00 which is equivalent to an increase of 150 per cent. And between 1995 and 1999 the price difference was Kshs 125 which was an increase of 62.5 per cent. The overall price difference in percentage in the eight years was a jump of 306.3 per cent, which outstripped by far the average income increase of ordinary Kenyans in the same period (see chapter four, section 4.3). The consumer income by all standards could not increase at such a rate. It should be noted also that other economic factors like the inflation rates, the exchange rates on foreign currency against the local currency and cost of inputs had a role to play in the price increase.

Vetting of Textbooks

The government requires that all publishers submit their new published textbooks to KIE for consideration and recommendation. The textbook vetting panel which consists of practising teachers, educational officials, religious leaders and KIE staff meet to consider if the submitted books meet the syllabuses set. It is required that all books to be considered must reach the KIE offices by end of May each year if they have to be considered in that particular year. The book was published and sent to KIE to be vetted in 1992 and has not been sent for re-evaluation since. The textbook vetting panel normally meets in July every year to consider all the books which have been submitted by the publishers.

¹⁶ Interview with David Ngang’a, Editor Macmillan (Kenya) Publisher on 10 August 1999

This book has never been sent to KIE for further vetting since 1992, because it has been the only Art and Craft textbook in the market. It has monopolised the market and the publisher has spent very little or nothing on marketing at all. After the introduction of market liberalisation in the textbook market in 1999, there has been one publisher who has published a title in the same subject area.

With the book dominating the market, the publisher did not see any reason for it to be reviewed in newspapers or magazines. It is also common with all textbooks that are in the government's recommended list not to be advertised or marketed in any way. The only form of marketing was in their price lists or catalogues which are mailed to schools and Education officials. However, this trend is to change after the opening up of the textbook market.

5.7.3 Masomo ya Msingi Kitabu cha 7

This title is published by EAEP and the publishing house did not provide the researcher with the necessary information about the history of the title. The Editorial manager informed the researcher that since the company was preparing their end of year results, they could not get time to be interviewed but were willing for their book to be included in the case studied books. The old edition of this title was published in 1986 and a new edition was published in 1999. This book is a Kiswahili language textbook aimed for primary school class seven pupils (12 years old).

The publishing house commissioned authors who are experienced teachers in the subject. The authors of the first edition were T. Zani and Z. Zani, who have had great experience in teaching Kiswahili language and long experience in the teaching profession. The new edition was revised by Z. Zani, M. Makombo, A. Vonyoli, J. Mwayani and M. Waweru. This new edition is more elaborate than the previous edition; it provides more activities for the students, has more pages and more illustrations. It covers the topics in depth and provides more definitions of unfamiliar words to the students.

The same authors have revised all the other title series from book one to book eight which had been written by the two authors. This title is very popular with teachers in the areas visited as they claim to be covering the syllabus in-depth.

Pricing

The method of pricing used by EAEP is the total cost of book divided by the number of copies and added a certain percentage of mark-up and this will give them the selling price of the book. The price of the book (old edition) in 1996 was Kshs 145.00 and when the new edition was published it was selling at Kshs 260.00. The price change within the three years is Kshs 125.00, although the change could also reflect the changes in the new edition. However, the consumers were paying 86.2 per cent higher for the new edition in 1999. This increase would have a great impact on the spending of the consumers as their income increases could not match such a huge increase.

Vetting of the book

Since the researcher, could not obtain information from the publisher, it was difficult to ascertain when the book was forwarded to KIE for vetting and if there has been any other vetting and evaluation done since its inclusion on the recommended list. The book however is in the list of recommended textbooks to be used in schools as class textbooks.

5.7.4 Secondary Home Sciences Form 1 Pupils' Book

The title was first published by KLB in 1987 after it was authored by members of the secondary school Home science subject panel. The target audience of the book are students who are in their first year of secondary school (age 14 years old). The Institute invited teachers, college tutors and Ministry of Education officials to write the book. There were nine authors involved in the writing of this title, there were four secondary school teachers, two teachers' college tutors, one polytechnic lecturer, one Ministry of Education official and one other from the Institute.

The manuscript was written and passed over to KLB for publication. This particular title is the first title of a four title series book for secondary school home sciences students (form one to four). The book was published in 1987, and

immediately in the following year the book was revised since it was discovered that it had a number of errors and mistakes. When the manuscript was delivered to KLB by KIE, the publishers were under pressure from the government to publish the book as soon as possible since there were no other book titles recommended for use in the school classrooms. The publisher therefore published the book without the editorial team having time to edit the manuscript. The government required them to typeset and take it straight to the printing press. When it was being revised, there were no great changes on the text for it did not concern the reduction or rearrangement of the topics but some corrections of typographical errors and some factual information errors.

The title has been reprinted six times since the publication of the revised edition, that is 1989, 1990, 1993, 1994 and 1997 (twice). The number of print-runs since the first edition are as follows;

Table 5.5 Number of Printed Copies 1987 - 1997 (Secondary Home Sciences Form 1 Pupils' Book)

Year	Copies
1987	2,685
1988	18,222
1989	11,510
1990	8,530
1993	19,870
1994	5,096
1997	10,800
1997	5,533

Source: Publisher's Title file

This particular title competes with other home science titles from other publishers, however it has been dominating the market before the liberalisation of the textbook market. It has been the core textbook used in all the schools that have chosen to teach home sciences to their students. The subject is not compulsory in all schools

in the country since it requires equipment that might not be present in some schools especially those in the rural areas.

The publisher has received comments about the book from the users commenting about the coverage of syllabuses and some topics they think were omitted. In the title file, those who had written such letters have always been getting replies from the publisher assuring them that the topics not covered are not necessary since the book covers what is required in the curriculum and that their comments are appreciated.

Pricing

The method used when the price of this title was determined was in line with the pricing policy of KLB. The unit cost is determined and a percentage (mark-up) is added to it to achieve the selling price. The percentage added to the unit cost should always cover the profits, overhead costs and the royalty payable to the authors. For this particular title, there were no royalties to be paid but a one off payment was made to the writers through KIE as an honorarium to those who contributed in the writing process.

The price of this book when it was published in 1987 was Kshs 80.00 and the prices had risen to Kshs 120 by 1998 and there was no change of price in 1999. The price difference since its publication was Kshs 40.00 which is equivalent to a 50 per cent increase. This is a modest increase by all standards, but we have to take into consideration that this was written by the Ministry and there was no royalty payable. Apart from that the publisher has been receiving subsidies from the government to as late as 1994/95 financial year through salary payment of the staff at the Bureau.

Vetting of the Book

Since the book was authored at the Institute it is not subjected to vetting and evaluation. After its publication in 1987, some copies of the book were sent to KIE and that resulted in it being revised in 1988 since there were some errors and mistakes that KIE was needed to clarify before any other print-run was considered. This has been the only time when copies of this title has been forwarded to KIE.

This title has been dominant in the market and there has been very little marketing done for it. Apart from it being listed in the publisher's catalogues and displays in exhibitions, there is no money directly spent in promoting it to the customers.

5.7.5 Certificate Geography Form 2

Certificate geography form 2 was published in 1993 for students in their second year (ages 15 years) of their secondary school education by OUP. It is the second title in a series of four textbook titles starting from form one to form four. The publisher commissioned the two authors of this title to write all the titles in the series. The initial idea was mooted at the publishing house by the editorial team when they saw that there was a gap in the market to be filled. In the process of searching for an author, one of the authors of this book delivered an unsolicited secondary school geography manuscript. When the editorial team had read through the manuscript, they found it to be good but out of focus on what they had in their proposals. They invited the author of the manuscript for discussions and since they wanted a textbook as soon as possible, they requested him to look for someone to team up with and write secondary school geography series.

The person who had delivered the unsolicited manuscript was Karuggah who was a geography teacher in a secondary school by then. After the publication of the title series he was promoted to be an high school headmaster. He identified another high school geography teacher to team up with in the writing of the book. The co-author identified was Kubasu who was a geography teacher at Alliance Girls high school. Her class had done very well in the national examinations and she had participated a number of times in the national examination marking exercises.

They took approximately four months after they had been briefed by the editorial team to deliver their first draft of the manuscript which was mailed to three readers to comment about it. When the publisher received the comments from readers, the authors and the editorial team discussed it, and the authors were given time to make the amendments before the book was finally published.

Since its publication and recommendation as meeting the objectives of the curriculum, the publisher has been receiving comments from the users. One of the

users, a secondary school geography teacher, had written commenting about missing topics in the book. It was found out that the topics missing mentioned by the user were covered in the next title (form three) in the series. It seems the user was not aware that the curriculum centre revised the syllabuses in 1992 and some topics were rearranged. The publisher suspects that since the teacher who wrote, teaches in one of the schools in the rural areas, there are chances that he has been using the old syllabus guidelines. The problem always with rural schools in Kenya is that they get some information about syllabus changes very late, especially if there are slight changes.

Since its first publication, the book has not been revised but has been reprinted twice in 1995 and 1997. The publisher was preparing to revise it as it is anticipated that the curriculum might be changed after the year 2000. An education commission of inquiry was in progress (see chapter one) and publishers were anticipating that one of its recommendation will be changes in the curriculum. The print-runs of the book are as below;

Table 5.6 Number of Copies Printed 1993 - 1997 (Certificate Geography Form 2)

Year	Copies
1993	2000
1995	2500
1997	3000

Source: Publisher's title file

The print-runs of this book were low since there are other geography titles competing with it in the market and was not the main textbook used in schools. Geography as a subject also in secondary schools is not compulsory and not all the schools teach the subject in their schools.

Pricing

The method used in the pricing of this book was as per the company's pricing policy. Their pricing policy is the unit cost of the book multiplied by a factor (which the publisher was not keen to reveal); this will give the selling price of the book. When the book was first published in 1993, the price was Kshs 250.00 and

by 1998 it had risen to Kshs 330.00. In 1999, the book was being sold at Kshs 398.00. The price had increased by Kshs 80.00 between 1993 and 1998, that was an equivalent of 32 per cent increase within five years. By 1999, the price increase from the initial price was Kshs 148.00 which is equivalent to a 59.2 per cent increase in six years. The price increase is modest if compared to price increases of other publishing firms but nevertheless the price is still very high for most Kenyans.

Vetting of the textbook

The title was submitted to KIE for vetting in the same year it was published. The book was recommended as one of the books which meets the objectives of the curriculum and therefore could be used by students in schools. This was however not recommended as a core class textbook, but since in secondary schools, the schools have freedom to choose the main textbook, some schools may use it as their main book in class while others may not.

5.7.6 Secondary Commerce Students' book 3

The book was first published in 1991 after JKF received the manuscript from KIE. This title is the first of a two title series aimed for students in secondary school years three and four. The publishing house did not play any role during the writing of the book in terms of advising the authors.

The book was being revised in 1999 and JKF (the publishing firm) had identified those who were to carry out the task. KIE and Ministry of Education personnel were included in the revision process. There were six people who were involved in the revision process. During the revision process, apart from the changes in syllabus, the revisers were to look at the changes in the economic and social background in the country. There was need also to check some facts which were not correct in the old edition.

In the file of this title, the study uncovered that there were communications between the users and the publisher. Notably, some teachers and students had written inquiring about missing topics. When the senior editor was asked about this, he informed the researcher that teachers had been using the book as if it was a

syllabus guide book. Some of the letters had however praised the book as very good and detailed in the coverage of the syllabus and mentioned the missing topics. It was however found out later that the missing topics were to be covered in the book four of the same series since the syllabus had changed. Some teachers seems to have not received the revised syllabuses and were using the old syllabus guides.

The number of print-runs of this title were as follows;

Table 5.7 Number of Printed Copies 1996 - 1997 (Secondary Commerce Students Book 3)

Year	Copies
1996	6820
1997	4500

Source: Publisher's Title file

Its print-run is characteristically low since this particular subject is not a compulsory subject in secondary schools. It is one of the subjects in business studies in secondary schools. It was found out during the research that this particular title was very popular with the teachers teaching the subject but it was in short supply in most of the areas visited. The book was not in stock in the bookshops visited, it was not available in all the bookshops in Eldoret town; even the JKF depot had run out of stock of the title. In Nairobi, it was available in one main bookshop - the Textbook Centre and the JKF warehouse while it was also not available in the four bookshops in Machakos. There seems to have been some delays in the printing of the new edition of the books which resulted in the shortages in the market.

Pricing

The method of pricing of this particular title was in line with the pricing policy of the publishing house. When this particular title was first published in 1991, it was priced at Kshs 49.00 and by 1997 its price was Kshs 178.00 and the price had not changed in 1999 as per their catalogues. The price difference in the seven years

was Kshs 129.00 an increase over 263 per cent. This estimates to have been an average price rise of 38 per cent every year in last seven years.

Vetting of the Book

Since this title was authored at the Institute by the subject panel, there was no need for it to be taken back for vetting. It was recommended as a core textbook by the Ministry of Education. There were other titles which were published by other publishers but it was the main title in the market which had been recommended.

5.7.7 God Meets us: CRE Form 4

This title was published in 1986 by EAEP for students in their fourth and final year of secondary school. This is a Christian Religious Education (CRE) textbook authored by R. Kerre who has been a teacher for a long time. The author has taught CRE for more than ten years in two separate high schools.

This title was revised by the author in 1993, so as to include the changes in the curriculum and also to bring up to date examples used in the book. The book has been reprinted four times since it was revised in 1993, the reprints were in 1995, 1996, 1997 and 1998. This particular title is very popular with secondary school teachers as they say it is the best among the other available titles in the market. This title has four title series but with different authors for each title. The publisher commissioned the authors to write the titles.

Pricing

The price of this title in 1996 was Kshs 240.00 and by 1999 the price had increased to Kshs 310.00. The price difference within the three years was Kshs 70.00 which is equivalent to 29.2 per cent. This was a modest increase as compared to other price changes of other textbooks in the market. However, a price of more than Kshs 300.00 is high enough to cause a huge effect on the purchasing power of the customers. As per what the consumer thought to be a fair price for secondary school book was Kshs 250.00, meaning that is what they can afford to spend on a single title.

Vetting of the book

Since the researcher could not interview the editorial manager or any other staff of the publishing firm for information about the book, it was difficult to tell when the book was first recommended and whether it has been sent back to KIE for re-evaluation. However, this title is one of the textbooks recommended as meeting the set syllabuses and is used in schools as class textbook.

Table 5.8 Case Studied Textbooks at Glance

Title	Primary Mathematics Pupils' Book 4	Primary Art & Craft standard 6	Masomo ya Msingi Kitabu cha 7	Secondary Home Science Form 1 Pupils' Book	Certificate Geography Form 2	Secondary Commerce students 3	God Meets us: CRE Form 4
Author(s)	KIE Panel members; J. Indimuli, R. K. Ndung'u, M. Matsigulu, P. Mugo	S. Njagi & A. Berluti	Z. M. Zani, H. Mkombo, A. Vonyoli, J. Mwanyani, M. Waweru	KIE Panel Members; C. Kimalat, , S. Othieno, E. Gateri, M. Ngare, J. Okudo, C. Mugo, V. Odero, M. Onyango, R. Nguchu	R. Karuggah, J. Kubasu	KIE Panel Members; G. O. Nyakembo, A. Shisia, M. Wainaina, D. J. Muya, O. Nyamu, J. Indire	R. Kerre
Publisher	JKF	Macmillan	EAEP	KLB	OUP	JKF	EAEP
First publication date	1983 (new edition 1996)	1991	1986 (new edition 1999)	1987	1993	1991	1989
Number of pages (text)	158	130	165	121	155	196	181
Size (mm)/ Format	249 X 177 Portrait	179 X 245 Landscape	249 X 177 Portrait	208 X 148 Portrait	249 X175 Portrait	249 X 177 Portrait	210 X 148 Portrait

Price (1999)	Kshs 186.00	Kshs 325.00	Kshs 260.00	Kshs 120.00	Kshs 398.00	Kshs 178.00	Kshs 310.00
Level of audience	Primary, class 4	Primary, class 6	Primary, class 7	Secondary, year 1	Secondary, year 2	Secondary, year 3	Secondary, year 4
Number of series	8	5	8	4	4	2	4
Illustrations	Black and white illustrations (drawings) Two colour illustrations (drawings)	Black and white illustrations (drawings) Black and white photographs Colour photographs	Two colour illustrations (drawings), Map	Black and white illustrations (drawings)	Maps, Black and white illustrations (drawings), black and white photographs	Black and white illustrations (drawings)	No illustrations
Exercises and questions	Class examples framed, all others are activities for the pupils in class and home works in 12 units, unit one is revisions and unit 14 is supplementary and mixed exercises covering all the units covered in the book	Two or more exercise activities for pupils in each of the sixteen chapters	At least one exercise in each of the 36 units in 3 chapters	Exercise activities for students at end of each chapter, some activities are home work or group work	At least one exercise in each chapter, some multiple choice questions	Learning activities and exercises at the end of each chapter	Questions for students after a few chapters in the exercises (to write essays)

Number of columns	1	2	1	1	2	1	1
Glossary	Nil	Yes	Nil	Nil	Nil	Nil	Nil
Bibliography	Nil	Nil	Nil	Nil	Nil	Nil	Yes

CHAPTER SIX

THE PROFILES OF SELECTED EDUCATIONAL PUBLISHING FIRMS

6.1 Introduction

In this chapter, the profiles of selected publishing houses will be discussed. These publishing houses are Jomo Kenyatta Foundation (JKF), Oxford University Press (OUP), Kenya Literature Bureau (KLB) and East African Educational Publishers (EAEP). The discussion will cover their historical background, management structure, statistics of books and textbooks they have published over a period of time, textbook prices, printing and distribution methods of textbooks. These selected publishers are the largest educational publishers in the private commercial and parastatal publishing sector. KLB and JKF are the parastatal publishing houses while OUP is a multi-national publishing house and EAEP is private commercial indigenous publishing house.

The information about the publishing houses was a result of interviews which were carried out in field trips to Kenya in August/September 1997, June/September 1998 and June/September 1999. The researcher interviewed personnel in Editorial, Production, Marketing and the top management of the publishing houses discussed and of a number of other publishing houses in Kenya which were sampled (see chapter three for details).

It is estimated that a little over 50 per cent of the textbooks recommended by the Ministry of Education and used in schools are published by the four named publishing houses.¹ Apart from these publishing houses, there are other firms dealing with educational publishing. Other houses with a sizeable presence in the market and recommended by the MOEHRD include Longhorn, Macmillan and Phoenix. Apart from class textbooks, which are vetted and recommended by KIE, there are revision books that do not go through the recommendation process. Such books are very popular with teachers and pupils/students who are preparing for

¹ In a list of recommended textbooks released by the government in 1999 with over 1000 titles, over 500 textbook titles on it were published by these publishing firms.

national examinations at their end year of study in a level. Apart from the mainstream educational publishers other houses who concentrate on such books are Dhillon Publishers and Shirikisho.

6.2 Jomo Kenyatta Foundation

6.2.1 Introduction

The researcher carried out interviews with the managers of JKF during the field trips to Kenya at the premises of the organisation. This information therefore is based on interviews with the Senior Editor (Deputy Publishing Manager), Assistant Sales and Marketing Manager and the Production Manager. Apart from the interviews, the researcher also used information from internal files (documents) of the organisation which contained unpublished information. The information is also based on observations which were carried out during the visits to the organisation.

JKF is one of the two state-owned publishing houses. It has established itself as a leading primary school textbook publisher over the years when it used to have a monopoly of some textbook titles authored by the KIE. They have been publishing manuscripts developed at KIE which were recommended as core textbooks for schools before the liberalisation of the textbook market in late 1998 and becoming effective at the beginning of 1999. The Foundation was established in 1966 through an Act of Parliament as a company limited by guarantee and without any share capital.

During its establishment period, it had wide ranging and idealistic objectives. These objectives included; to print and publish any newspapers, periodicals, books, or leaflets; to improve the condition of health, education, general vocational training and the cultural attainment of the nationals of East Africa; to create and maintain high standards of professional qualifications in school teachers and technicians; to establish and maintain training institutions in East Africa for persons above school age desirous of becoming teachers or technicians; to manufacture, buy, sell, supply and deal in provision and goods of all kinds required by the poor; to establish,

support and aid in the establishment of and other charitable organisations.² It was to use its profits in aiding the disadvantaged by offering scholarships to children from the poor who had excelled in their educational performance.

From the objectives above, when JKF was established it was to cover almost everything conceivable as needed by the poor. It can also be said such grant objectives could have been motivated by the need by the leaders to Africanise most institutions. With limited financial and personnel resources, all the objectives could not be achieved and, therefore, they have been narrowed down to the publishing, printing and supplying of educational books. It has also continued to offer scholarships to bright students from economically disadvantaged groups.

JKF's concentration of publishing also came as a result of the domination of the textbook market by the foreign publishing houses in the early days of independent Kenya. The political leaders (the government) therefore decided that it was prudent to have textbooks locally produced which reflect the cultural heritage of the country. The books which were published at JKF were those developed at the curriculum centre.

In 1998 the Foundation recorded a turnover of Kshs 392.7 million (UK£ 3.927 million). This was a rise of Kshs 3 million (UK£ 0.03 million) from the previous year when they had registered a turnover of Kshs 389.7 million (UK£ 3.897 million). The Foundation had a staff establishment of 243 employees including those who are working in the sales depots.

6.2.2 Management Structures

The management of JKF is headed by a managing director who is a presidential appointee and answerable to a Board of Directors appointed by the government. This is in line with the Parastatal Act in Kenya that requires that, the heads of parastatals to be appointed by the government. The day to day activities of the Foundation are undertaken within the six departments namely Audit, Sales and Marketing, Finance, Production, Personnel and Editorial.

² Kenya. Ministry of Education : *Education in Kenya: Information Handbook* : Nairobi, JKF, 1987, 101 - 105

Our interest in this organisation is the publishing activities undertaken. This therefore draws our attention to the three departments that directly deal with publications of textbooks. These departments are Editorial, Production and Sales and Marketing departments.

The Editorial department in this institution has the responsibility of preparing and processing manuscripts for publication. It is in this department that any unsolicited manuscripts are evaluated before any action is taken. When the manuscripts are received, and before any decision is made on whether they are publishable or not, they are sent to readers, usually three in number. This is to ensure that such unsolicited manuscripts are fully evaluated and a variety of comments are received.

The editorial team in the Foundation occasionally organises workshops where they invite a number of people from the education field. In such events, they are able to select and commission authors. The list of people to be invited are selected on the basis of educational qualification, teaching experiences, participation in the curriculum development activities, participation in national examination marking exercise and views from the school inspectorate division in the MOEHRD. As the senior editor said;

“when looking for authors, we rely on a number of factors: one we consider those who are teaching because we are an educational publisher, second we rely on people who participate in curriculum development activities and examination markings and at times we contact the school inspectorate department and KIE to get information about teachers who are good in certain subjects.”³

Like other publishing houses, the Foundation also makes use of their sales representatives in the field to visit schools and contact teachers who might be later commissioned to write books. It is clear also that a lot of networking is used when searching for authors by involving those in the curriculum centre and Ministry of education and the publishers.

³ Interview with Mr. S. Karani, Senior Editor, JKF, on 1/7/1998

After receiving and accepting the manuscripts, the subject editors will work with the authors in the preparation of the manuscript for publication. The editorial staff will work on editing, designing, typesetting, illustrations and preparing the costing and budgeting for the publication of the book. The editorial staff therefore liaise with the accounts, production and the sales and marketing departments.

The editorial staff liaise with the authors in preparation of the contracts and negotiations about their royalties including how they are going to be paid. When authors have been commissioned, it is the responsibility of the subject editors to send a guide for authors booklet, detailing the house writing style. It is the editorial department that deals with issues of book revision. It is the editorial department that determines when a textbook is to be revised because of a change in curriculum or information received from the field after market research done by the sales representatives. The subject editors have to get in touch with authors in order to arrange for the revision of their books.

The Foundation is equipped with computers which are used in the editorial department. Most of the manuscripts are typeset and layouts done in the house. However, there are some manuscripts which are contracted to professional typesetters when there is a lot of work in the organisation. However, in most publishing houses, typesetting work is outsourced. There are artists also in the editorial department who do illustration work and designs of book covers using the computers and the appropriate software programmes.

The production department is headed by a production manager. In this department, responsibilities start with the purchases and stocking of the consumables used in the film and plate-making and those in the printing press section. The foundation has its own studios where films (both positive and negatives) are developed, and plate making is carried on. Colour separation for colour work is done in the foundation's premises although they are sometimes contracted to professional colour separation companies in town when dealing with jobs of higher quality. When the plates are ready, they are taken for printing in the printing press section which is owned by the foundation. All the printing and finishing work is done by the production department. The finished books are packaged and stored in the

central warehouses before they are despatched to the various depots run by the sales and marketing department.

When the printing of textbooks are done in-house, the staff are in a position to monitor the process and also control the cost and quality. This will also enable them to plan the printing of their book to coincide with periods when books are needed in the market which leads to savings on storage space.

The Foundation has a sales and marketing department which has the responsibility of marketing, promoting and distributing the company's products. The sales and marketing department is headed by a marketing manager. In the Foundation, this department liaises with the production, editorial and the accounts departments. The Marketing department provides the editorial department with the information collected by the sales representatives on the books needed in the market and how their books are doing in the competitive market place. This Marketing department also provides the production department with sales figures and books still in stock so as to plan for reprints and the quantity of books to be released from the central warehouse. The sales department collates the stocks from the various depots in the country and assesses the number of copies sold in a given period in order to provide the production department the number of copies needed for printing. However, the marketing operation in the Foundation is relatively new since they used to sell books which were authored at the curriculum centre and recommended by the MOEHRD and therefore had a guaranteed market. Textbook market liberalisation has therefore had a great impact on the operations of JKF and a number of adjustments and realignment in the sales and marketing department were needed to be made.

Like other publishing houses, the sales and marketing department of the Foundation is a link between the publishing house and its customers who are bookshops and book wholesalers. The sales and marketing departments gets in touch with these groups of people who will then sell their books to the end users. It is in the sales and marketing department that determines those who can get credit and the mode of payment. The sales and marketing department also has the responsibility of collecting the debts from the company's debtors who are mostly

bookshop and book distributors. The Foundation rarely sells books directly to end users. However, unlike other publishing houses, it operates depots where individual customers can purchase their books on exceptional occasions (when a textbook title is not available in the nearby bookshops). In most cases the individual customers are referred to the nearest bookshop to buy their books.

6.2.3 Published Subject Areas

JKF publishes manuscripts from both KIE and from individuals and joint authors. It sometimes commissions authors to write manuscripts. This only happens in areas that they see have a demand in the market, mostly on subjects not covered by KIE. In its backlist, there are titles of educational, university education level, fiction and general books. They have published titles in the following subject areas for primary education; Art and Craft, Christian Religious Education (CRE), English language, GHC, Mathematics, and Physical Education. In the secondary education, they have titles in the following subject areas; Accounting, Commerce, Economics, English Language and Literature, Fasihi (Kiswahili literature), Geography, Mathematics, and Office Practice. Apart from publishing core class textbooks, they have a number of revision textbooks in these subject areas they have published.

The table below shows the total number of new titles published by the Foundation in all fields of publishing.

Table 6.1 : New Book Titles Published by JKF 1987 - 1998

	Total
1987	10
1988	9
1989	6
1990	17
1991	3
1992	10
1993	12
1994	8
1995	11
1996	7
1997	1
1998	6

Source: Provided by the publishing house

The number of new published titles at the Foundation has been fluctuating since 1987. There were some years when they published dismal numbers like in 1991 and 1997. In 1991, the economy in the country was depressed (as stated in chapter two) and therefore there was less economic activities. In 1997, the Foundation was concentrating more on revising their existing textbooks. They revised most of their textbook titles which had not been revised since first published between 1983 and 1987 therefore they spared very little time to develop new titles. It was established that in 1990, sixteen out of seventeen new titles were textbooks and in 1996 the scenario was the same when the new titles were four textbooks and three children fiction novels.

With poor records management in the organisation which was almost universal with other publishing houses in Kenya, it was difficult to obtain statistics of new publications of years beyond the most recent decade. The researcher was able to obtain statistics of new publications from 1987 with some difficulties.

6.2.4 Textbook Prices

When pricing textbooks, the Foundation uses a multiplier to determine the selling price of the textbooks. The prices of textbooks in the Foundation have been increasing like in other publishing houses. The prices of some textbooks in the Foundation have increased by over 300 per cent between 1991 and 1992. The most affected books are primary school textbooks of which one title had increased by over 412 per cent over the same period of time. One of the clear contributing factors to the price increases of prices of textbooks was the devaluation and depreciation of the Kenyan currency in the early part of 1990's. This in effect lead to high inflation rates in 1991/1993 and high prices of paper and other essential product for book production. The price increase was not confined to JKF alone but was common to other publishing houses.

In 1999, the lowest price of a primary school textbook was Kshs 70.00 and the most expensive primary school textbook was Kshs 250.00. But, as compared to prices of textbooks from other publishing houses, their prices were competitive. Prices of secondary school textbooks were more expensive than those of primary schools. The cheapest textbook for secondary schools was Kshs 156.00 while the most expensive was Kshs 390.00. Their secondary school textbook prices was also competitively priced as compared to those from other publishing houses. The competitiveness of their prices could be attributed to three factors, first some of their books were authored by KIE and therefore they do not pay any royalty on their sales, second, they buy their paper directly from PPM hence bypassing the middlemen who would have added some cost and not receive the generous discounts and finally they mostly print their books in-house.

6.2.5 Printing of Textbooks

The greater number of textbooks in JKF are printed in-house. The Foundation has its own printing machines which are under the management of the production department. The Foundation has cameras and plate-making equipment including an automatic film processing machine. However, during peak periods, the organisation tenders out to some commercial printing presses. The printers mostly used are English Press and Pizone Printers.

Since the publishing house owns a printing press, it purchases printing paper directly from PPM and, therefore, avoids buying from paper dealers at higher prices. Unlike other publishers, if they wish to, they can control their printing costs and make the prices of their textbooks lower. When they purchase their printing paper from PPM, they are given a trade discount of 25 per cent of the factory price. However, if they purchase from the Paper Dealers they will purchase at ex-factory prices and they may not be given any discount.

6.2.6 Distribution

In the distribution area, the Foundation could be said to be achieving its objective of distributing educational books all over the nation. It has ten depots in major towns. The depots are in the following towns, Eldoret, Kakamega, Karatina, Kisii, Kisumu, Machakos, Meru, Mombasa, Nairobi (Kijabe Street) and Nakuru (see appendix 2). These depots receive books from the central warehouse at the publishing premises. They have their own trucks which are used in transporting the books to these depots. From the depots, the Foundation is able to serve the neighbouring bookshops and schools and, therefore, reducing the transportation cost of their customers. Their policy is to direct school orders to bookshops whom they will supply their books to. This gives a pragmatic approach to book distribution.

The sales representatives make visits to schools, bookshops and also to education offices. When bookshops order books, they are given a 25 per cent sales discount on the cover price. Booksellers who are based in Nairobi and the surrounding areas are given free transportation to their premises. Unfortunately booksellers who have their businesses in the upcountry have to meet the transportation costs from the Foundation's depots to their business premises.

They promote their books through posters, calendars, print media and the sales representatives. The aggressive nature of marketing adopted by the Foundation is due to the increasing competition by the private commercial publishers after the market liberalisation.

6.3 Kenya Literature Bureau

6.3.1 Introduction

The information about KLB was collected during the fieldwork periods in Kenya. It was a combination of interviews, observation and documentary evidences which were accessed at the organisation's premises. The researcher interviewed the Publishing Manager, Marketing Manager, Assistant Marketing Manager, Chief Editor and Science subject Editor. The interviews were carried out at the premises of KLB. The researcher was also taken round the premises to see what the organisation was doing and how the various departments liaise with each other. The documents used in the research include internal documents (files) and annual reports.

The history of KLB stretches back to 1947 when East Africa Literature Bureau (EALB) was established to serve East African countries - Kenya, Tanzania (Tanganyika and Zanzibar) and Uganda. When the East African Community collapsed in 1977, the assets of EALB were shared among the nations. This led to the establishment of KLB (hereafter refer it as the Bureau) through an Act of Parliament in 1980.

The Bill was passed in Parliament in 1982 and the Bureau was made a department in the Ministry of Education and the salaries of the staff came from the treasury. It was not fully operational until 1989 when it employed part of its staff and paid their salary. Some of its staff were still paid by the treasury through the ministry of Education.

When the Bureau was enacted in the Act of parliament, it carried on some of the objectives of EALB but some had to be made specific to Kenyan situations. Some of the objectives include; carrying out the business of publishing, printing and distributing a variety of books, periodicals, journals and magazines; acquiring copyrights and other rights and licenses of literary works; promoting through appropriate government agencies the production of low-cost books and making them available for distribution throughout the country; promoting, encouraging and assisting Kenyan authors through financial incentives and making available for

general readership works of interest and value to the public through translations from foreign to local languages. Concerning financial incentives, it was confirmed by the publishing manager when he said;

“when we have identified an author or authors, and commissioned them to write a book, they are normally invited to the Bureau for briefing sessions with the editors and on such occasions they are given money to cover their travelling expenses, and also subsistence allowances which are not deducted from their royalties which in other publishing houses will be deducted.”⁴

The Bureau has gone a long way in attempting to meet its objectives. They not only engage in educational publishing but also general publishing as stipulated in their objectives. By using their printing presses the Bureau have been able to offer textbooks at low prices as compared to other publishing houses. However, in publishing and printing of periodicals, journals and magazines, there has been little activity and therefore the objective has not been achieved by the bureau. In promoting and assisting Kenyan authors, the bureau is assisting a number of authors and by paying them higher royalties, it is an incentive. The bureau has also been in the forefront by encouraging local authors in writing science textbooks for secondary schools which other publishing houses have not attempted to do.

In 1998, the KLB recorded a turn over of Kshs 382.8 million (UK£ 3.828 million) an increase of Kshs 12.1 million (UK£ 0.121 million) from the previous financial year. The organisation had a staff establishment of 233 employees in 1998.

6.3.2 Management Structures

KLB has five departments namely Accounts, Editorial, Marketing, Personnel and Production departments. These departments are headed by managers and the overall institution is headed by a Managing director who is appointed by the government. Like JKF, it has a board of directors who are appointed by the government since it is a parastatal.

⁴ Interview with J. Githenji, Publishing Manager, KLB on 30/6/1998.

The editorial department is headed by a publishing manager. In this department the responsibilities include liaising with authors, both commissioned and non-commissioned. When the manuscripts have been received and assessed and accepted for publishing, the process of developing them into a publication (book) is started. The typesetting, preparation of artwork and illustrations and composing are prepared in-house.

The Bureau has its own staff who use computers in the editorial department to typeset the manuscripts. Apart from the typesetting work, illustrations and layouts are undertaken in the institution. Unlike other publishing houses all the editorial processes are undertaken in the bureau. However, when there is a lot of work some typesetting work are normally contracted to some professional typesetters in town.

The Authors work with the subject editors during the editorial process of their works. When the works have been typeset into camera-ready stage, they are delivered to the production department for the next stage of production. The production of books in Kenya still goes through the processes of the preparation of films and metal printing plates which are development in bath basins (exposing films and plates and develop them by putting basins containing developing chemicals). In most developed countries, new technologies are used in the printing of books and can cut costs and time in the printing processes, this advanced technologies is not widely used in Kenya.

The Marketing department in KLB deals with the marketing and sales of the company's books within and outside the country by taking part in national and international book exhibitions and other promotional activities. Other functions include conducting market research (using the sales representatives), preparing sales forecasts, negotiating with book distributors.

The sales department liaises with other departments and is in close communication with marketing, editorial, production and accounts department. The sharing of information between the various departments makes sure that the publishing activities in the organisation are synchronised for its growth.

6.3.3 Published Subject Areas

It publishes manuscripts from KIE and individual or joint authors. Authors can be either commissioned or authors send in unsolicited manuscripts especially fiction and general titles. The commissioned authors are mostly for revision series titles for both primary and secondary schools. The commissioning is done after a market research has been undertaken to see if there is a gap or demand in the market.

KLB has been publishing manuscripts authored at KIE for textbooks but also accepts manuscripts from individual authors and joint authorship whether unsolicited or commissioned. The subject areas published by the Bureau for primary school level are Agriculture, Business Education, GHC, Home Sciences, Kiswahili and Sciences. For secondary school level, the following subject areas are published; Agriculture, Biology and Biological Sciences, Business Education, English Literature set books, Geography, History and Government, Home Science, Industrial Education, Islamic Religious Education, Kiswahili, Mathematics, Physics, Physical Education and Social Education and Ethics. In each year, there is an average of ten new titles in total published which represents a very low percentage of the number of the manuscripts received by the publishing house. Nearly half of these are educational titles. Apart from publishing textbooks, there are revision titles published by KLB in the subject areas within their province.

KLB also publishes titles for the tertiary level of education and for the general readers. They also publish titles in the local languages for adult education and for pre-school level. The table below presents the total number of published titles in KLB in all areas they publish.

Table 6.2 New Book Titles Published by KLB 1987 - 1998

	Number
1987	13
1988	9
1989	14
1990	15
1991	10
1992	9
1993	7
1994	8
1995	8
1996	13
1997	7
1998	14

Source: Provided by the publishing house

The number of new titles published by the bureau has been between 14 and 7 titles yearly between 1987 and 1998. The majority of these new titles has been textbooks followed by fiction books for children.

6.3.4 Textbook Prices

The pricing of textbooks and other books in the Bureau is based on the inputs and determined by a mark-up. Their prices are competitive in the market as they try to keep their prices low in fulfilling their objective of making prices affordable to most of the Kenyan population. The prices of textbooks in 1999 ranged from Kshs 52.00 for an Agriculture primary school textbook to Kshs 420.00 for a Drawing and Design textbook for secondary school students. They have kept prices low as the Publishing Manager said;

“we have an added advantage over other publishing houses, for we print our textbooks in-house with our printing press, we print in large quantities to enjoy economies of scale which lowers the unit cost.”⁵

⁵ Ibid.

The prices of textbooks at the Bureau have been on the increase as in other publishing houses. For Primary school textbooks there has been an increase of up to 400 per cent between 1991 and 1999. For the secondary school textbooks the increase in price between 1991 and 1999 has been up to 380 per cent.

6.3.5 Printing of Textbooks

KLB has its own printing press under the production department. When the editorial department has designed and typeset the books they are forwarded to the production department for film making and plate making before being printed.

In the printing press section, the Bureau has a number of printing machines including small Heidelberg GTO's KOR series machines like those in JKF and Wohlenberg-Moz two colour printing machine.

However, the Bureau also at times uses commercial printers like English Press to print their books when there is a lot of work. Their printing press is not only meant for printing their own textbooks but they also print other service jobs like printing of stationery documents for other companies.

6.3.6 Distribution

The marketing strategy employed by this company is through sales representatives who make visits to schools. They also print posters and catalogues which are distributed or mailed to schools especially those in areas like North Eastern and some parts of Eastern and Rift Valley provinces.

The sales representatives visit schools and bookshops to promote and market the books. When they get orders from schools, they inform them to collect from the nearest bookshops. These sales representatives will make visits to the bookshops to assess how many copies of the ordered titles are available. In order to make sure that their books are in most parts of the country, KLB identifies bookshops in district towns and assesses their creditworthiness. As the marketing manager said;

“we have identified bookshops in some towns in remote districts to whom we extend credit facilities; but their creditworthiness has to be

assessed first, using them we can distribute our books widely to most areas of the country.”⁶

The company offers a discount of 25 per cent to all booksellers regardless of where they are based. Customers within the Nairobi area are given free delivery to their business premises. For those based outside Nairobi, their orders are delivered free to the premises of transporters in Nairobi. The transporters mostly used are Roy Parcel Service, Akamba Transporters and Overnight Express.

KLB has divided the country into five regions for the purpose of their book selling. In each area, they have a sales representative; the areas are Central, Coast, Mt. Kenya, North Rift and Nyanza region. Prior to 1989, KLB had employed book salesmen who were using trucks to sell books to schools and bookshops in the field. This method was found to be cumbersome and expensive, it was therefore abandoned and sales representative were employed.

6.4 Oxford University Press

6.4.1 Introduction

The information about OUP was collected during two interview sessions with the Regional Marketing Manager and the Editorial Manager. Apart from the interviews, documentary evidence was also used in the process of collecting the information. The task was carried out at the premises of OUP in Nairobi during the fieldwork trips in June/September 1998 and July/August 1999.

Oxford University Press is one of the multi-national publishing companies still in operation in Kenya. Its operations dates back to 1952 when a sales office was opened in Kenya. It deals mostly with reference books (dictionaries and atlases), although it has sizeable number of textbook titles.

When the local branch was established its major function was to look for quality manuscripts and channel them to London for publication. During its first years of operation, most of the manuscripts were those prepared by the curriculum centre. There were two major course books which they published after they were

⁶ Interview with J. Muraya, Marketing Manager, KLB on 30/6/1998.

developed by the curriculum centre. These were: *A New (Oxford) English Course for Schools*, later changed to *New Peak English Course* and the *Progressive Peak English Course*, both published in the mid 1960s.⁷ These two titles are still in the market and were revised in 1998 by the KIE staff and the OUP's editorial staff. The links between the curriculum centre and OUP therefore have not been cut as they still publish these book titles.

In 1998 OUP had a turnover of Kshs 227.5 million (UK£ 2.275 million). It had a staff establishment of 62 employees in Kenya.

6.4.2 Management Structures

OUP has five departments namely Publishing, Trade and Distribution, Marketing, Administration and Finance. The overall organisation is headed by a regional Managing director in-charge of the Eastern Africa region.

The publishing department is headed by a publishing manager. The responsibility of the publishing department includes all the works of commissioning and liaison with the authors. The other responsibility of the publishing department is to negotiate with the authors on their royalties and signing of contracts. There are subject editors in the department who are in-charge of the various subjects published by OUP and they commission as well as revise the existing titles. In OUP most of the typesetting work is done within the organisation, although some editorial work is, at times, contracted to freelance editors. In such cases it is the responsibility of the relevant subject editor to make sure that quality of the work matches the standards of the publishing organisation.

Since OUP does not have its printing press, all its printing work is done by commercial printing firms in Kenya and those in other countries. The editorial team liaise with the printing firms who have successfully quoted a competitive price for printing the work. The editors invite quotations from a number of printing firms and compares their prices.

The Trade and Distribution department is headed by a Trade and Distribution manager. The responsibilities of this department include the managing of the

⁷ Chakava, H. (1984) : *Books and Reading in Kenya* : Paris, Unesco, 9.

warehouse of the company in Nairobi. They receive the printed books from the printers and maintain the records of the stocks. OUP has its own warehouse in Nairobi where it sells its books to bookshops and appointed book distributors in the country. This department liaises with the marketing department which receives customer orders. When the marketing department receives orders, it passes them to Trade and Distribution department for processing and dispatching to the customers.

The Marketing department is headed by a regional Marketing Manager who is in-charge of all the marketing activities of OUP Eastern Africa region with offices in Dar-es-salaam and Kampala. The responsibilities of the marketing department is promotion and marketing and market research. In this department, there are Sales representatives who visit customers in the field and forward their findings to their respective offices. Apart from promoting and selling their books, they also scout for would be authors in the schools they visit. The marketing department works closely with the Publishing, Trade and Distribution and the Finance departments.

6.4.3 Published Subject Areas

It publishes textbooks for primary and secondary schools as well as the tertiary level of education and general titles. Its authors are KIE and other joint or individual authors. The subject areas published for primary schools are; Agriculture, Business Education, Christian Religious Education, English Language, Lugha ya Kiswahili (language), Mathematics, Music and Science. For secondary school level the following subjects are published; Agriculture, Chemistry, Christian Religious Education, Economics, English Language, English Literature, Geography, History, Home Science, Industrial Education, Fasihi ya Kiswahili (Literature), Lugha ya Kiswahili (language), Mathematics and Physics. Though it commissions its authors for textbooks, the organisation receives a number of unsolicited manuscripts. They do their market research before commissioning authors. This is to ascertain whether there is a gap and a market opportunity for the books.

Apart from publishing class textbooks OUP also has a number of revision textbooks in the subject areas they are publishing. They have also a number of

reference titles: Atlases, dictionaries and encyclopaedias. Below are the number of new titles published at OUP.

Table 6.3 New Book Titles Published by OUP 1987 - 1998

	Number
1987	29
1988	30
1989	35
1990	14
1991	32
1992	23
1993	16
1994	12
1995	9
1996	13
1997	11
1998	12

Source: Provided by the Publishing House

The majority of the new books published in OUP yearly are textbooks and fiction novels.

6.4.4 Textbook Prices

Like other publishing houses, OUP textbook prices are based on mark-ups. However, when pricing their books, they have to take into consideration the prices of other competing titles in the market. For instance before they publish a textbook, they check what is available in the market by assessing the contents and the prices. The sales representatives in the market will also report on the selling prices of the textbooks in the market and with the full information, they will be able to price their books competitively. In some books, to break-even takes a long period and that is one of the considerations which is considered by the company when pricing their books.

The average price of textbooks published by OUP can be said to be more expensive as compared to those published by other publishing houses. This is all due to the number of print-runs (lower print-runs on average, e.g. 3,000 copies and below) ordered by the publishing house which puts the unit cost of production high. In 1999, the lowest price of a primary school English textbook was Kshs 66.00 and the highest was costing Kshs 399.00 (a primary English textbook). The secondary school textbooks are more expensive, the cheapest costing Kshs 275.00 (Home Science textbook) and the highly priced costing Kshs 510.00 being an Economics textbook.

6.4.5 Printing of Textbooks

OUP does not have its own printing press, so they rely on local printers to print their books. However, in some cases, they print some of their books in countries like Singapore and Mauritius. When printing locally, the printing firms used include English Press, Fotoform, Interface, Acme, Colourprint, Majestic among other local printing firms. When making a choice on which printing firm to be used, their quotations and ability to deliver the work in time, is considered.

6.4.6 Distribution

Textbooks distribution by OUP is through their own trade and distribution department. Orders taken by the sales representatives from schools are directed to bookshops who will get in touch with the marketing department. The marketing department will in turn forward the orders to the distribution department to fulfil the orders after the bookshops have made arrangements on how they are going to make the payments. All bookshops are given a 25 per cent trade discount. When the bookshops have placed their orders OUP transports the books to their business premises with their own trucks and lorries. With the textbook market liberalisation, most of the textbooks which were recommended as supplementary textbooks by KIE will be competing with those which had been on the list as core textbooks on equal footing. OUP has been spending a lot of energies in marketing their textbooks to the consumers and they will be no problems in adjusting to the textbook liberalised market.

In summary, OUP has a strong dominance in reference book publishing in Kenya. They have continued to excel in publishing of dictionaries and other reference books which are used in all levels of education. Their other major speciality is the English textbooks and revision books they have in the market which are very popular with the teachers and pupils.

6.5 East African Educational Publishers

6.5.1 Introduction

The information about EAEP was collected through interviews with the management staff of the publishing house. The staff interviewed were the Managing Director, Publishing Manager and the Sales and Marketing Manager. The interviews were carried out during the August/September 1997 and June/September 1998 fieldwork trips to Kenya.

East African Educational Publishers (EAEP) is one of the major indigenous commercial publishing houses in Kenya. It has a long history spanning from 1968 when it was established as Heinemann Educational Books (East Africa). Prior to 1968, Heinemann (UK) had a representative in Kenya by the name Heinemann and Cassell Ltd with the responsibility of marketing school books (mostly to European schools). The publishing house was initially preoccupied with selling imported secondary school textbooks until the early 1970s. Primary school textbook publishing started with the development and publishing of a Kiswahili textbook in 1978. However, local publishing was undertaken in the publishing house in 1972 after the management of the branch was put under local management.

The publishing house has gone through various transformations from Heinemann (as a multi-national) to the present EAEP (an indigenous publishing house). In 1986, Heinemann (UK) sold off 26 per cent of their shares to local Kenyans and the firm was named Heinemann Kenya. The British firm still had majority shares in the company which were reduced by another 40 per cent in 1990 when Heinemann (UK) sold them to local Kenyans. Heinemann (UK) sold off their remaining 34 per cent of the shares to local Kenyans in 1992 and that is when the name was changed to EAEP. The company was operating in Kenya as a branch of Heinemann (UK)

until when it was bought by indigenous Kenyans and changed the name to EAEP. It has now become one of the successful educational publishers in Kenya and also supplies books to other countries in East and Central Africa region including Uganda, Tanzania, Southern Sudan, Rwanda and Burundi.

In 1998, EAEP registered a turnover of Kshs 406 million (UK£ 4.06 million), making it the publisher with the highest turnover in Kenya. In the same year, the staff establishment was 44 employees. Although this organisation have fewer employees than the other three publishing houses, their efficiency and productivity is higher. It all depends on the organisation and professional dealings and the market size coverage.

6.5.2 Management Structures

EAEP has five departments namely Publishing, Production, Sales and Marketing, Warehousing and Finance. The institution is headed by a Managing Director who is the chief executive of the company. Each of the departments is headed by a director.

The publishing department has the responsibility of co-ordinating all the editorial projects and liaising with the authors. This department receives all the unsolicited manuscripts and evaluates them before making any decision whether to publish them or not. The editorial team also develops publishing proposals and commissions authors to write the books. When editorial department have completed their editorial work, they pass on the manuscripts to the production department who will invite printing quotations from local printers.

The production department oversees the printing and delivery of the printed work to their warehouse. When the production staff receive work from the editorial department, they invite quotation from printers and give the work to the printer who has quoted the lowest and also can prove to do the work to the standard required.

Sales and Marketing department is responsible for the marketing and promotion of the books both in Kenya and the neighbouring countries. There are sales representatives who have been posted to the eight provinces in Kenya with an

exception of North Eastern Province. However, Rift Valley Province has two sales representatives due to its size.

EAEP has a warehousing department which is in-charge of the company's warehouses and the distribution company (EAEP has a subsidiary distribution company; East African Educational Book Distribution). Its responsibility is to make contacts with the book distributors and supply them with the books when they need them. The department also maintains the records of the stock of books. It liaises with the finance and sales and marketing departments.

6.5.3 Published Subject Areas

It publishes educational, university, general and fiction books. Since its establishment, it has a backlist of over 1000 titles. The following are the subject areas published for primary school; Agriculture, Art and Craft, Business Education, English Language, English Literature set books, GHC, Home Sciences, Lugha ya Kiswahili (language), Mathematics, Music, Mother Tongue books, Physical Education, Christian Religious Education and Science.

In secondary school textbook publishing, they have titles in the following subject areas; Agriculture, Biological Sciences, Business Education, Chemistry, Christian Religious Education, English Language, Geography, History and the Government, Home Sciences, Lugha ya Kiswahili (language), Mathematics, Music, Physics, Social Education and Ethics and Technical Education. Apart from publishing classroom textbooks, it also publishes revision books in all the subject areas covered for final year students in both primary and secondary school levels.

Table 6.4 New Book Titles Published by EAEP 1987 - 1996

	Number
1987	58
1988	74
1989	71
1990	50
1991	50
1992	59
1993	48
1994	73
1995	60
1996	56
1997	58
1998	57

Source: Provided by publishing house

EAEP publishes more titles annually than any other publishing house in Kenya. The majority of their new titles are fiction novels followed by textbooks. They have a number of readers series targeted for various categories of audience.

6.5.4 Textbook Prices

The prices of textbooks in EAEP is based on a gross margin of 55 per cent on the selling price after a trade discount of 25 per cent and when pricing, the organisation takes into consideration the prices of competing books in the market. The prices of primary school textbooks range from Kshs 125.00 to Kshs 450.00 with those for secondary school ranging from Kshs 150.00 to Kshs 610.00 as per the 1999 catalogue. The high prices of their textbooks has been attributed to the finish quality of their books and the low print runs.

However, the institution is very sensitive on how they price their books, as the managing director said;

“price is a major factor and may have a big influence on your sales, if you do not price [your textbooks] properly you might find that it is not doing well in the market.”⁸

6.5.5 Printing of Textbooks

EAEP does not have its own printing press. The publishing house uses printing firms in the country and those in other countries, mostly India and Singapore. The local printers used by the publishing house are English Press, Kenya Litho, Sunlitho, Printpak, Acme Press and Fotoform among others. When the editorial department has finished with the editorial work, it passes on the manuscript to the Production department to solicit quotations from the local printers.

6.5.6 Distribution

In distributing textbooks through the country, EAEP has a Sales and Marketing Department that deals with customers and distributors. The company has also formed a distribution subsidiary known as East African Book Distributors that deals with warehousing. This is where bookshops and other regional book distributors get their stocks. It has appointed regional distributors in five regions namely, Mount Kenya, Rift Valley, Nyanza, Western and Coast. These regions do not correspond to any administrative boundary in the country but has been divided by EAEP for their book distribution purposes. In total they have eight regional book distributors.

Apart from using the bookshops and book distributors, EAEP also do a lot of marketing and promotion for their book and textbook titles. As the Managing Director said;

“for your books to penetrate and dominate the market, you have to adopt an aggressive marketing and promotion [policy], making sure that the books are always stocked by bookshops, but remember also that bookshops are given incentives to stock your books by allowing them attractive trade discounts of up to 50 per cent. This is what we

⁸ Interview with H. Chakava, MD, EAEP on 7/7/1998.

do to our publications and you will always find our textbook titles in bookshops everywhere in the country.”⁹

In summary the major contributing factor to EAEP is the large number of publications they have in the market. They have successfully developed a number of readers imprints which are used in schools as library books. Such novels have been developed in series where there are titles targeted for a specific age group. The other notable advantages that EAEP has in the market is the revision textbooks, and how they market their books. The other added advantage to the progress is that they had dominated the market since when it was a multi-national and they have carried on to maintain the standards and aggressiveness they had developed.

The other factor to be considered in the growth of the four educational publishing houses considered above is their management and staffing structures. It emerged that the state-owned publishing houses have more staff establishments than the private commercial publishers. This could in real terms affect their productivity and efficiency but it is debatable whether that happens in reality. The number of textbook titles published by each publishing house are seen to be the defining figure in their growth and future prospects. It should be noted also that the government and the private commercial publishers remunerate their staff differently and that could affect their productivity.

6.6 Other Educational Publishing Firms

As stated earlier in this thesis, there are over thirty publishing houses who are engaged in educational publishing in Kenya. Some of these publishing houses specialise on a few subjects and others publish only revision textbooks. Prior to the liberalisation of the textbook market in Kenya most of the publishing houses could not penetrate the core class textbook market and they used to publish either revision textbooks or supplementary textbooks. The revision textbook market was very

⁹ Ibid.

successful until those who had monopolies of the books being recommended by the MOEHRD as core textbooks joined in and published revision books as well.

During the fieldwork periods in Kenya, a number of publishing houses were visited and others were contacted by phone or letter. The publishers contacted were those who had a considerable number of textbook titles in the market. The views of the publishing houses were solicited as regards the effects of textbook market liberalisation, and how they were adjusting to a new marketing policy.

The number of new publications from the publishing houses were also recorded in order to compare with the total number of publications which had been collected from the KNB. The purpose of this task was to assess the percentage contribution of those publishing houses selected. The publishing houses whose new publications were recorded between 1987 and 1998 were EAEP, Gideon S. Were, JKF, KLB, Longhorn, Macmillan, OUP and University of Nairobi Press. Their total new publications are set out against the total number of published titles in Kenya.

Table 6.5 Number of new titles of eight educational publishing houses against Kenya's total new publications

	8 publishers	Total	Percentage
1987	111	591	18.78
1988	124	413	30.02
1989	135	389	34.7
1990	112	377	29.71
1991	110	285	38.6
1992	119	342	34.8
1993	99	217	45.62
1994	98	298	32.89
1995	102	179	56.98
1996	101	-	n/a
1997	95	-	n/a
1998	113	-	n/a

From the statistics above, the eight publishers produced over 32 per cent of the total books between 1987 and 1995. As said before, over 50 per cent of the textbooks were produced by the eight publishing houses. However, the exact number of books published could not be exactly confirmed, but the researcher used various sources to achieve the figures.

With the textbook market liberalisation, publishers whose books could not be included in the core textbooks will have their books now competing with books from the established and dominant publishers. It is only time which will tell how those publishers, whose books were not in the recommended list, will fare especially if they have been publishing revision texts. It remains also to be seen how those publishers who did very little in marketing of their books will cope in the new environment.

The turnover of the publishing houses in Kenya is strictly determined by the number of titles that an individual publishing house has in the market. However, in the recent past, the popularity of revision textbooks has increased and this explains why EAEP, JKF and KLB record high turnovers. A sizeable amount of their revenues are from the sales of revision textbooks and also novels (library books as they are called) in which the three companies and Macmillan Kenya have a number of titles.

It is important to note also that the development of the educational publishing industry relies on the Curriculum Development Centre to chart the way for them. The identification of the needs of the customers and the overall needs of the country are considered when curriculum changes are being made. The publishers will therefore select the subjects they would publish and the publishing houses who come out with well defined and interpreted texts will have the books selected and used in schools. The publisher, therefore, has to search for people with the right skills and knowledge to plan and develop the required texts. However, the publishers need the investment capital in order to come up with good texts to the right readership and at the right time.

Despite the declining number of new titles in publishing industry in general to the market, the publishing industry has the potential of improvement given the right

business atmosphere through implementation of favourable policies. There is some opening to explore as we shall be looking into the distribution and supply in the following chapter. It should be noted also that the growth of the publishing industry depends on the policies adopted by the government and the industry on the ground.

CHAPTER SEVEN

DISTRIBUTION AND SUPPLY OF TEXTBOOKS: From State Control to a Liberalised Market

7.1 Introduction

This chapter addresses how the distribution and supply of textbooks in Kenya has been, and will be, affected by the market liberalisation process. There are a number of policies that have been introduced into the market by the government which can potentially affect the distribution of textbooks. Textbooks in Kenya have been produced under circumstances where the government was the producer as well as the purchaser of the books at some stage. The books were distributed to schools for free by the government, and most of the titles were from the government owned publishing houses. However, the private commercial publishing houses were also actively publishing textbooks. The methods which were employed by the government in order to make the market restrictive to leave the private commercial publishers to play a peripheral role, was the use of a recommended list of textbooks to be used in schools.

Before independence in 1963 and up to 1972, the supply of textbooks was the responsibility of the various organisations who were running the schools. The educational publishers were mostly foreign publishing houses who were making and selling their books directly to the schools. A few bookshops and book distributors were established by enterprising business people after independence which included the Textbook Centre. Most of those who first established bookshops were people of Indian origin.

The establishment of the Kenya School Equipment Scheme (KSES) in 1972 slowed down the growth of any bookselling in Kenya. The KSES was established so as to buy books centrally and distribute them to Kenya's primary schools. Most of the books purchased (the majority from the government parastatal publishers) and distributed by KSES had to have a recommendation from the government as a core class textbook. At the time when KSES was in operation the state-owned

publishing houses did not have the capacity to supply all the textbooks needed in schools and private publishers (the majority were foreign owned publishing houses) got some share of the market, though most of their titles were recommended as supplementary titles rather than core titles.

In 1986 the World Bank and IMF introduced the Structural Adjustment Programmes (SAPs) to be followed by the government in its economic management. The SAPs are an economic programme sponsored by World Bank and IMF to make the government reduce public expenditure, including that on education and health in order to receive financial aid.¹ One of the effects of SAPs was the introduction of cost-sharing schemes in the education sector. This period marked the start of parents (through Parents Teachers Association (PTA)) and the community purchasing books for schools with very little government support. Individual parents were required to buy textbooks and other learning materials for their children. Most of the books getting core recommendations were authored by the curriculum centre and published by the state-owned publishing houses. Again evidence of the private commercial publishing sector being marginalised in the textbook market.

In line with the ongoing market liberalisation which began in early 1990s, a report from a group of consultants commissioned by the Ministry of Education in 1996 came to some stunning conclusions. The report showed that although the government had stopped the centralised purchase of textbooks, it was still controlling the production of textbooks. It was reported that the Kenya Literature Bureau (KLB) and JKF commanded over 90 per cent of the primary school textbook market. Both of these publishing firms are State owned and are referred to as parastatals. The report also concluded that KLB controlled about 15 per cent of the primary school and about 45 per cent of the secondary school textbook market. On the other hand JKF controls about 75 per cent of the primary school market in two core subject - mathematics and English.

¹ Leys, C. (1996) : *The Rise and Fall of Development Theory* : Nairobi, EAEP, 24; Makotsi, R. L. & Nyariki, L. K. (1995) : *The Book Market in Kenya Today* : Nairobi, (Report findings prepared for Dag Hammarskjold Foundation), 63.

The significance of these findings is that the two publishing houses were the sole publishers of materials prepared by KIE - the Curriculum Centre. Their books were given government's recommendations as core class textbooks. This designation shows that the school textbook market was skewed in the government's favour.

7.2 New National Policy on Textbook Procurement

The new policy was launched in September 1998. The main aim of the policy was to transform a largely government run publishing system by liberalising the textbook market through private sector participation. This would give schools and parents the freedom to choose the books to be used in their schools. With continuing reduction in government textbook expenditure (since 1988), it will remain to be seen whether parents have enough purchasing power to buy books. The intensity of marketing to schools and parents will have to be stepped up by publishers if they are to succeed in the more competitive market.

The government released this National Textbook Publishing Policy in September 1998.² The policy outlines the roles of government and the publishing industry in the textbook publishing process. The policy had been awaited eagerly by the publishers and seen as long overdue. A survey carried out by the author in June - September 1998 found out that, the publishers and the booksellers through their associations -Kenya Publishers Association (KPA) and the Kenya Booksellers and Stationers Association (KBSA) respectively had lobbied the government to come up with a policy.

If the policy as outlined is implemented it will represent a major step in the liberalisation of the textbook market in Kenya. This will lead to a more pragmatic approach to the production, selection, procurement and supply of textbooks. The previous arrangement was centrally controlled by the Ministry of Education (Ministry of Education and Human Resource Development (MOEHRD) since January 1998).

² Kenya. Inspectorate Department (1998) : *National Policy on Textbooks Publishing, Procurement and Supply for Primary Schools* : Nairobi, MOEHRD, 4.

When the author was collecting data in Kenya in June - September 1998, the Director of KIE in-charge of the primary school syllabus argued that the centralisation of production was necessary. This was to guarantee that books produced were of acceptable standards and relevant to the needs of the country. This line of argument was also put forward by the Director of Education in-charge of curriculum development in the Ministry. This was further emphasised by the Minister of Education in his foreword to the 1998 policy document. But, in order to produce textbooks of acceptable standards and quality, it is not necessary for the government to be involved in direct production of textbooks. Appropriate standards and relevance could be achieved through strict guidelines given to publishers on textbook publishing. The curriculum centre could also play the role of vetting published textbooks on the basis of the guidelines and syllabus it produces, thus alleviating any fears of erosion of quality.

The new policy (implemented at the beginning of 1999) is designed to encourage the liberalisation and commercialisation of the booktrade. This policy will encourage publishers to commission authors to write books that can have a competitive edge in the market, and yet still fulfil the educational needs. It is expected that this will lead to the development and production of high quality instructional materials for use in schools. The Minister of Education said, in his foreword to the policy document, that school based decision-making on textbook selection was important and he hoped that the policy will encourage the procurement and supply of relevant and high quality books.

In contrast to the former policy, schools will be able to choose the books that suit them in regard to their content and price. They will be actively involved in the decision making process of choosing books they use in their schools. The design and prices of the recommended books will play a major role in the decision of the school textbook selection committees (STSC) in individual schools. The policy requires schools, especially primary schools to form an STSC which will handle the selection and procurement of textbooks. The policy document suggests that the STSC should be made up of lower primary and upper primary teachers and at least two parents representing the PTA. This document addresses only the procurement

of primary school textbooks and not those for secondary schools. The selection of books in secondary schools is to be done by subject teachers. The subject teachers select books from a list of books which have been approved by the curriculum centre as meeting the laid down subject syllabuses.

The new textbook policy advocates that KIE concentrate on curricular development (research, design, review and development) and evaluation for all levels of education except university education. In effect the KIE will cease to be a centre for authorship and publishing. The previous activity of authorship by MOEHRD through KIE will now be left in the domain of publishers (both the private commercial and parastatals) and an emergent body of authors. The publishers will have to commission their authors, and this will also apply to the two state-owned houses, KLB and JKF. The publishers will also have the responsibility of promoting their textbooks and other instructional materials. The textbooks will be written on the basis of the official syllabus and guidelines published by KIE.

Publishers will submit their books to KIE for evaluation and vetting before getting approval to be used as textbooks in schools. A dialogue will continue under the new policy between the government agent (i.e. the KIE) and the publishers. When publishers submit their books for evaluation to KIE, subject panels (consisting of practising teachers, college tutors, university lecturers, religious leaders (for religious education subjects) and senior educationists) will consider them in view of the coverage of the syllabus and the design qualities. Other features which will be considered by the KIE in the textbooks are clarity of the texts, internal coherence, appropriateness to the age level, political correctness of the visuals and illustrations, vocabulary control, durability of paper and the general binding of the book which determines the shelf life of the textbooks. The publishers will receive comments on their submitted titles stating the reasons for recommendations or otherwise. Before the new textbook policy, the KIE used to give general comments ("*recommended*" or "*not recommended*") to the publishers about their books submitted for evaluation. The new textbook policy states that publishers be given the reasons why their books have not been recommended so as to improve on the shortcomings.

As opposed to the previous rule of one book getting recommendation as the core textbook per subject per class (i.e. grade year) and others being supplementary, there will be a maximum of six books recommended this time round. The idea of the core textbooks has thus been eliminated. This will give parents and STSCs a greater variety of material to appraise. The Ministry will be publishing a list of recommended books in the *green book* annually including newly published and recommended books. The book will be distributed to schools by November each year to allow STSC enough time to make selections for the following new academic year which starts every January. This *green book* will be used by the STSC to select their books from the publishers catalogues.

When the *green book* is released by the government in November, the teachers and parents have only one month to make selections of textbooks before the start of the new academic year. This leads to situations where in most cases textbooks are actually bought by schools and parents in the months of February and May. This leaves some schools without textbooks for the most part of their first term of the year. It is helpful if the MOEHRD could release the list of recommended textbooks early in the year in order to give time teachers and parents to make their textbook selections.

However, there will be a number of textbook titles that do not meet the required standards and are not included in the green book; such titles are returned to the publishers with comments. The publishers will normally revise such books according to the comments from the curriculum centre and resubmit them the following year. There are also revision textbook titles that are not evaluated by the curriculum centre and such book titles are in most cases for examination classes in both primary and secondary schools.

7.2.1 Pilot Project

The government established pilot programmes in 1997/98 before coming up with a policy aiming at liberalising the textbook market. The findings of a pilot project funded by the Kenya government and the Royal Netherlands Government in

Liakipia and Machakos districts was used as a basis. Three methods of book procurement and supply of textbooks were tested:-³

- purchase of textbooks by schools using cash and direct payment by schools to booksellers
- schools using Local Purchase Order (LPO) and/or Vouchers with payments being made by District Education Offices (DEOs) through District Treasury
- schools ordering (selecting), consolidation and payment by the DEOs through District Treasury.

In the first method schools were given money by the government and the donor agency. The various schools had the option of buying their books from a bookshop of their choice. In the second method, schools used LPO and/or Vouchers from the DEOs to order their books from the various booksellers available in their areas. And in the third method, schools selected their books, forwarded them to the DEO who consolidated from other schools and ordered in bulk, for eventual distribution to the various schools. The payments are made by the DEO through the District Treasury. In all the cases the schools had a free hand to select the books they needed as long as they were on the list of recommended books.

The pilot project led to the adoption by the government of two methods of procurement. These methods will be applicable in future government and donor funding. The methods are:-⁴

- i) Direct cash purchasing by individual schools. The government will provide grants to schools for the purpose of textbook purchases. Schools will be required to operate a separate bank account for textbook procurement projects. This will apply to schools in areas where there is a well established book distribution network.
- ii) Procurement through consolidation and payment by the District Education Officers (DEOs). Schools will be required to make their selections and submit their orders to the DEOs who will procure the

³ Interview with Mr. Buyela, Deputy Inspector of Schools (Curriculum) on 18th August 1998.

⁴ Anon. (1996) : Book aid to Needy Schools : *OUP News*, vol. 2, (June), 3; Anon. (1998) : Evaluation Workshop to Close Pilot Project : *OUP News*, Vol. 6, (January), 1.

textbooks and eventually distribute them to the schools. Adequate financial provision will be made available to enable DEOs to distribute the books to schools efficiently. This method will be used in areas where the book distribution network is not well established.

These methods will apply in areas where government still assists in the procurement of textbooks and when there is a funding by external donors. This will encourage and promote the book distribution network in Kenya.

The centralised system of textbook procurement by the government (method ii above) may still retard the development of the book industry. This is one of the issues which has been put forward aggressively by the booksellers fraternity. The booksellers see that the intrusion of the government in the book distribution chain, retards the growth of the industry. It has been suggested that if the government is to order books, it should use the existing booksellers rather than doing so directly from the publishers. The centralised system of textbook procurement is highly bureaucratic and is open to corruption. Some publishers may induce those responsible in the selection process in order to have their books selected or government officials may demand “special privileges” (financial or other forms of rewards) from the publishers.

It should be clear though that, when the government and donor agencies resumed providing books to disadvantaged schools in 1991, most of the books were sourced from parastatal publishing houses. The growing use of bookshops, which had started since 1988 was therefore hampered by the direct purchase of textbooks from the publishing houses.

7.2.2 The impact on Publishers

Most publishers interviewed by the author said that: whilst the liberalisation of the booktrade was a welcome move, competition will also be accelerated. The alternative likely to be used by publishers in the market is more sales representatives being sent to schools. Publishers may also consider scaling down the inputs and other overhead costs. As paper accounts for more than 60 per cent of book cost it will also be a major costing target for publishers. Publishers might

resort to using a cheaper paper which is likely to be of a lesser quality. Instead of using a 70 gsm printing paper, they may prefer to use a newsprint or a 60 gsm paper which will be of a lower cost. Reducing the amount of relatively costly graphics and illustration in books might be a target for savings by publishers.

In comparison with other countries like the UK and USA, textbooks may appear cheaper in Kenya. However, when taken in proportion to the average monthly incomes of the consumers in these countries, Kenyans are paying more. An average monthly salary for a primary school teacher in the UK is UK£ 1,338 (Central Statistical Office, 1996) and a textbook costs about UK£ 10 on average. This is approximately 0.7 per cent of their monthly income. While the average of their Kenyan counterpart is Kshs 5,000 (UK£ 50), a textbook costs an average of Kshs 150 (UK£ 1.50) taking approximately 3 per cent of their monthly salary. They pay more than three times their UK counterparts.

The government and the publishing industry should try to influence the paper industry to consider the needs of educational publishing industry. If the price of paper is reduced it may eventually result in a reduction in the prices of textbooks. The fact that Kenya produces paper makes it easy for the government to influence production to the advantage of the educational publishing industry and the public at large. At present, there is only one paper production mill in Kenya which produces over 70 per cent of printing paper quality. Panafrican Paper Mill (PPM) which is in Webuye in western Kenya is the only local paper mill which is capable of manufacturing bleached printing paper.

In line with the current market liberalisation, the government should encourage more investors in the paper industry by removing legislation that protects the paper industry from competitors. There is legislation that requires would be paper merchants to register with PPM so as to qualify to be paper distributors. Such legislation is against the spirit of market liberalisation and the government should abolish it.

In the previous policy, textbooks were categorised into core, supplementary and library and/or reference books. More emphasis was placed on core textbooks which were used as class textbooks in all schools in Kenya. In the new policy document a

maximum of six titles per subject per class will be in the approved list from the Ministry.

The Ministry will also be keen on vetting essential teaching support materials which were not considered before. This, therefore, means greater opportunities and diversification in the production of such materials by publishers. It is now the responsibility of publishers to submit to KIE any reference or teaching support material for vetting. This procedure will include such items as atlases, wallmaps and wall charts.

The transfer of decision-making on books to schools has been welcomed by publishers. Though the vetting still remains in the hands of the Ministry, the good thing is that the government will cease to be an author and distributor of textbooks. It is also encouraging to note that teachers now have a wider choice of books, although the difference is not so great from the previous policy since textbooks will be still recommended by the Ministry. The difference is that various schools will use books of their own choice rather than using *one* recommended book throughout the country. Schools will base their decisions on the strong points of a book and to some extent the marketing gimmicks of the publishers' sales representatives.

Publishers will mostly likely increase their marketing activities. The most likely is that more sales representatives will be sent to schools to convince the teachers that their stock is the best and hence that they should purchase it. Since Teachers Advisory Centres (TAC) have the responsibility for advising teachers under their care on curriculum matters, they will be the first point of call for publishers. We might even see a situation where zonal inspectors or TAC tutors are used by publishers to achieve their aim.

The role of TACs will be as reference points where schools get information on current recommended books. Teachers will also get assistance on the suitable books and other instructional materials on the recommended list. It is the duty of the tutors in TACs to advise schools on the books to be selected.

In the new textbook policy the Ministry has given advice to school headteachers to choose only one book from the recommended list of up to six titles per subject. The chosen title will be used in the respective class (grade) as their core-textbooks and,

where applicable, parents will be advised to purchase that particular title for their children. Parents will, therefore, be able to make a saving by not buying as many books as they used to do in the previous years. Before the publication of the new textbook policy subject teachers were accustomed to telling parents to buy the core-textbook title and a number of other supplementary and library books. This was an expensive outlay for parents with minimal disposable income, or none at all. It must be remembered that such purchases would make heavy demands on the meagre family budgets. To purchase a textbook is a major budgetary decision even in the more economically developed nations.

Apart from the benefits which parents will enjoy as a result of the new policy, both publishers and booksellers will benefit as well. The policy encourages competition in the market and more educational materials will be developed by publishers and those aspiring authors will get the opportunities to publish. This is an opening for the publishing industry in Kenya to exploit the situation and carry forward their development agendas. Muita⁵ said that the policy will lead to production of high quality textbooks in terms of content and packaging which will be of reasonable prices, and with market forces in place now, publishers, both private and parastatals compete on equal terms.

7.3 Bookshops in Textbook Distribution

The distribution of textbooks in Kenya has changed over the years. During the colonial period, before 1963, District Education Boards (DEB) or sponsoring churches had the responsibility of supplying books to schools under their care. The centralised system through KSES, functioned between 1972 and 1988. After 1988, individual parents and communities through fund-raising were responsible for textbook provision. The conventional booktrade chain has hardly been used in textbooks distribution in Kenya especially when KSES was in operation. With the abolition of KSES in 1988, more bookshops were established showing signs that a sizeable number of textbooks were being sold through bookshops. As Chakava has shown that the number of bookshops doubled from 200 in 1980 to 400 in 1990 due

⁵ Muita, D. N. (1998) : Kenya Introduces National Textbook Policy. *Bellagio Publishing Network Newsletter*, No. 23, 3.

to the abolition of KSES and the introduction of the 8-4-4 education system in 1985.⁶

Bookshops in Kenya are not as well developed as they are in the countries of Europe and the USA. Books in Kenya are sold through various type of premises including street vendors (hawkers), market stalls, *dukas* (general merchandise shops), supermarkets and conventional bookshops. The sizes of what can be classified in Kenya as a conventional bookshop ranges from a shop that stocks a few hundred copies of textbooks to a shop that stocks thousands of textbooks and general book titles. The majority of bookshops in Kenya have closed access shelves, where the customers are not allowed to browse the book shelves. The bookshop assistants, which in most cases are one or two in number, have to get the book the customer needs from the shelf.

The number of bookshops in operation in Kenya in 1999 was estimated by the author to be between 600 and 1000 both small and large. According to a list in a survey conducted by Makotsi, by end of 1994, there were 782 registered bookshops.⁷ These bookshop numbers include those which stock only a few titles and copies of textbooks or those that are selling office and school stationery materials.

However, the majority of well established and large bookshops in Kenya are in the major cities. One of the largest bookshop in Kenya is the Textbook Centre which sells books in retail and wholesale to other smaller bookshops in Nairobi and other towns. Other large bookshops in Nairobi include Savanis, Chania, Catholic bookshop, Nairobi University bookshop and Elimu among others. There are also other larger bookshops in other main towns in the country.

Bookshops in Kenya play a major role in the distribution of textbooks. Publishers also have been playing a part in encouraging schools to purchase their textbooks in their local bookshops. When publishers' sales representatives get orders from the schools they visit, they direct them to the local bookshops. With the textbook

⁶ Chakava, H. (1996) : *Publishing in Africa: One Man's Perspective* : Nairobi, EAEP, 15.

⁷ Makotsi, R. & Nyariki, L. (1995) : *The Book Market in Kenya Today: Survey Findings on Book Marketing and Distribution in Kenya* (report commissioned by Dag Hammarskjold Foundation) : Nairobi, Dag Hammarskjold Foundation, Appendix.

market liberalisation, it will be a great opportunity for the small and large bookshops in Kenya to prosper and take root.

One of the prominent bookshops in Kenya which is almost of the European or North American bookshop standards is Textbook Centre. It has two branches in Nairobi and a department that sells books in wholesale to other bookshops. Textbook Centre was established in 1964 and has survived in the business even during the periods when textbook distribution was under the control of government. Apart from selling textbooks, this bookshop deals with books for all levels of education including university and general titles and that could be the reason for its success in the industry.

The bookshop does not sell books from local publishers only but also imports books. It sells books from publishers in India, UK and USA. The bookshop has come to fill a gap by importing books which are not published by local publishers and needed by academic institutions like universities. With market liberalisation in place, the importation of books has been made easy and universities can order books published abroad and get them within a maximum period of six weeks. As the General Manager said:

“before the advent of market liberalisation, we used to apply for import licenses which used to take a long time and was cumbersome but now things are very easy for us.”⁸

The majority of bookshop owners and persons who manage bookshops in Kenya have very little or no bookshop management training at all. For proper management and functioning of bookshops as avenues for distribution of books, there is need to have people with some basic knowledge about book selling. It is not enough to just sit and wait for people to come and ask for books which you will sell to them as if one is buying cooking oil. Taking into consideration that some parents who have come to buy textbooks for their children might not know the alternative textbooks available for the title she/he has asked for, the bookshop attendants should know what alternative books are there and the strengths and weakness of the books. This will help them to explain to their customers about the books. It is important also for

⁸ Interview with Mr. C. D. Shah, General Manager, Textbook Centre on 12/8/1998.

them to know how to display the books in the premises and how to take stocks and monitor their sales movements.

However, there is another dilemma in textbook distribution facing those who live in rural areas. In such areas there could be one or two bookshops or maybe dukas that stock books, but with only a limited number of titles thus restricting the choice of textbooks available to the customers. Some customers feel that it is the publishers' responsibilities to make their books available in the bookshops as one parent said;

“they [publishers] should improve the distribution of [their] books so that bookshops are well stocked with all titles.”⁹

When the researcher visited some bookshops and dukas that sell books in rural centres, some of them had very few titles. It was learned that apart from the capital limitations that restricts the owners from stocking more books, some publishers had not made a point of promoting their books to those bookshops.

However, some publishers are facing difficulties in supplying their books to some bookshops. The major problem has been with those booksellers who have been supplied with books in the past by publishers on credit but have been very slow in settling their accounts. As the Marketing Manager of KLB said;

“the main problem we have with distribution is the reliability of some booksellers when they are ordering and settling their accounts. Since you cannot continue to deliver more books until they pay it means there will be delay in getting books to those areas they serve.”¹⁰

This underlines the problems that face the customers in searching for the books they need in their nearest towns. If the bookshop(s) that serve that area have not been honouring their obligations by settling their accounts with publishers, then the textbook users will be the victims of their actions. In other areas, there could be no business person who could be creditworthy by the criteria used by the publishers to supply the books on credit thus the little capital the bookseller has will be used to purchase a limited number of titles.

⁹ Interview with a parent in Machakos district on 18/9/1999.

¹⁰ Interview with J. Muraya, Marketing Manager, KLB on 2/7/1998

7.4 Kenya National Library Services in Textbook Distribution

Kenya National Library Services (KNLS) plays a major role in distribution of textbooks through library stocking and other general titles of books in Kenya. Its clientele access books from its branches which are situated in the various districts in Kenya.

KNLS was established through an Act of Parliament, CAP 225 of Laws of Kenya in 1965 and gazetted in 1967 to carry out its statutory functions. The functions of the KNLS include; to establish, equip, manage, maintain and develop libraries in Kenya; advise the government, local authorities and other public bodies on all matters related to libraries and documentation; participate and assist in campaign for the eradication of illiteracy; stimulate interest in books and promote reading for knowledge, information and employment; acquire books produced in and outside Kenya and publish the Kenya National Bibliography. The Library is attempting to perform its functions despite the economic difficulties in Kenya. One area which might have had problems is the publication of KNB as we shall see later in this thesis.

Since its establishment date, KNLS has now 20 branches countrywide. The organisation also operates mobile libraries by using a number of means to achieve the mobility of the library. KNLS operates mobile libraries in the following area libraries to reach schools and other library users in rural areas, Eldoret, Embu, Kabarnet, Kakamega, Kisumu, Mombasa and Nairobi. In places where road communication is difficult, KNLS has introduced motorbike/bicycle book boxes and camel library service. Most of the book boxes and books carried by the camels are textbooks meant to be loaned to schools. Through these activities, it is evident that KNLS has been active in the distribution of textbooks to reach the widest clientele possible.

The library acquires its stock through a variety of ways, apart from the purchases it makes, it receives donations as well. The acquisition of books is centrally made at headquarters after receiving requests from the library branches. The donors of the library are both corporate and individuals who could be local or international.

Among the international donors is Book Aid International that has been donating general book titles.

When the library orders books, over 90 per cent of the books are educational books, as the acquisition librarian said;

“since majority of our clientele are school children, when ordering books from publishers, textbooks for both primary and secondary schools make up 90 per cent of the orders.”¹¹

The libraries purchase their books directly from the local publishing houses. This, therefore, shows that the libraries promote the local publishing industry. It was also found out that when the library make their purchases, they are given a 25 per cent trade discount by the publishers.

The KNLS has a depository centre where publishers are required to deposit two copies of each and every new title they publish and this is clearly stated in laws of Kenya. The Books and Newspapers Act, Chapter 111, (miscellaneous amendments no. 22) of 1987, states that every publisher in Kenya is required to deposit two copies of each title with the KNLS. When KNLS receives the depository copies, they enter them into the KNB which is published at the Library. KNB carries entries of bibliographic information of all the books published in Kenya and other books about Kenya published outside the country.

However, the publication of KNB has been lagging behind and publishers had not been willing to submit their new published titles. It has been therefore difficult to compile and ascertain the exact number of new published titles in Kenya. From the statistics presented in chapter six, there is the possibility that the figures could be higher than what was compiled. The reasons given for the delay in the publication of the document which is expected to be annually was lack of trained staff.

KNLS also has been in the forefront in encouraging and helping in the establishment of school libraries. It should however be make clear in this point that very few schools in Kenya have what might be qualified as a conventional library. What is called libraries in most schools is cupboards in each class or in the staff

¹¹ Interview with J. Njeru, Acquisition Librarian, KNLS on 24/8/98.

room containing textbooks and other reading materials. KNLS also operates school book boxes in some areas. Such book boxes contain books which are intended to be borrowed by pupils. The book boxes are transported to the various schools by use of bicycles or motorbikes and left in the school for a term (three months).

KNLS have established a camel mobile library in Garissa, North Eastern Kenya and Bicycle/Motorbike book boxes in Karatina, Central province. However, they have stressed that apart from the book boxes which are targeted to school children, the camel library is aimed at serving the entire community but in practice the majority of users are school children.

7.5 Marketing of Textbooks

Publishers in Kenya use various methods to market their textbook titles to the customers. The methods used include: posters, calendars, book exhibitions and book fairs, school visitations by sales representatives, advertisement in newspapers and book displays on bookshop windows.

However, some of the teachers and parents interviewed during the fieldwork felt that publishers were not doing enough in promoting their books, as a teacher said;

“They [publishers] should provide more information to the public about their books and where they can be obtained from.”¹²

It should be noted at this point that it is at times difficult for the information to filter through to the rural areas. Most teachers and parents who live in rural areas are likely not to receive full information about where to get books in towns especially if they rarely travel to town; maybe only when they (teachers) are going to collect their monthly pay at the end of the month.

Some publishers send their sales representatives to schools with the aim of going to display their books in those schools and explain to teachers the strengths and advantages of their books over their competitors. Apart from the schools the same sales representatives visit bookshops and explain to the booksellers about the range of their textbook titles. Although these publishers’ sales representatives are in

¹² Interview with a teacher in Machakos on 16/9/1999.

theory expected to visit all the schools within the region they cover, they do not manage to reach rural schools as some teachers said;

“they [publisher’s sales representatives] should go to different schools and see the demand in order to supply the books to the bookshops, they always ignore a visit to rural schools like ours”¹³

The publishers should therefore learn that despite the fact that it is difficult to reach some rural schools, they should devise means of bringing teachers together from various schools to a central point in order to market their books to them. The most convenient place where such activities should take place could be in zonal education offices or market centre that could be central for three or more schools.

7.6 Transport Systems used in Textbook Distribution

The road network in Kenya could be classified as fairly developed (see appendix 2). There are all-weather roads connecting to almost all the fifty or so district headquarters in Kenya. The roads also to other towns in Kenya are good although there are some that could be impassable during the rainy season. Textbooks in Kenya are transported by road, railway and water (applies to islands on the coast and lake Victoria).

There is a single track railway line from Mombasa to Kisumu and Busia (heading to Uganda). The railway is used by most publishers though it is slower than by road. The preference for railway transport is due to its cost; bulky goods sent by train in Kenya are cheaper than goods sent by roads.

In Kenya, there are a number of transport companies that specialise in transporting goods from one place to the other. However, some publishers could also use passenger buses to transport their books to areas which are not served by the goods transport companies. Books therefore can reach any part of the country without much difficulties.

Apart from the courier companies, postal services are used in distribution of textbooks in Kenya. When bookshops order their books from publishers, the

¹³ Interview with teachers in Machakos district on 18/9/1999.

publishers will send them through the post office. The post offices in Kenya have their branches in all corners of the country, in fact it is one organisation that reaches over 90 per cent of the population. The use of the couriers and postal services in distribution of textbooks has taken root since the government ceased to be involved in the actual distribution of textbooks. With market liberalisation in place it is anticipated that more books will be distributed by use of these modes. The parties who will benefit from the liberalisation will be more, and the speed and efficiency of book distribution is likely to improve. Textbook users will, therefore, be the beneficiaries in the competitive textbook publishing and distribution.

It should always be in the mind of the publisher on how to reach the textbook users by using the cheapest and quickest means. It may be assumed by the publisher that the trade discount given to the bookseller will cover the transport cost thus their books are being sold to the end user at the recommended retail price. This at times does not happen especially when books are transported to some remote rural areas. We will now look at those who purchase the textbooks.

CHAPTER EIGHT

TEXTBOOK BUYING COMMUNITY

8.1 Introduction

The textbook buying community in Kenya can be identified by categories such as where they live (rural and urban). Their place of residence determines to some extent their level of incomes which can be further classified as poor and non-poor communities. When this study was undertaken, it was not only the parents and teachers who were considered as potential and actual textbook buyers but also the institutional bodies like the government, international organisations and NGOs.

Since publishers produce the books for pupils and teachers to use, it was deemed important to explore who actually meets the cost of the books in Kenya. In many countries in Africa and other developing countries various parties (e.g. World Bank helped in Uganda, DfID, SIDA, CIDA among others) purchase books for schools.¹ Textbook purchasing in Kenya has been the responsibility of a number of bodies before and after independence. Before independence in 1963 and prior to 1972 when KSES was established, textbook purchasing was the responsibility of those who were managing the schools. The bodies who were managing the schools at the time were churches and/or missionaries and District Education Boards (DEB). After 1972, the government had the responsibility of purchasing textbooks through the KSES and distributed them to schools in the entire country. These books were distributed to various schools through district education offices. The KSES brought in the centralisation of textbook purchasing where publishers had to bid for tenders to supply their books to the central purchasing unit.

When the KSES was abolished in 1984, a cost-sharing scheme was introduced into the education system in Kenya and therefore parents had to contribute to the purchases of textbooks. Although, in practice, the full implementation of the scheme did not happen until 1988. An assessment was done by the government in 1990, and the findings were that most schools in ASAL districts and others in Pockets of Poverty (POP) areas in otherwise developed districts had no textbooks

¹ Chakava, H. (1996) : Publishing in Africa: One Man's Perspective : Nairobi, EAEP, 14.

to be used by the pupils. The government started a social dimension programmes for textbook purchasing in 1991/1992 targeting those areas mentioned above. Those who were to fund the programmes were the government, PTAs, Donor Agencies, NGOs and Religious organisations.

8.2 Funding of Textbook Purchases by Donors

Development assistance have been given to developing countries by the more developed nations in order to improve the qualities of life and improve development awareness for the citizens. In providing assistance for textbook purchasing, the major aim has been to educate the citizens so that they will be actively involved in the development of their countries. In Kenya a number of donors including non-governmental organisations, foreign governments and international bodies have played a role in textbook purchasing. Such bodies include ASAL, World Bank, ODA (now DfID) and the Royal Netherlands government among other local NGOs.

In 1996, the government negotiated with the Royal Netherlands government to fund textbook purchases for schools in disadvantaged districts and areas within developed districts referred to as Pockets of Poverty (POP). The project was executed first by piloting two districts to see what method was best in supplying textbooks to schools (see section 7.2.1). In the pilot phase, the donor gave US\$ 26 million for the purchasing of textbooks in Liakipia and Machakos districts.

The Royal Netherlands government spent about Kshs 40.8 million (US\$ 0.68 million) in purchasing of educational materials for primary school level in Machakos and Liakipia district in 1996/97 pilot project.²

The British government granted the Kenyan government £18.97 million (Kshs 1.7 billion) to be spent over four years from 1998 in education projects. About Kshs 8 million (UK£ 0.1 million) of the money is to be used in acquisition of textbooks, readers and science and mathematics kits for schools and Teachers Advisory Centres (TACs).³ The TACs are reference points for teachers and therefore

² 1.2 million Dutch Guilders for Book Project. *OUP News No. 3*, Nov. 1996, 8.

³ Interview with Mr. W. Buyela, Deputy Inspector of Schools (Curriculum) on 18th August 1998.

recognised by the government as essential to be equipped with learning materials that can be used by teachers as resource centres. TAC offices serve a number of schools within a zone and therefore the spirit of resource sharing is very much in operation as a way of making limited resources serve a wider community.

Apart from foreign governments and international NGOs, there are local NGOs that have helped in the purchasing and provision of textbooks in schools. Those who are actively involved in the purchasing of textbooks include charity organisations fronted by religious organisations. As the Deputy Director of education said;

“we have been lucky that in some areas, there are organisations like Plan International in Nyambene district and Global in Taita Taveta district that have helped in purchasing textbooks for schools therefore easing the burden of the government and the parents.”⁴

It should be noted that most of these local NGOs have come to fill a vacuum which had been left by the government in textbook provision in schools (especially when there was no clear policy between 1984 and 1988 on who was to provide textbooks). With market liberalisation, such organisations will be able to purchase their books from any publishing organisation and not only from the state-owned publishing houses. These organisations also help those who have lower incomes and may not all manage to purchase textbooks for their children.

8.3 Textbook Purchases by the Government

The government is at present actively involved in the provision of textbooks in schools especially in primary schools. However, when the government restarted the provision of textbooks, the schools that used to receive such books were those in ASAL regions. Prior to provision of books to schools in ASAL areas as from 1991/92 government financial year, the parents of the schools and the community were responsible for the provision textbooks. However, when KSES was in operation between 1972 and 1984, all schools in the country used to receive textbooks purchased by the government.

⁴ Interview with D. Sang, Deputy Director of Education, on 1/7/1999 at his office.

When the government stopped purchasing books and supplying through KSES in 1984, a cost-sharing scheme was introduced, but by 1991 most schools in poorer areas had no textbooks. The government therefore started a project of purchasing textbooks in 1991, but books purchased were mostly those developed by KIE and published by the two parastatal publishing houses. In the scheme concentration was made on purchases of primary school textbooks.

The textbook purchasing project came as a result of the government recognising the inability of some parents to pay for the cost of essential textbooks. The purchased books were to be channelled to poor communities through social dimension programmes. Through the social dimension programmes (ASAL and POP), the poorer areas based on the socio-economic factors were first targeted in the provision of textbooks. When the government first started the project in 1991/92 financial year districts in ASAL areas were targeted and later POP in the more developed districts, but it was planned that all schools in the country will eventually benefit from the textbooks purchased by the government.

Under the new textbook policy, the government plans to provide financial assistance to schools based on partnership principles instead of purchasing and delivery of textbooks. With such plans the publishing and book trade industry will be benefiting and all this is in the spirit of market liberalisation. In these principles, the government will be providing financial support relative to the financial strength of the parents. It is envisaged that the poorest 25 per cent of schools will receive 100 per cent financial support for basic textbook supplies. The next poorest 25 per cent and 30 per cent of schools will receive 60 per cent and 40 per cent financial support respectively; the last 20 per cent of schools will receive 20 per cent financial support for textbooks.⁵

The government has increased budgetary allocations to meet the cost of textbooks for schools in Arid and Semi-arid Lands (ASAL) and Pockets of Poverty (POP) areas. In addition to this, various overseas donors e.g. The Royal Netherlands government and the Department for International Development (DfID - UK,

⁵ Kenya. Inspectorate Department (1998) : *National Policy on Textbooks Publishing, Procurement and Supply for Primary Schools* : Ministry of Education and Human Resource Development, Nairobi, 14

formerly ODA) have joined hands with the government in trying to meet the needs of the disadvantaged communities in provision of textbooks.

The government has been setting aside funds at the beginning of every financial year for the purpose of textbook purchases. It should be noted though that the funds budgeted for this purpose may not be available. As the Deputy Director of Education said,

The problem is that we do not get enough money to purchase textbook as per our budget proposals to the government; like in 1997/98 financial year we had put a proposal of Kshs 237.6 million for purchases of textbooks but we only got Kshs 19.5 million.⁶

However in the 1997/98 financial year the government through the Education Ministry supplied the planned number of titles to the schools since publishers supplied the books on credit. The Deputy Director of Education informed the researcher that some part of the money planned for the 1998/99 financial year was used to offset the debt of the books supplied already. The Textbooks purchased and money allocated and made available by the government between 1991/92 and 1997/98 financial years were as in the table 9.1 below.

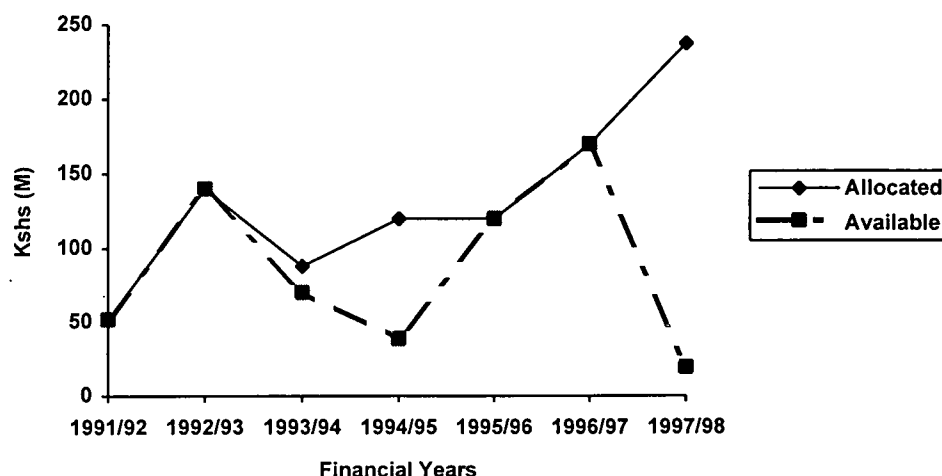
Table 8.1 Number of Textbooks Purchased by the Government, Amount Allocated and Actual Money Available

Year	Textbooks copies Purchased	Allocated Amount Kshs(M)	Actual Amount available Kshs(M)
1991/92	935,176	52	52
1992/93	1,520,477	140	140
1993/94	746,911	88	70
1994/95	297,500	120	38.76
1995/96	1,173,576	120	120
1996/97	1,296,000	170	170
1997/98	1,528,607	237.6	19.5

Source: MOEHRD files

⁶ Interview with D. Sang, Deputy Director of Education on 1st July 1999 at his office.

Figure 8.1: Government's Allocated and Actual Money Available for Textbook Purchases 1991/92 - 1997/98



Since 1991 and by the end of 1997/98 financial year the government had purchased and supplied 6,498,247 copies of textbooks to schools in ASAL areas and POP areas in developed districts. The government has been keen to increase the amount allocated to textbook purchases but the setback has always been the availability of the cash. Since the project was started in 1991, by 1997/98, the government had allocated Kshs 927.6 million (UK£ 9.276 million) but in real sense the available amount was Kshs 610.26 million (UK£ 6.1026 million). However, the number of textbook copies purchased and supplied to schools has been increasing except in 1994/95 when some publishers refused to deliver the books because they had not been paid for the previous year's deliveries.

The government had bought over 120 titles of both pupils' books and teachers' guides in the following subject areas; Agriculture, Art & Craft, Business Education, English, GHC, Home sciences, Kiswahili, Mathematics, Physical Education and Science. The titles and their publishers were as follows;

Table 8.2 List of Textbook Titles Purchased by the Government

Title	Publisher
Primary Mathematics Pupils' Book (1, 2, 3, 4, 5, 6, 7, 8)	JKF
Primary Mathematics Teachers' Guide (1, 2, 3, 4, 5, 6, 7, 8)	JKF
Progressive Peak English Pupils' Book (1, 2, 3)	OUP
Progressive Peak English Teachers' Guide (1, 2, 3)	OUP
Primary English Pupils' Book (4, 5, 6, 7, 8)	JKF
Primary English Teachers' Guide (4, 5, 6, 7, 8)	JKF
Primary Science Pupils' Book (1, 2, 3, 4, 5, 6, 7, 8)	KLB
Primary Science Teachers' Guide (1, 2, 3, 4, 5, 6, 7, 8)	KLB
Primary Kiswahili Pupils' Book (1, 2, 3, 4, 5, 6, 7, 8)	KLB
Primary Kiswahili Teachers' Guide (1, 2, 3, 4, 5, 6, 7, 8)	KLB
GHC Combined Pupils' Book (1, 2, 3, 4, 5, 6, 7, 8)	JKF
GHC Combined Teachers' Guide (1-3, 4, 5, 6, 7, 8)	JKF
Primary Agriculture Pupils' Book (4, 5, 6, 7, 8)	KLB
Primary Agriculture Teachers' Guide (4, 5, 6, 7, 8)	KLB
Primary Home Science Pupils Book (4, 5, 6, 7, 8)	KLB
Primary Home Science Teachers' Guide (4, 5, 6, 7, 8)	KLB
Primary Business Education Pupils' Book (6, 7, 8)	KLB
Primary Business Education Teachers' Guide (6, 7, 8)	KLB
Art & Craft Teachers' Guide (1, 2, 3, 4)	JKF
Primary Physical Education Teachers' Guide (1, 2, 3, 4, 5, 6, 7, 8)	JKF

Source: MOEHRD files

The purchases of the above textbooks were made before the current market liberalisation in the textbook market and therefore most of the books were published by the state-owned publishing houses. One other thing which should be made clear is that all the textbook titles listed above were developed by the curriculum centre. However, the government has been buying more textbooks copies for English, Kiswahili, Mathematics and Sciences. Out of the over 6 million copies bought within the period under review, over 4 million copies of the books were of the four subjects.

The government is committed to achieving a target ratio of 1 textbook : 3 pupils in classes 1-5 (ages 6 - 10) and 1 textbook : 2 pupils in classes 6 -8 (ages 11 - 14) for core subjects (English, Kiswahili, Mathematics and Sciences). It is projected that 50 per cent of this target will be met within five years from 1998. The government budget line on textbook provision will have to be strictly maintained through the substitution of consumer based financing in order to meet the projection. Hence the problem of making textbooks and other learning materials available to schools will have been solved.

8.4 Textbook Purchases by the Parents and Teachers

Apart from meeting the cost of textbooks for their children, parents are expected to buy school uniforms, stationery, pay school fees and meet other user charges. This stretches the limited incomes of the Kenyan parent. The cost-sharing scheme which came into effect in Kenya between 1984 and 1988 has had a tremendous effect on the cost of education. By 1991, it had emerged that in most schools, especially those in disadvantaged areas (mostly in arid and semi-arid lands - parts of Rift Valley province, North Eastern province, Eastern Province, parts of Coast and Nyanza provinces and slums in Nairobi city), children had no textbooks at all. This prompted the government in association with donors to start provision of textbooks to such disadvantaged areas, under the social dimensions programme.

The problem of shortage or lack of textbooks in schools was clearly a result of low incomes among the Kenyan population and the priority given to other life essentials. The real wage income of most Kenyans having been decreasing in real terms which makes it more and more difficult for them to purchase textbooks for their children. The average price of a primary school textbook is approximately 3.8% of the average monthly income of the poor Kenyan. This is more than what is typically spent on education. These prices represent approximately 1.9% of the average monthly income of the non-poor. This clearly shows how difficult it is for an employed Kenyan to afford a book at such prices. The situation is worse for those who are not in any wage earning employment.

Unless there are other sources of income, most ordinary Kenyans may not be able to afford to buy textbooks for their children. There is a need for concerted efforts between the industry, the government and the community to make books affordable. The government and the publishing industry fraternity should be able to make concessions which can bring the prices of textbooks down to affordable levels for the population. Such concessions should address taxation policies in the publishing and printing industries.

The average cost of a primary school textbook in Kenya is Kshs 200 (UK£ 2.00) and those of secondary schools average Kshs 290 (UK£ 2.90). Though the prices may look low, one has to consider the purchasing power of the intended customers. Most Kenyans are low income earners, depending mostly on income from agricultural produce. The fact that books come as last priority in most Kenyans shopping lists makes the matter worst.

In comparison with prices of basic foodstuffs, books have proved to be relatively expensive to ordinary Kenyans. The price of a 2 kg packet of maize meal (the staple food) is approximately Kshs 30 (UK£ 0.30) which can feed a family of four for two days. A tin of potatoes (local unit of measurement) which can feed the same size of family for a week costs approximately Kshs 60 (UK£ 0.60). When parents are faced with such choices, they will buy food instead of books.

Parents in Kenya are generally keen to purchase textbooks for their children. In the schools visited, it came out clearly that parents make contributions towards the acquisition of textbooks for the school. From the contributions made by parents, the teachers organise to purchase the textbooks and make them available to the pupils during class lessons. In private schools visited, when a new pupil is enrolled in the school his/her parent is required to pay a certain amount towards the purchasing of textbooks. But in public schools, parents could either purchase textbooks individually or the PTA organises fund raising for the purchase of textbooks. Public and private schools in Kenya therefore acquire their books in different ways and in most cases, public schools have fewer books available to pupils at school. The schools mostly rely on the government and the parents to purchase books for their children and sometimes donations from well wishers or old students of the school.

In some schools visited during the research, especially those in urban areas, pupils were told by the teachers to bring their own textbooks to class during lessons. In such schools, each parent has to purchase textbooks for their children. It was discovered that in schools where there is no library, the school had only a few books which are used by the teachers as reference books. Such books are bought by the school but in some cases, the teachers also had to purchase their own books to use during class lessons. In some schools however, they had established school textbook projects whereby parents contributed money for purchasing of textbooks on a yearly basis. In one school it was stated by the head teacher that they started a project to purchase textbooks for all the classes which was to last for four years. After, the four years the circle would begin again; they had planned to purchase textbooks stage by stage starting with primary one and eight.

During the study, seven textbooks (see section 3.6.1 and section 5.7) had been selected for the case study and parents and teachers were asked whether they had bought the books in the last twelve months prior to the interview date. It was evident that the parents and teachers could have only bought the books if their children were being taught or if the teachers were teaching the subject. It was evident also that in some cases the parents or teachers may have not bought the books because they were available in the school and pupils had them for their use. In the study those who had bought *Masomo ya Msingi Kitabu cha 7* were 49 respondents; those who had bought *Primary Mathematics Pupils' Book 4* were 82; the *Primary Art and Craft standard 6* had been bought by 26 respondents; *Secondary Home Science Form 1* had been bought by 16 respondents; *Certificate Geography Form 2* had been purchased by 23 respondents; *Commerce Students' Book Form 3* had been bought by 19 respondents and *God Meets us: CRE Form 4* had been purchased by 13 respondents. The number of respondents who purchased the book also depended on the number of students who were studying the subject and the availability of the book. For instance, *Commerce Students' Book Form 3* was not available in some bookshops visited by the researcher. However, it should be noted that some parents were complaining that the prices of most of the textbooks are beyond their reach in financial terms.

The market liberalisation process in the textbook market has put a lot of stress in the parents domain. However, the process may come to their rescue if the publishers will lower the prices of their textbook titles due to the competition in the market since more textbook titles will be recommended by the curriculum centre. It is envisaged that most publishers whose books were not in the core textbook recommended list will now find their books competing on the same levels with those who had dominated the market over the years. It remains to be seen how the publishers will respond for the benefit of those parents who had been forced to buy books at expensive prices.

CHAPTER NINE

MODELLING AND EVALUATION OF THE SECTORAL INDUSTRY

9.1 Introduction

As we have seen in the previous chapters, there has been a considerable change in the way educational publishing and distribution of textbooks in Kenya is undertaken. For a while since independence in 1963 and prior to it most of the textbooks used in schools were imported. In this chapter, we shall attempt to explore the growth trends of the sectoral industry.

However, in order to appreciate the stages of development, we found it necessary to look at the other sectors. This involved looking into the changes in the number of educational institutions (notably schools), the enrolment and how these might have affected the growth of the publishing industry. It is also important to consider government social and economic policies in this chapter as they contributed to the growth or otherwise in the publishing industry.

It must be noted that educational publishing brings together political and business interest and therefore the evaluation of this study involves both political policies and business consideration. There have been various education commissions in Kenya since independence and this chapter will consider how they may have affected the publishing industry. The liberalisation of the textbook market was not only a social or political decision but also a business decision from a publishers' and booksellers' stand point.

There are five periods in which the growth of the publishing industry and other associated industries can be modelled and evaluated; early growth (1963 - 1975), consolidation and expansion (1975 - 1986), decline and crisis period (1986 - 1993), recovery and liberalisation (1993 - 1999) and liberalisation and future growth (1999 and beyond).

The activities of the periods mentioned above were all interconnected and had influence over the development and growth of the industry. We shall focus on

significant events and policies that took place in the five periods which have been identified in this study.

9.2 Evaluation Rationale

In order to get a clear picture of the process and development in the educational publishing sector and the publishing industry in general in Kenya, a formula of how to evaluate it was created. It was seen to be necessary to create a model of the process of the whole industry since independence in 1963 by evaluating the main structures. The main features which were looked into in the model were the industry structures/environment, process/policies, mechanism, limiting/growth factors and changes and development (see pp 198 - 200).

The model adopted in this paper correlates the events that occurred in different periods of time since Kenya became independent. However, the model is a hybrid of a period-based and stages of growth model. This model is descriptive in nature showing the events that took place in the educational and publishing industry chronologically. In the model also, the policies that were adopted are stipulated with their resulting events traceable in the format. The model is presented as a visualisation so as to indicate the events that occurred on each of the five features in each of the periods which have been used in the model.

The necessity for creating the model on the basis of the factors mentioned was to obtain a clear picture of how each of the factors has changed and influenced the direction of the publishing industry in Kenya. In considering the **structures** and/or the **environment**, it is possible to explore how the structures and the environment of educational publishing have changed since independence in the expectation of growth in the industry.

The **policies** and/or **process** features cater for the evaluation of the various education policies in Kenya which have had implications for educational publishing. It is necessary also to see how the policies which had been initiated were adopted and implemented through inclusion in the process/mechanism factors in the model. As this thesis explores the impacts of political and economic policies it was deemed necessary to evaluate the industry by including an operational

mechanism. The **mechanism** and/or **process** feature therefore explores the activities which were carried out after the establishment of the policies by the government. It also goes further to include the events that took place in and outside the education sector and the publishing industry.

The **limiting** and/or **growth factors** were included in order to evaluate if the policies and the mechanisms adopted were a hindrance or a boost in the development of the industry. And finally we had to consider the **changes** and **developments** if any, which has been brought about by the factors which have been considered. In this last feature both positive and negative events that took place in the publishing industry are taken into consideration.

The method used in the modelling and evaluation of the publishing industry in Kenya was seen to be necessary in order to understand the impact of the kinds of policies and how the policies were implemented. It is hoped that in evaluating the industry in this way, it will be possible in future to identify what impact the policies did have on the growth of the industry. In analysing this model chronologically, by policy and dynamically we can obtain a better view of its growth, and perhaps infer its shape in future.

Publishing Growth Model in Kenya

Year	Environment/Structures	Policies/Process
1963 - 1975 Early Growth	<ul style="list-style-type: none"> • Social impetus to provide education • Objective to eradicate illiteracy • Establishment of Education commissions e.g. Ominde 1964, Ndegwa 1971 	<ul style="list-style-type: none"> • Inherited from colonial government • National System of Education • Changed to 7 - 4 - 2- 3
1975 - 1986 Consolidation and Expansion	<ul style="list-style-type: none"> • Examination and evaluation of the education system and the curriculum • Establishment of education commissions e.g. Gachathi 1976, Mackay 1981, Kariithi 1983 • Objectives modified to make self reliance after graduating 	<ul style="list-style-type: none"> • Changes in the number of subjects studied • Put more emphasis on science and technical subjects to be taught • Change of education system to 8 - 4 - 4 (1984/85)
1986 - 1993 Decline and crisis	<ul style="list-style-type: none"> • Evaluation of education system policies • Establishment of education commissions e.g. Kamunge 1988 • Evaluation of financing of education material 	<ul style="list-style-type: none"> • Changes on funding of educational materials • Selection of the subjects to be funded and areas • Number of subjects examined in primary schools reduced
1993 - 1999 Recovery and market liberalisation	<ul style="list-style-type: none"> • Evaluation of the previous education commissions 	<ul style="list-style-type: none"> • Continuation of 8-4-4 education system • New policy on textbook production and procurement
1999 - Future growth	<ul style="list-style-type: none"> • Evaluation of the number of examinable subjects to be offered in secondary schools 	<ul style="list-style-type: none"> • Proposals to change number of subjects examinable in senior secondary schools • Implementation of new textbook policy

Mechanism/Process	Limiting/ growth factors
<ul style="list-style-type: none"> • Develop curriculum and syllabuses • Establishment of KIE as curriculum centre • Develop learning materials and writing of textbooks • Establish KSES to distribute learning materials 	<ul style="list-style-type: none"> • Establishment of public and private publishing houses • Foreign publishing houses in the market • Establishment of JKF
<ul style="list-style-type: none"> • Re-define functions of curriculum centre • Textbook materials written at the KIE • Categorisation of textbooks into core textbooks, supplementary and reference/library books • Introduction of cost-sharing scheme 	<ul style="list-style-type: none"> • More local private commercial publishing houses • State owned publishing house given monopoly to publish textbooks • Foreign publishers sell some of their share holdings to local citizens
<ul style="list-style-type: none"> • Introduction of market liberalisation and SAP concepts by IMF to the Kenyan Economy • Ban of Textbook importation • Winding up of KSES • Implementation of cost-sharing scheme • Introduction of social dimension programme to supply textbooks • Political change to multiparty 	<ul style="list-style-type: none"> • Foreign publishing houses sell off their share holdings • Problems in the private publishing industry • Devaluation of the local currency • Mismatch of economic policies adopted with social policies • Freezing of IMF/World Bank financial aid • High rate of inflation • High bank borrowing interest rates
<ul style="list-style-type: none"> • Textbooks written by subject panels at KIE • Textbook market liberalisation increase number of textbooks recommended 	<ul style="list-style-type: none"> • Private commercial publishers involved in core textbook publishing • Stabilisation of the local currency in the money market Adjustment of economic policies and low rates of inflation
<ul style="list-style-type: none"> • Schools could choice in a wider range of books • Establishment of School Textbook Selection Committees 	<ul style="list-style-type: none"> • Textbook and book market extended to other neighbouring countries

Change and Development
<ul style="list-style-type: none"> • Increase in number of schools • Increase in number of pupils enrolled • More book and textbook titles written in Kenya
<ul style="list-style-type: none"> • Continued increase in number of schools • More pupils enrol in schools • Number of new titles continue to raise
<ul style="list-style-type: none"> • Reduction in number of pupils enrolled in schools • Decline in the number of new textbook and book titles produced
<ul style="list-style-type: none"> • Increase in number of schools • Increase in number of pupils enrolled • Increase in number of new textbook and book titles
<ul style="list-style-type: none"> • More new textbook and book titles

9.3 The Environment and Structures in the Educational Publishing Industry: Chronological Analysis

Early Growth 1963 - 1975

When Kenya gained its independence from the British colonial government, there was a small educational and publishing infrastructure already established (see section 1.4). One of the first things for the government to do was to identify social problems, define policies and set objectives of how to eradicate those identified problems. The social ills which were identified were illiteracy, poverty and diseases. These problems which had been identified were to be solved by formulating various strategies and policies.

In addressing the illiteracy problem, the government established the first post-independence education commission in 1964, which was the start of the early growth period. This was to address the way forward for education in Kenya. The education commission's recommendations resulted in the unification of the education system in Kenya which was inherited from the colonial government. A national education system where pupils were enrolled in primary school education for seven years, secondary school four years, high school two years and a minimum of three years in university (7-4-2-3) was therefore adopted. These changes had a lot of implications for the educational publishing sector.

Apart from the changes in the education system, a national curriculum centre was also established in order to be in-charge of curriculum and syllabuses development. Before independence, there were a number of subject advisory centres (such as Mathematics advisory centre, English teaching advisory centre and Science advisory centre) which were in-charge of advising the government on the teaching of those particular subjects. The curriculum centre (the KIE) was also in-charge of the writing of education materials since the textbooks which were used in schools were mostly imported by the foreign publishing houses.

When the curriculum centre developed the learning materials, they were passed on to publishing houses to publish them but the predicament was that there were no local publishing houses in operation. Most of the publishing houses who were

operating in Kenya were foreign publishing houses whose main activities were selling imported textbooks as well as scouting for manuscripts which were later published by their parent companies in the countries of origin. The absence of local private publishers led to the establishment of JKF by the government and some local publishing houses were also established.

The government also established another education commission in 1971 in order to assess the success of the education policies which had been implemented in post-independence period. This led to the establishment of KSES in 1972 with the responsibilities for distributing textbooks and other learning equipment to schools. It should be noted also at this point that there had been an increase in the number of schools and those who were enrolled in them. The establishment of KSES was to address the lack of institutions that could effectively deliver the books to all the corners of the country. The main aim of establishing the institutions like KSES and the government's involvement in textbook production and distribution was to address the need of textbooks in schools and meet the objective of eradicating illiteracy.

Although the government played a leading role in the development of the educational publishing in the first decade of Kenya's independence, the private publishing firms also flourished. The number of local private commercial publishing houses registered in Kenya were on the increase, examples were Equatorial publishers, EAPH and Transafrica Publishers among others. The downside however was missing the opportunity to encourage the development of writers who would interpret and develop manuscripts from the subject syllabuses from the curriculum centre. It may be debated also that there could have been other avenues to follow rather than what the government did. The options available at the time were for the government to source textbooks from the private commercial publishers and give financial or other rewards to authors who had written textbooks. This could have increased competition amongst the publishing houses leading to greater growth in the publishing industry.

Consolidation and Expansion 1975 - 1986

In the period between 1975 and 1986, the major features in the educational and publishing industry in Kenya were; establishment of three education commissions which lead to various changes in the education system and the demise of KSES. The functions of the curriculum centre were also changed and there was an increase in the number of subjects studied in schools creating more opportunists for the publishing industry. The period also marked a decline in the activities of foreign publishing houses and a sudden increase in number of local publishers and number of new titles published.

With changes in the needs and challenges of the country, the government felt that there was need to evaluate and assess whether the initial objectives of eradicating illiteracy in the country had been achieved. This was done by the establishment of other education commissions in 1976, 1982 and 1983. These commissions resulted in the re-definition of the functions of the curriculum centre and also the parastatal publishing houses. These commissions covered the period of consolidation and expansion as we have identified in this study.

In the publishing industry as well, the foreign publishing houses were incorporating their local branches so as to play a part in the production of textbooks. It may be argued that their reasons behind the registering of local companies were the fact that they did not want to be seen as foreigners supplying educational materials to schools. There were also some local entrepreneurs who had established educational publishing houses.

Although in the middle of 1970s and earlier 1980s, the number of local publishing houses had increased, the textbook market was still dominated by the foreign publishing houses and the parastatal publishing firms. One of the publishing firms apart from JKF and foreign publishing houses which were involved in textbooks publishing was EALB. When the East African Community (EAC) broke-up in 1977 due to political differences among the member states, EALB ceased to operate as did other regional bodies. The market for the foreign publishing houses which were operating in Kenya also shrunk. It should be noted that the publishing

industry in Kenya was not only serving the local market but also the other three East African states since they had a common examination body.

When the EAC was disbanded, it led to the establishment of the Kenya National Examination Council which replaced the East Africa Examination Council which was charged with the regulation of Examinations in secondary schools. The establishment of KLB in 1980 was to take over the functions which were performed by the EALB. Its functions included the publishing of manuscripts which were developed at the curriculum centre.

The education commission of 1981 which was established to look into the establishment of a second university as its flagship point of reference came up with the recommendation of changing the education system. It therefore led to the introduction of the 8-4-4 education system in 1985. The new education system came with the introduction of more and new subjects to be taught in schools. Although the textbook market was still dominated by the parastatal and foreign publishing houses, there were a number of local private commercial publishing houses publishing textbooks.

When the government was purchasing textbooks which were being distributed to schools, publishers whose titles were on the recommended list used to submit tenders. When the new education system was introduced which required new textbooks, most of the local publishing houses had their books used in schools for a short period between 1984 and 1986. The number of new titles published at this period were very many. However, since the government was not actively involved in textbook purchasing parents wanted to know the right textbook titles for the new education system and therefore the government reintroduced the textbook recommended list which was used when the government used to purchase textbooks.

The functions of the curriculum centre were extended to writing of textbooks after the introduction of the new education system. The government also stressed that the manuscripts developed at the KIE should be forwarded to KLB and JKF for publication. When the curriculum centre made the list of recommended textbooks, most of the titles were those which had been developed and written by their staff.

Titles from the private commercial and foreign publisher were not prominent on the list. However, a consolation to them was that the list was divided in categories of core textbooks, supplementary and reference/library books. The core textbooks were mostly those published by the parastatals. This led to the foreign publishing houses selling off their shares to local Kenyans and others closing down their business. As the needs of the country were changing, the government was also reviewing its financing and education policies. This was demonstrated by a number of education commissions; the Mackay education commission of 1981 and Kariithi education report of 1983. This led to the introduction of a new education system in 1985 and new curriculum which came with its own challenges for the government and the educational publishing industry. When the new education system was adopted, there was a need for new textbooks for the new subjects introduced to be taught in schools. There was a need to realign the curriculum centre and develop new materials. However, the planning and the introduction of the new system of education was done in a hurry with limited co-ordination between the private and public sector.

However, the major player in the educational publishing scene was still the government. The purchases and distribution of textbooks was largely in the government hands. The sector which could be said to have been affected most was the book trade (distribution) industry. The market size to support the publishing industry was on an upward trend as demonstrated by the number of those who were being enrolled in schools and the number of learning institutions (primary and secondary schools).

However, after the establishment of the institutions and other infrastructure related to education and educational publishing, there was need to consolidate and expand them. This required the collaboration of the private and public sectors by each doing what is expected of them and also in a way beneficial to the development of the other and vice versa. If the government had to overstep and perform functions which are clearly in the domain of the private sector then it will affect its efficiency. As we shall see in the following sub-sections, the expansion of the

market requires that the government and other related organisations have access to strong financial backing.

As the number of schools and pupils in schools had increased, the government was to increase its budgetary allocation in order to continue with the provision of textbooks and other materials needed in schools. However, the resources available for the task were becoming scarce and therefore the government had to think of other alternatives. The number of subjects taught in schools had also increased leading to an increased number of titles and copies which the government was supposed to purchase and supply to schools. The pressure on the government coupled with scarcity of funds led to the withdrawal of textbook purchases by the government in 1984 leading to the abolition of KSES.

As the government moved out of textbook distribution, the private sector came into the scene and led to an expansion in the number of bookshops in the country. The government also had paved the way for the cost-sharing scheme in which parents had to meet part of the cost of the education of their children. Textbooks were therefore purchased by the parents and in some cases by the community through fund raisings (*harambee*).

When the education system was changed in 1984/85, the publishers had no clear-cut policy from the government on the kind of textbooks they should publish. The change had been effected in hurry without doing it in phases which could have given the publishers time to develop educational materials in stages. Since the government was moving out of textbook distribution, and the well established publishers were not very sure and had not prepared for the changes which had taken place in the education sector, a crisis period was surely on its way. This was the start of the decline and crisis period in the educational publishing industry which was a result of some policies which were implemented by the government.

Decline and Crisis 1986 - 1993

In the decline and crisis period between 1986 and 1993, the prominent features in the educational and publishing industry were the introduction of SAPs leading to cost-sharing schemes. The SAPs brought with it decline in the economy marked with high interest rates, local currency devaluation, market liberalisation in some

sectors of the economy, an aid freeze by World Bank/IMF and political changes in the country.

The co-ordination between the public and private institutions on policies regarding educational publishing is very important. What happened in Kenya between 1986 and 1993 was that, a number of planned but uncoordinated government policies and economic activities were not implemented uniformly.

Apart from the education and textbook distribution policies adopted by the government, economic policies which were political in nature were also being implemented. Due to pressure from the World Bank and IMF, the government was advised to re-structure its economic activities in order to receive financial aid from the institutions. This led to the introduction of SAPs which had recommendations that the government reduce its public expenditure on education and health services. The government therefore introduced cost-sharing schemes in the two vital public services, education and health. As such policies were being implemented, the pressure in financial terms was building up on the parents.

There had not been a clear policy on the type of textbooks to be used in schools. However, at the same time the publishing industry had been opened up (showing some signs of market liberalisation), there is some evidence that product quality was poor. As a reaction to this the government intervention could have been directed towards regulation rather than engaging itself in textbook writing and production. The curriculum centre which had been playing the role of developing curriculum and syllabuses was now taking on the role of writing manuscripts and delivering them to the two parastatal publishing houses to be printed. It also had the role of recommending textbooks which were to be used in schools. This led to the regime of classifying textbooks into three categories (core textbooks, supplementary and reference/library books). Clearly those books classified as core textbooks were those which had been written by the KIE and published by the parastatal publishing houses. Before KIE's involvement in textbook writing textbooks used in schools used to come from both the parastatals and private commercial publishers (which included foreign and local private publishing

houses). The private commercial publishing houses now therefore had to do only with the supplementary textbook titles.

The other sectors of the industry which help in the development of the educational publishing like the financial and paper sectors were not performing well. There was a financial aid freeze by the IMF to the government and the local currency was devalued and floated on the money market. Other knock-on effects which came with those events were an increase in inflation and bank interest rates. The prices of commodities including textbooks rose as a result. Since the government had introduced cost-sharing schemes, most of the general population could not afford to purchase textbooks and that affected the growth of the educational publishing.

Those who were in the educational publishing business had difficulties as the cost of book production had become expensive. The foreign publishing houses still operating in Kenya sold off their remaining shares to local entrepreneurs as a result of reduced profits although some could argue that it was a move to encourage local publishing.

However, when the government established a commission in 1990 to evaluate the impact of cost-sharing in education, it was clear that most of the schools in the poorer areas still had no textbooks. It was clear that if the situation was to be salvaged, the government had to come in again and provide funds for textbook purchases. This led to the establishment of a social dimension programme in which the government and other donors financed the purchasing of textbooks.

The other thing needed was to reform and formulate policies that could rejuvenate the educational publishing industry and get it out of crisis. However, the publishing industry does not work in isolation and there was need for reforms in other sectors. The free market principle was not only introduced to the educational publishing sector but also to other sectors of the economy that the poor in the society depend on. As the income and the purchasing power of the population was low due to the adverse effects generated by the policies previously followed, this meant that there was very little the educational publishing industry could gain in revenue and profitability.

It should be remembered also that although the government had at the outset committed itself to eradicating illiteracy, the cost-sharing scheme was no better policy to follow. The eradication of illiteracy could not possibly be met with the severe shortage of textbooks in schools. The cost-sharing scheme also required that parents pay school fees to enable their children to be enrolled in schools when they did not have the money, and it led to low enrolment in schools. With low enrolment and low purchasing power among the population, the educational publishing suffered in terms of its production and sales.

The other downside in the publishing industry was the control and involvement of the government in textbook production. For the educational publishing industry to grow, there was a need to leave it in the hands of the private commercial publishers who could develop the textbooks using the syllabuses from the curriculum centre. As the government had involved itself in book production and evaluation, there was certainly conflicting interest since being a player and a regulator does not augur well especially in a competitive situation.

Recovery and Liberalisation 1993 - 1999

There had been a down turn in the economy in Kenya in the early part of the 1990s due to the factors mentioned in this thesis (see section 2.6). There was a need to adopt policies that would rejuvenate the economy and make things work. Between 1993 and 1999, the major significant indicators of the rejuvenated economy were the reduction in inflation rates and stabilisation of the local currency in the money market (see figure 9.4) due to economic policies. The textbook market was also liberalised in 1999 opening up to all publishing houses and abolishing the restrictions of certain titles recommended as the core-textbooks. The government also established a judicial commission of inquiry to investigate the implementation of recommendations from the previous education commission.

From 1993 to 1999 can be said to have been the start of recovery and market liberalisation period in the educational publishing industry. The government with assistance from NGOs and other donor parties continued to make purchases of textbooks which had been started in 1991 and distribute them to schools in poorer areas. Although in the initial stages, the textbook titles purchased were from the

two parastatal publishing houses, it was later to widen to include titles from private commercial publishing houses. This was a big boost to the textbook market and in turn increased the textbook sales in the country. The purchasing power of the textbook market that had diminished greatly since the introduction of cost-sharing in education and health needed a boost.

The opening up of the textbook market by increasing the number of textbook titles recommended to be selected by schools was a great boost to the educational publishers. Another encouraging event with the potentiality of increasing growth of educational publishing was the curriculum centre ceasing being a writer of textbooks. The publishers both state-owned and private commercial publishers could now compete in the textbook market without one having an unfair advantage over the other. The unfair advantage was eliminated when the government abolished the categorisation of textbooks as core-textbooks, supplementary and reference/library books. The parastatal publishing houses had been dominating the publication of core textbooks.

1999 and beyond

Since 1999 (and hopefully in the years to come), the educational and publishing industry has witnessed changes following the implementation of the new textbook procurement policy which involved schools taking centre stage in textbook selection. The government also planned to change the curriculum and the publishing industry was exploring possibilities of exporting books to the neighbouring countries.

The government also plans to increase budgetary allocation in the education sector in her endeavour to eradicate or rather reduce poverty. It is believed by the government policy makers that poverty can be eradicated if more funds are placed in education. However, with the government putting more money into foreign and local debt servicing than education and health put together, it remains to be seen how those policies will affect the publishing industry.

The publishing industry has also taken advantage of the establishment of East African Co-operation and Common Market of East and Southern Africa (COMESA) regions, and has exported textbooks to countries like Uganda,

Southern Sudan, Tanzania, Burundi, Rwanda and Zimbabwe. It is also planned by the government to increase budgetary allocation on textbook purchasing in line with the continuation of the social dimension programme which was started in the 1991/92 financial year. The programme is planned to cover all the country and improve the textbook pupil ratio in schools.

9.4 The Environment and Structures in the Educational Publishing

Industry: Policy/Process Analysis

When the Kenyan government gained its independence from British rule in 1963, the main priority was to provide basic physical necessities for the people. The political leaders defined three things to be eradicated: illiteracy, poverty and disease. From this point, the new government had to adopt a plan on how to meet its objectives. Since the government had identified illiteracy as a social problem, they had to set the parameters of how to deal with it.

This section of process analysis involves looking into what policy changes the government undertook in addressing the educational sector and the educational publishing industry.

It should be noted also that to establish successful publishing institutions, there are other features that go hand in hand in the building of such institutions. These include efficient institutions for supply of raw materials, the market for the books, the distribution infrastructure and finance. The production of textbooks requires paper to be easily accessible and of sufficient quantity. This was actually fulfilled by the establishment of the local paper mill, PPM in Webuye western Kenya.

Although there were no radical changes in the education system, a number of opportunities had risen between 1963 and 1975 which could propel the growth of the publishing industry. Although the curriculum was not changed, some elements in the textbooks were changed so as to reflect the cultural and social complexities and conform to ideas of political correctness. For example some history textbooks had some wordings like "*the first man to discover mount Kenya*" such were changed to "*the first European to see mount Kenya*". This therefore required re-writing or new textbooks all together. Apart from that the number of pupils

enrolled in schools was on the increase therefore requiring more textbook copies to be printed.

In order to meet the social needs of the country, the government had to establish the needs and assess the available resources and structures. The government therefore established its first post-colonial Education Commission to carry out needs assessment before embarking on changes in the restructuring of the education system. The 1964 Education Commission chaired by Prof. Ominde assessed the existing education system in Kenya and made recommendation on how to carry forward from where the colonial government had left.

When the recommendations of the Prof. Ominde report were implemented, it was followed up in 1971 by another education commission chaired by Ndegwa to reassess the successes and shortfalls of the education system. The earlier commission of 1964 resulted in the unification and harmonisation of the education system which had been established on the foundations of racial grounds. These commissions however made recommendations which were peripheral to the educational publishing sector but with the potential of affecting it in many ways.

When the curriculum centre had been established and was running, there was the need to turn the materials generated into a transferable knowledge by developing them and packaging into an appropriate means. There was therefore the need for authors and writers who could interpret the syllabuses of the various subjects which had been developed at the curriculum centre. In the inherited education system, most of the textbooks were written by foreigners but the government wanted textbooks which were developed and written in Kenya. The curriculum centre was therefore given the task of writing the books which were to be used in schools.

The written manuscripts of school books which were developed at the curriculum centre had to be published, but there were no local publishing houses except the branches of foreign publishers. The government therefore had to establish its own publishing houses and that lead to the establishment of JKF. Although EALB had been established, it could not cope with the demand for producing the textbooks needed. It was however realised that the parastatal publishing house could not meet

the demand, and so the services of the foreign publishing houses were enlisted in the sourcing of textbooks for the schools.

Since the government had built the structures to put a national education system in place, the need for constant evaluation was necessary. The government established other educational commissions which carried out assessment which resulted in changes in the education system. It is important to note that it was not only the education system that changed but also the curriculum; both have a direct impact on the educational publishing.

As the national objectives and the social and economic needs of the country were constantly changing, there was also a need to change the system of education to prepare the citizens for the challenges ahead. Changes in the education system were made in line with the developmental changes in the country for instance putting more emphasis on technical and scientific areas. The changes had been brought about by the constant changes in the world of economics and technology which are essential in the development of a country. This was clearly evident when the education system was changed. The government decided that more technical and science subjects were to be introduced in schools and made compulsory for students to study them. This was with the aim of the country getting more trained personnel in technical and scientific fields.

The available infrastructure in the publishing industry was limited during independence and was mostly dominated by the foreign publishers. However, with the quest by the government to provide textbooks to the growing number of the population in schools, and also what should be seen to have social and cultural relevance to the population, the government established its own publishing houses. The establishment of JKF in 1965 was to address the need to have educational books published in the country instead of relying on importation of textbooks from abroad. Although the curriculum centre had been established and was producing syllabuses which were to be used in writing and publishing books, there was still a need to see that the textbooks were locally produced.

The structural and environmental build-up since independence in Kenya had the potential and capacity to sustain a growing educational publishing sector. The

various education commissions which had been established to make needs assessments of the educational sphere in Kenya could have been used to explore how to encourage a local educational publishing sector without too much government intervention.

Another aspect which had inspired the growth of the publishing industry was the ready market. The government through its KSES bought textbooks and distributed them to schools. But, the government was biased in its procurement process by positively discriminating against the foreign publishing houses. Although the government's distribution techniques succeeded, the increase in number of schools and pupils was to be a challenge. If the government had encouraged the development of booktrade outlets (bookshops), Kenya could be having at present a more developed book distribution network.

The other factor which could have made a lot of difference in the publishing industry in Kenya was the encouragement of local individual authors to participate in the writing of textbooks. The government's decision to let syllabuses and textbook materials be developed at KIE might have been an ambitious project of taking full control of textbooks and learning materials production. The control of what was to be in-between the covers of the textbook could have been addressed more by rigorous evaluation and vetting of the textbooks before being released to the schools.

Since the government wanted to make sure that the books going into the schools were meeting the curriculum and syllabus requirements, KIE was given the task of vetting textbook titles from publishing houses. When KIE was established some of its functions included co-ordination of teacher training and examination, engaging in research and development of curriculum guidelines. When KIE vetted textbook titles, it was to recommend only one textbook title per subject per class which was to be used in all schools in Kenya. This narrowed the number of titles available for teachers and/or schools to select and also restricted the development of a variety of textbook titles.

This policy of one textbook title per subject per class was abandoned in 1999 and a maximum of six titles were to be recommended to schools by KIE. This was one of

the fundamental changes that came with the market liberalisation in the textbook market. Apart from the widening of the choice of textbook titles available to be selected by schools, the educational publishing in Kenya was also making inroads to the markets of neighbouring countries. The growth potential of the educational publishing industry in Kenya had been increasing.

Although the educational publishing had been dominated by the government for a considerable period of time, the private commercial publishing houses had survived on the sales of supplementary and revision textbooks. They had been forced by the government's successive policies on textbook production and sales to adapt to publishing revision textbooks which later proved to be very popular among students who are entering their final years in both primary and secondary education.

There are a number of lessons which ought to be learned from the events which transpired between 1975 and 1986 in the educational publishing industry especially as from 1983. It demonstrated that careful planning and co-ordination between the private and public sector is very important. It should be noted that with very limited infrastructure for book distribution, the publishing industry itself will not achieve its potential efficiency. Since there was no clear-cut policies on how the new educational materials were to be produced and distributed it paved the way for all to enter into the publishing or printing of textbooks. There was need for time to develop and pilot the textbook materials based on the new curriculum and to plan as well how such textbooks were to be distributed in the absence of the KSES after 1984 which had dominated the scene for quite sometime.

The aim of the government in adopting policies which resulted in the establishment of parastatal publishing houses was in a way promoting local publishing. The governments' decision to purchase and distribute books was also to make books available to all schools which was with the aim of eradicating illiteracy. However, the establishment of such structures required heavy financial commitments and prudent managerial skills. There was need to find people who were committed to manage the publishing and distribution sectors with minimal costs if efficiency was to be maintained.

The government's decision to adopt a policy of vetting and controlling the books used in schools was to determine what is being taught in schools and also easing the parents burden of buying unnecessary texts. However, the government's decision to make the KIE the centre of authorship and also a vetting centre had more weaknesses than benefits. It is not possible for a body to judge objectively its products against others. The KIE was therefore boxed into a situation where it had to make a decision of whether to select their books as the best or those from other authors and publishing houses. If they had not selected their books as core-textbooks, then people might have questioned their ability to set syllabus and curriculum guidelines. The educational publishing industry had therefore missed an opportunity for its products to be judged objectively.

9.5 Developmental Changes in the Educational Publishing Industry: Dynamic Analysis

This section analyses the mechanism/process, the limiting and growth factors and change and development features. In the discussions we will look into the various factors in the features that have influenced the growth of the publishing industry. This will involve analysis of the factors in graphical manner.

The growth of the publishing industry depends on the growth of its market by size and its purchasing power. The availability of both human and capital resources are very important in the development of the industry. The availability of well trained personnel who would work in the publishing industry and those who are available to write books are very important for the growth of the industry. As mentioned in the earlier chapters of this thesis, there are authors and also well trained personnel who are working in the publishing and the distribution sectors of the publishing industry. Apart from the availability of the staff, capital investments in the infrastructures of the publishing industry is needed.

However, it is important to note also that the purchasing power of the customers is vital for the development of the industry. The purchasing power of customers who form the market will in effect determine the growth of the industry by both number of copies printed and number of new titles being released into the market annually.

In Kenya, the growth of the market which can be measured by the number of schools and those who have enrolled in them has been rising since independence in 1963. The number of primary and secondary schools in Kenya have risen by 173 per cent and nineteen-fold between 1963 and 1996 respectively (see figure 9.1). Those who were enrolled in schools also had grown at higher percentages, the primary school enrolment increased by over five-fold and secondary schools by over twenty-fold between 1963 and 1996 (see figure 9.2). With such high percentage growth in the market, it is expected also that the publishing industry should grow at almost the same level or there will be a serious shortage in the supply of textbooks.

However, other factors that determine the growth of the publishing industry are the disposable income available for the customers to purchase the books, capital investment, infrastructure in the publishing and distribution sector, stability of the economy in general and political stability among others. It should be noted also that other controls which may hinder the growth of the industry are the government and economic policies prevailing at the time. Considering the number of new titles produced by Kenyan publishing houses as a gauge of the industry's development, between 1963 and 1995, there was a rise of 155 per cent (see figure 9.3 and table 9.1). However, there were years within the period that show production of new book titles higher than the 1995 production. The government's involvement in the publishing industry could have had some implications on the production levels as the number of titles produced reflects on the number of publishing houses in operation.

It should be noted also that the availability of capital investments which could be ploughed into the commissioning and production of new titles depends on the sales of the copies. When the government used to purchase textbooks, it was providing a ready market for educational publishers though not all publishing houses had their books purchased since there was a recommended list of textbooks.

It should be clear also that there are policies that determine the government's textbook purchases. As we have seen, when the government was purchasing books

by using a central body (KSES), it had its own challenges and advantages. As the government provided transport there was a strong element of subsidy.

The cost-sharing scheme which was introduced in 1988 was one of those policies which affected the educational publishing as well as the budget plans for the consumers. The policy was adopted at a time when there was high inflation, high bank interest rates and other World Bank SAP policies were being undertaken, and they proved to have an effect on the production of textbooks. These policies affected the disposable income of the customers since they had to contribute to the cost of education for their children. As it happened when a study was carried out in 1991, it was clear that some schools had virtually no textbooks. Such could have been avoided if there were some pre-cautionary measures taken with the introduction and implementation of the policies.

There are other contributory factors which may have resulted in the lack of textbooks in schools after the implementation of the cost-sharing scheme. As we had seen the prices of textbooks published by the major educational publishing houses more than doubled between 1991 and 1998, the main reasons being inflation rates and devaluation of the local currency. As it is, most of the raw materials used in the publishing industry are imported with exception of paper, although their prices are based on international paper prices. The local currency lost over 222 per cent of its value against the British pound and over 234 per cent against the US dollar between 1988 and 1998 (see figure 9.4). This affected the prices of almost everything in the country including imported paper (see table 1.3 and figure 9.5). The devaluation of the local currency also affected the real income value of most Kenyans. High interest rates and weaker currency lowered the purchasing power of the population.

The production costs of the books also determine the cost of textbook acquisition to the customers. When the government abandoned the central purchasing of textbooks and embraced cost-sharing schemes, it was a challenge to the textbook users and customers. As their purchasing power had been weakened and prices of textbooks gone up, they could only purchase a few textbook copies or none at all. With reduced number of textbooks being bought by the users, the publishing

industry's revenue is reduced. When schools or textbook users have less textbooks for them to use, their education performance will be affected.

9.6 Results of the Modelling

The modelling of educational publishing has demonstrated a number of significant events that have transpired since Kenya gained independence in 1963. These variables and mechanisms can be summarised below:

- The domination by foreign publishing houses through the importation of textbooks.
- Government policies defining social and educational needs through education commissions.
- Government establishment of parastatal educational publishing houses to carry out textbook publishing.
- Government engaged in textbook purchasing and distribution.
- Governmental engagement in textbook writing by involving the curriculum centre.
- Government categorising textbooks which discriminates on textbooks from private commercial publishing houses.
- Financial aid freeze by the World Bank IMF leading to high interest and inflation rates resulting in higher textbook prices.
- Introduction of cost-sharing schemes resulting in the shortage of textbooks in schools.
- Poor performance and decline in the number of new titles produced.
- Introduction of social dimension programmes through purchases of textbook for ASAL and POP areas by the government.
- Introduction of market liberalisation in the textbook market by the government.
- Increasing the number of books which can be selected by schools through the abolition of textbook categorisation.

It is clear from the figures and findings presented in this chapter that the activities of the educational publishing industry depends on many factors. The inter-

connection between the social, economic and political factors all determine the growth of the industry.

Although there were a number of policies which were implemented and adopted by the government in order to boost education and economic development, there were mixed reactions in the publishing sector. When the government formed educational commissions it was hoped by all parties concerned that such commissions would result in policy recommendations that would address the provision of quality education. The quality of education which had been expected was one with adequate learning materials in all schools in the country which would have resulted in well trained personnel.

If quality education is to be provided, quality learning materials should also be within focus in the establishment and implementation of policies. We should note that if quality learning materials are to be provided then the processes of developing them should be addressed before addressing the problem of making the books available in schools.

The quality of research for, and the financing of, the development of textbooks is very important. The industry which has to develop such materials should be monitored and evaluated with the aim of improving rather than with the aim of controlling them i.e. taking a regulatory rather than a production role. As said before, what is taught in schools is of importance to the social and cultural development of the nation, but that does not mean that the government should be directly be involved in the writing and production of textbooks.

The model adopted in Kenya in educational publishing had various shapes and shades which might have contributed to the developmental trend of the publishing industry in Kenya. However, it should be appreciated that publishing in Kenya is one of the most well established in Africa, but if the government had not interfered in many ways it might have done even better.

The establishment of parastatal publishing houses was a noble idea, but if they had been left to operate with very little government patronage and to develop a freer role as the sole publishers of core textbooks, they might have made a greater contribution to the growth of the publishing industry in Kenya. These parastatals

should have been allowed to receive syllabus guidelines from the KIE so as to develop their own textbook titles which could be delivered later for evaluation and vetting at the curriculum centre.

Encouraging competition amongst the players in educational publishing could have resulted in a better and well structured educational publishing sector in the 1990s. The narrowing of the recommendation of textbooks to be used in schools to one textbook per subject per class in all primary schools in Kenya (in 1986) could be said to have been restricting the growth and exploitation of would-be quality textbook writers. When the government decided to adopt the policy of leaving the responsibility of developing and writing textbooks to the KIE, it was tantamount to the suppression of the creativity and potentiality of most Kenyans who would have happily participated in the writing of textbooks.

The introduction of cost-sharing schemes in 1985/86 during the SAPs implementation had a problematic effect as the economy continued to weaken. There was little consideration of the strength of the purchasing power of the customers and on that basis textbook purchases could be sacrificed to household essentials. It must be noted also that the introduction of SAPs was as much political as economic policy since they were made a condition of aid by the World Bank and IMF. The idea of eradication of illiteracy which had been adopted immediately after independence seems to have disappeared on the way.

9.7 Projections to the Future

As we have seen there are indications that the potential market of educational publishing has grown and outstripped the growth of the publishing industry. There are also indications that either the policies adopted within the education sector or the publishing industry were not planned according to the prevailing circumstances.

From the statistics available, the number of those who will be enrolled in schools for the next five years (2000 - 2005) will continue to rise if the growth movement over the last five years is maintained. However, the rising number of schools and pupils does not directly imply that there will be a direct growth in the publishing

industry. Positive government policy will in the end be the driving force behind the growth of educational publishing.

The new textbook policy which came into effect in 1999 is a promising start for the growth of educational publishing in Kenya. This policy has the potential of encouraging competition amongst the players in the market. Since the number of textbooks recommended to schools has been increased from one to a maximum of six, this will encourage more publishers to enter the lucrative textbook market.

It is hoped also that with the decision-making of textbooks purchases being made by the users (teachers), there will be a real competition since they will choose books which appeal to them in terms of content and price. Publishers will try to upstage each other by improving the quality of their textbook titles and at the same time lowering their cover prices. However, the other most important aspect of all is the disposable income available for the textbook consumers to purchase books. With the government's help in financing those from ASAL and POP areas, it is a promising prospect in the development of the industry.

The prices and pricing of textbooks is a major element in the development of the industry. The balancing between offering lower textbook prices and publishing houses making profits is very delicate yet publishing houses have to survive if the 'liberalised' system is to survive. However, if the prices of books are to be reasonable and affordable to most users, then policies of taxation of paper and other equipment used in the publishing industry should be reviewed by the government. Although Kenya is the second largest paper producer in Africa, the prices of local produced paper are comparable to the imported paper due to taxes levied on them. Another factor which could have contributed to the high prices of paper is the monopoly enjoyed by the major printing paper producer and its distributors. If the paper industry was subjected to open competition, it is likely to get the paper prices down which could lead to marginal reduction in textbook prices.

Table 9.1 Number of New Book Titles Published in Kenya 1963 - 1995

YR.	000	100	200	300	400	500	600	700	800	900	Total
1963	53	-	-	-	-	-	7	-	2	8	70
1965	6	-	43	55	-	45	6	12	-	17	184
1966	14	-	22	38	-	9	12	16	-	14	125
1967	34	-	28	55	1	14	4	4	-	22	162
1968	8	-	42	92	-	5	12	38	9	26	232
1969	5	1	50	85	3	15	6	29	8	24	226
1970	3	-	48	55	-	13	10	27	8	17	181
1973	1	2	93	30	6	12	9	51	7	28	239
1976	4	1	59	65	10	13	7	2	19	13	193
1980	17	4	18	34	-	16	29	2	90	22	232
1981	11	7	21	43	-	20	28	8	43	27	208
1983	10	2	50	48	18	23	17	20	23	24	235
1986	23	3	97	229	91	102	94	47	131	116	933
1987	2	1	64	86	109	134	88	24	46	37	591
1988	1	1	93	54	54	43	85	8	37	37	413
1989	-	3	91	59	57	44	77	9	17	32	389
1990	12	1	88	68	42	31	53	14	40	28	377
1991	9	2	76	53	35	17	58	3	20	12	285
1992	-	-	98	78	31	25	55	12	25	18	342
1993	7	4	54	47	16	12	35	4	28	10	217
1994	6	3	73	73	39	21	36	14	15	18	298
1995	2	3	31	34	36	19	18	8	18	10	179

Key

000 - Generalities

100 - Philosophy

200 - Religion

300 - Social Sc.

400 - Philology

500 - Pure Sciences

600 - Applied Sc. 700 - Arts

800 - Literature

900 - Geography and History

Source: KNB, 1992, 1993, 1994, 1995; UN Statistical Yearbook, 1966, 1974, 1982, 1995.

Figure 9.1 Growth of Primary and Secondary Schools in Kenya 1963 - 1996

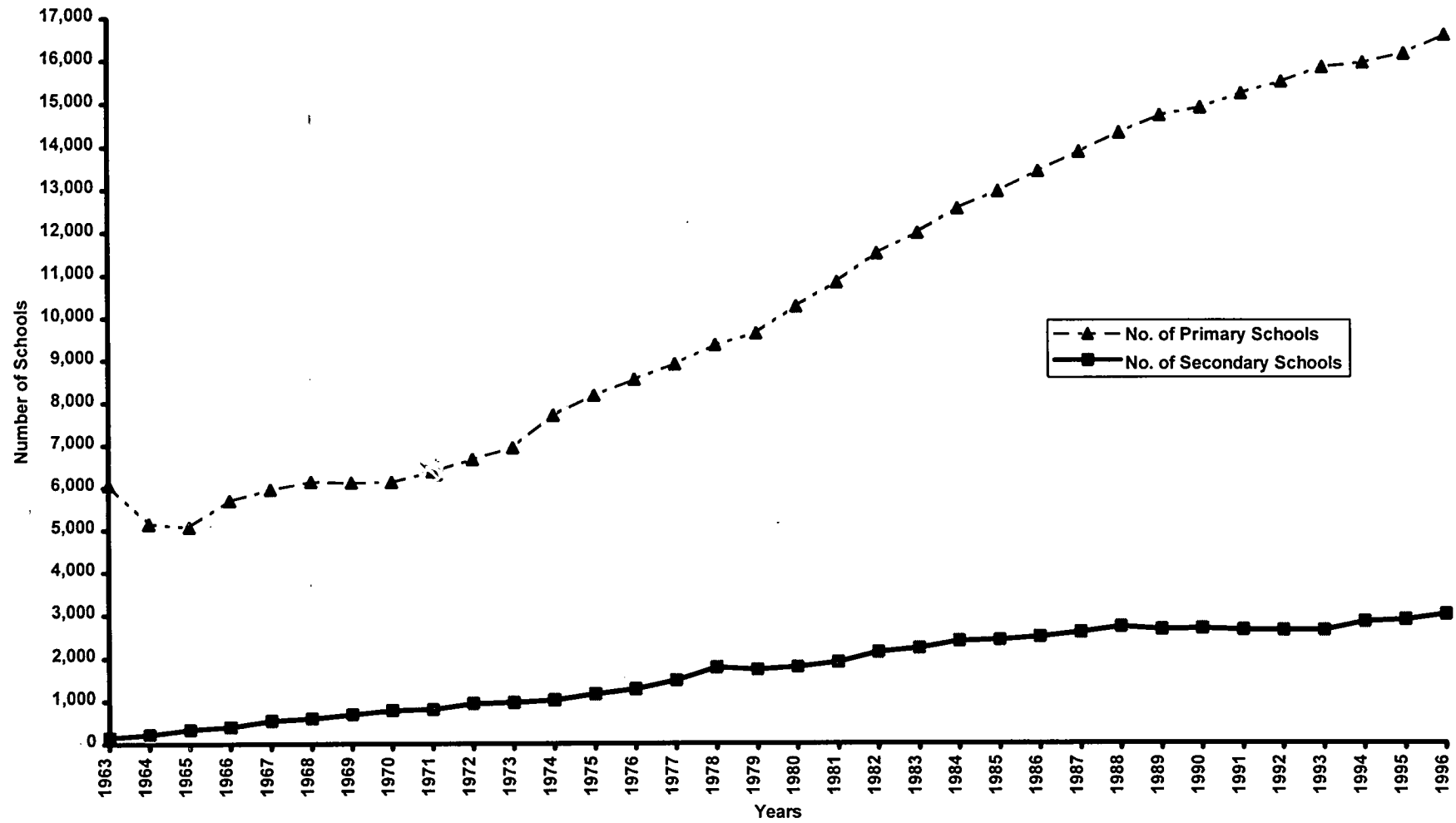


Figure 9.2 Total Pupils Enrolled in Kenyan Primary and Secondary Schools 1963 - 1996

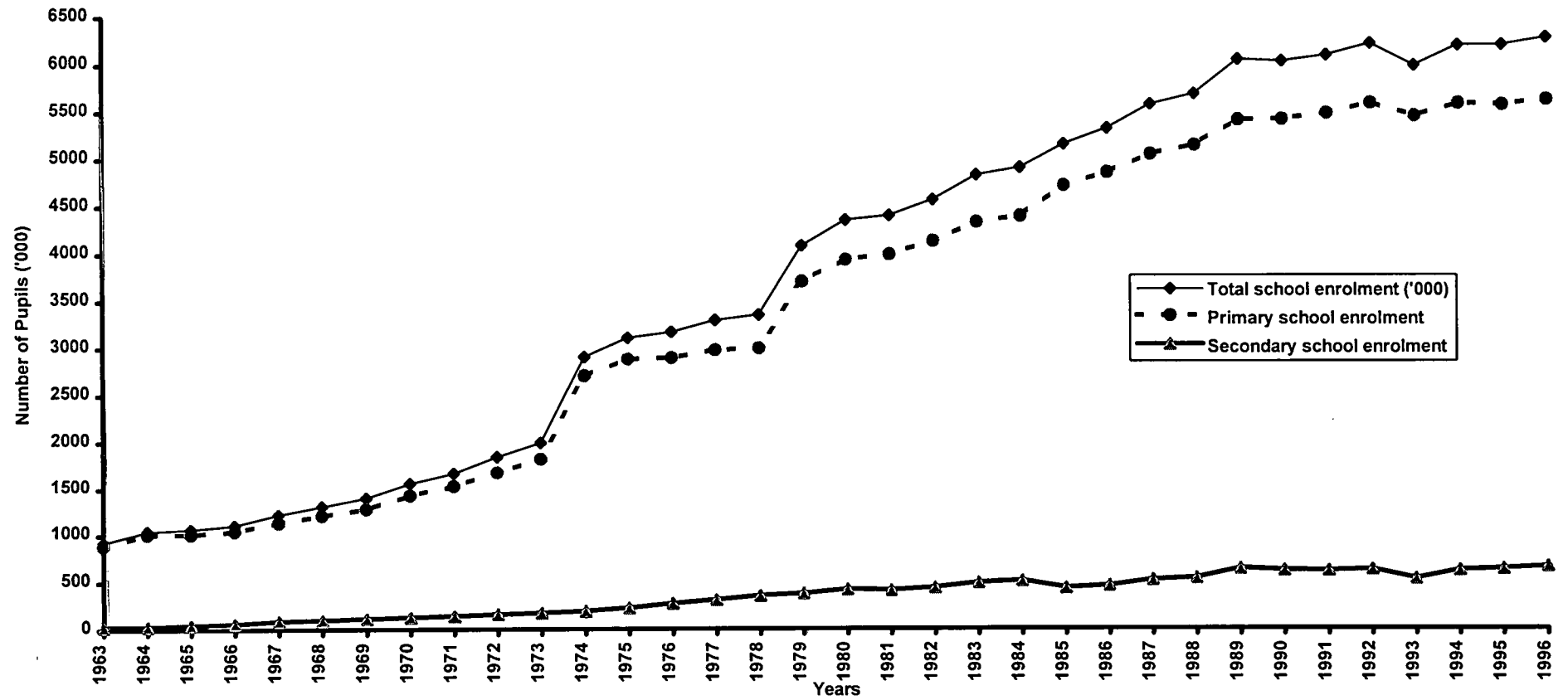
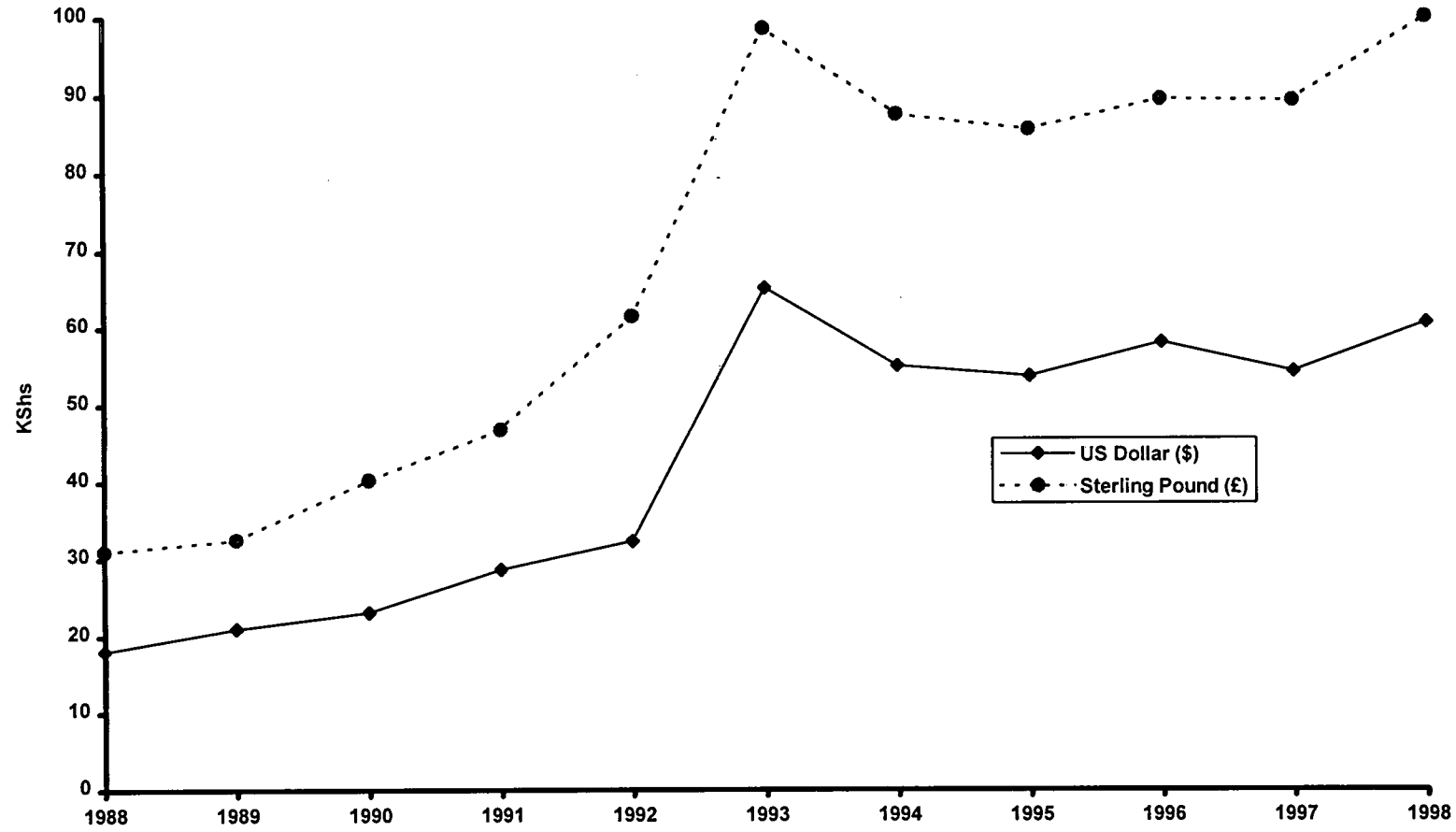
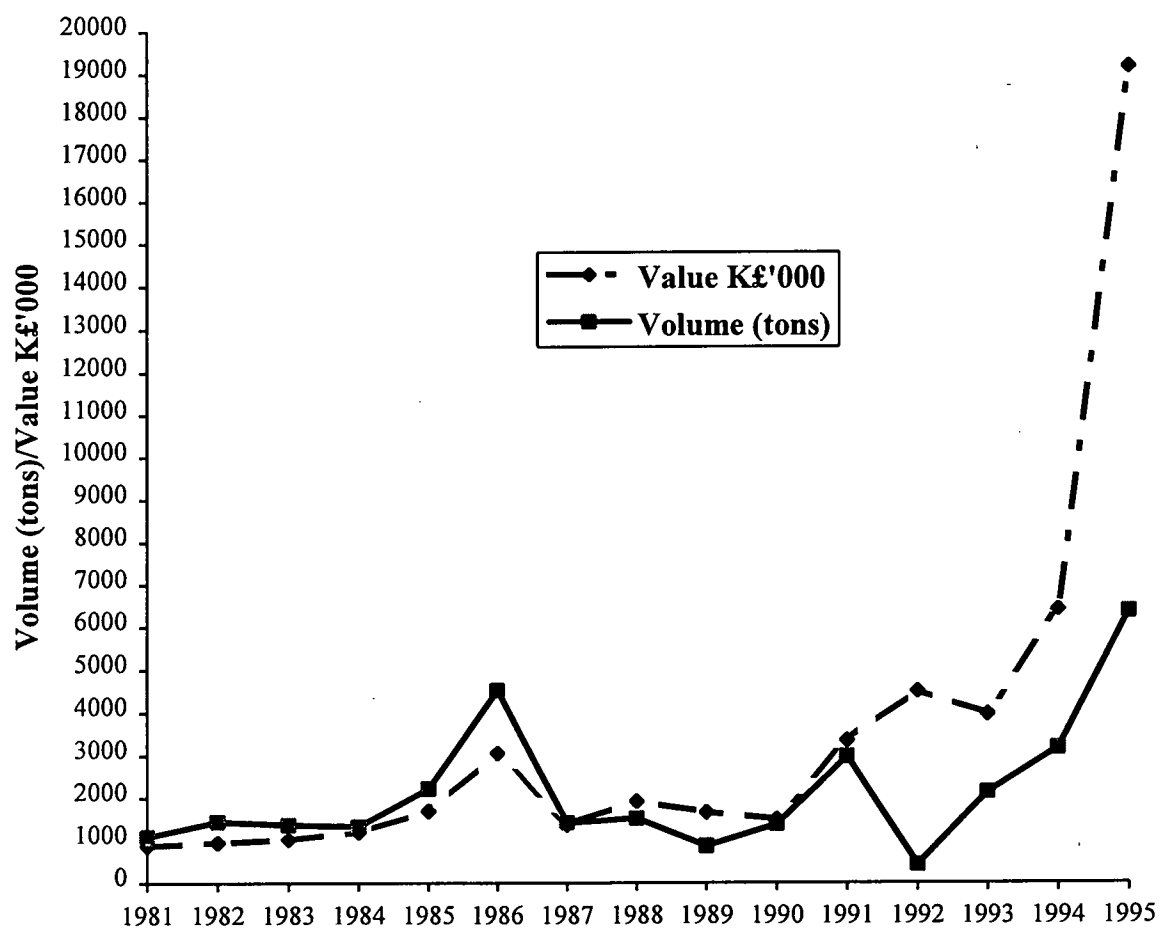


Figure 9.3 New Book Titles Published in Kenya 1963 - 1995





**Figure 9.5 Volume and Value of Imported Printing Paper to Kenya
1981 - 1995**



CHAPTER TEN

CONCLUSIONS AND RECOMMENDATIONS

10.1 Introduction

Throughout the discussions in this study, it has been argued that textbook publishing is not only an economic decision but also a social and political one, and that its growth depends on a creative fusion of these elements. It is therefore important to note from the outset that the recommendations which ought to improve educational publishing should address the political, economic and social factors. As in every state, the boundaries between provision of education and political ideologies are often difficult to define. The state has a duty to educate its citizens for social stability and economic development. Hence the emphasis on numeracy and literacy.

The provision of textbooks to schools has been always a question of who is to provide the finance. The actual production of the textbooks is an economic business affair as substantial financial commitments are needed in order to produce books of an acceptable standard. Those people who decide to venture into educational publishing expect to make a profit out of the business. These factors therefore need to be considered in making conclusions and recommendations that can encourage and make a success of the liberalisation of the textbook market in Kenya.

10.2 Review of Research Objectives

During the start of this study, a number of objectives (set in bold in this section) were set to be investigated. These objectives formed the basis of and determined the way in which the research was carried out. In this section of the chapter, each objective is reviewed to show what the investigation has achieved.

Under the objective of an **investigation of the growth of the market for educational books** there has been some mixed findings. Since independence in 1963, the number of children enrolled and the number of learning institutions in Kenya has increased. This indicated that the potential market for educational books has been on the increase, but the purchasing power has been static or even on

occasions decreased. It was difficult to establish the number of textbook copies sold and print-runs from the publishing houses visited as they considered such information as business confidential. From the case studied textbooks, it is evident that print-runs are very low. The low print-runs showed that publishers were very concerned about the level of sales and could only print what they were able to sell within a given period of time. It was found out that even with textbooks for core subjects like mathematics for primary schools, where the target market population is over 600,000, the print-runs could be on average 120,000 and be sold within two or three years (see section 5.7). However, the number of print-runs of the case studied textbooks had increased over the periods which indicates that the market has been growing. The number of booksellers and other outlets have been showing some signs of growth though with a slower phase. The number of bookshops in Kenya has increased since the government pulled out of textbook distribution in 1984 when the Kenya School Equipment Scheme (KSES) was abolished. However, due to lack of information, it was difficult to establish the actual number of bookshops operating in Kenya. However, the growth of the market for educational books will materialise under market liberalisation only if the customers have a strong purchasing power as the increase in size will only be a potential market.

When examining the **market opportunities for the publishing industry in Kenya**, there are strong indications that publishers can exploit the situation created by a number of policies which have been implemented by the government. The new textbook policy on procurement and production of textbooks implemented in 1999 is a case in point where publishers both private and parastatals can compete in the market on equal terms. The publishers also exploited the opportunity created when the Kenya Institute of Education (KIE) stopped writing textbook manuscripts and handed over to the parastatal publishing houses in 1998. From then on, publishers both private and state-owned publishers could commission their own authors to write textbook manuscripts using the guidelines from KIE.

When the government stopped recommending one core-textbook title per subject per class (1999) and introduced the recommendation of six titles for teachers and parents to choose a core-textbook from, there was another opportunity to be

exploited by the publishers. Publishers and booksellers could use their professional associations (Kenya Publishers Association (KPA) and Kenya Booksellers and Stationers Association (KBSA)) to lobby the government to implement policies that were fair to all the players in the book market.

The trend of educational publishing in Kenya was clearly demonstrated by the study carried out on selected publishing houses. This study established that educational publishing in Kenya has moved from an import dependency to fully local educational publishing. Although the number of titles produced by publishers has been declining, it was clear that the publishing industry has grown to a stage where most of the educational books are published locally with local entrepreneurs being involved in the industry.

When **examining the market aspects and factors that affect the distribution of educational books**, it was established that business activities of other related industries had significantly affected the publishing industry. The distribution and price of paper in Kenya was found to be controlled by very few players which has led to unnecessarily high prices. Although paper is produced in Kenya, most publishers still said they were paying high prices for paper which added a considerable amount to the cost of inputs of the textbook production. The distribution of books was also found to be inadequate in rural areas as most bookshops were situated in urban centres. The communication links between rural and urban areas have also led to lack of information about books amongst those who live in the rural areas.

In examining **the procedures used in the adoption of school textbooks**, it was established that the government, like in any other nation in the world, uses the curriculum centre to evaluate and vet book titles which are to be used in schools. The curriculum centre has involved representatives of various interested bodies in education when vetting and evaluating textbooks. Publishers have to submit their books for vetting to the KIE and they will receive a report with detailed comments about their books.

In **examining the effects of textbook prices in various market category groups**, this study established that teachers and parents were concerned about the high cost

of textbook acquisition. The high prices of textbooks combined with the low incomes of most of the population in Kenya was a factor that has resulted in lower textbook sales. Most of the teachers and parents expressed the view that if textbooks were cheaper they could purchase the textbooks required by their schools and children. This study, therefore, found out that those people who had lower incomes could not afford to purchase textbooks while those with relatively higher incomes were able to purchase textbooks for their children and thereby gain an advantage. This view was sustained when the government carried out a study in 1990 and found out that schools in poorer areas of the country lacked textbooks and learning materials in their schools due to the cost factor.

When **customers views were solicited about school textbooks authored by KIE**, their views were diverse. Most of the textbooks which had been authored by KIE and published by JKF and KLB had been revised by the publishers and customers some customers could not find any difference from other textbooks authored by individual or group authors. In some areas, teachers praised some of the textbooks authored by KIE as comprehensively covering the syllabuses while others were not up to the standard expected.

It was not possible to **relate publishing in Kenya with other countries in Africa** due to insufficient literature and time limitations. Attempts were made and a number of citations have been made in some chapters of this study. However, it is hoped that further research dedicated to comparing the developmental stages of educational publishing will be carried out.

When **investigating the flow of information between publishers and the market place**, it was established that publishers use a number of methods to pass on information about their textbook titles to the market. The channels of information used includes employment of sales representatives who visit schools and have discussions with teachers. The publishers also advertise their books in newspapers and mail posters, calendars and leaflets to schools. However, due to communication problems, most schools in rural areas are not visited by publishers' sales representatives. This, therefore, denies those in rural areas the chances to make informed choices about the books they should purchase due to lack of proper

information. In most cases their source of information is the list of recommended textbooks from the Ministry of Education and Human Resource Development (MOEHRD) which contains only limited information about the textbook titles listed. Some booksellers advertise textbooks and pass on information to customers. Teachers and parents share information about availability of textbooks by word of mouth. This form of communication was paramount in rural areas where parents would ask teachers or other people they consider knowledgeable on textbooks.

The findings of this study has been used to **make recommendations** which are aimed at improving and strengthening the publishing and distribution of educational books in Kenya.

10.3 Education Development

Throughout this study, it has become clear that the trend of education development, which is a key factor that determine the market of educational publishing, has registered a huge growth since independence in 1963. The growth in this case is not only confined to the size of schools established and their enrolments but also to the changes in the curriculum and syllabuses undertaken in those schools. The education policies that are adopted in the school systems are also a potential factor that can potentially change the face of educational publishing.

When the country became independent in 1963, the unification of the various education systems was an opportunity where new textbook materials were required. The various education commissions which were established and came up with recommendations of education changes which affected the publishing industry.

The change of education system from 7-4-2-3 to 8-4-4 in 1984/85 affected the educational publishing in Kenya. This change of system brought about an increase in the number of subjects studied in schools and also a change of curriculum and syllabus content. This was to give a new face in the publishing industry for both the well established publishing houses and newcomers who could start commissioning and publishing of new textbooks. However, the introduction of the new system was done hurriedly and with very limited co-ordination between the Education Ministry and the publishing industry. This led to a mushrooming of publishing houses who

published textbook titles which were of poor quality. In future if there is any change in the curriculum or the education system which will warrant introduction of new subjects and new textbooks, the government and the publishing industry should work together.

The curriculum centre which had been established after amalgamation of various subject advisory centres in 1966 has had the responsibility of developing curricula and syllabuses. The curriculum centre (KIE) was also charged with the responsibility for evaluating textbook titles from publishers to see if the books conform to the curriculum and syllabus guidelines. However, the KIE was later involved in textbook authorship by establishing subject panels to write manuscripts which were delivered to parastatal publishing houses for printing. The same subject panels at KIE were still carrying out their duties of evaluating and vetting of textbooks from the private commercial publishers. When the government decided to author textbooks at KIE and also maintain the role of textbook vetting at KIE, private commercial publishers were not happy. The creation and implementation of the policy was to say the least flawed since it was incomprehensible how one institution could judge fairly its own products against others. The policy was justified by its supporters who maintained that the government needed to control what was taught in schools as well as making books affordable to textbook users. It was a fact that textbooks which were written at the KIE and published by state-owned publishing houses were relatively cheaper as compared to those from private commercial publishers. This was possible since there were no royalties were paid to the contributors. Most of them were teachers who were working on official hours as part of their contracts. The overhead costs which were incurred by the parastatal publishing houses were also minimal and the government grants and subsidies enabled them to produce textbooks at lower costs.

It was established that educational publishers in Kenya do a lot of networking in order to identify authors who are commissioned to write textbook manuscripts. Before, when the parastatal publishing houses used to receive manuscripts from the KIE, there was no need for them to commission authors. When the KIE stopped supplying them with manuscripts, they had to compete with the private commercial

educational publishers in the field in looking for authors to commission. The various publishing houses offer different rates of royalties (between 10 and 20 per cent) in order to attract experienced authors from the market. The only shortcoming faced by the publishers in commissioning authors is that there are no full-time writers, because royalties are not sufficient to support an individual with no other source of income. The authors at times think that publishers make money out of their books while they are being paid low percentages of the sales. It would be better if the publishers could explain to their authors all that publishing entails. The publishers also could do better if they work out how to gain the confidence of their authors by giving them their financial statements as the sales progress.

This study has established that the financing of education by the government which was a priority immediately after independence has been on the decline. This became evident through withdrawal of government textbook purchases and introduction of cost-sharing schemes. Such decrease in the financing of the education sector has had some serious impacts on educational publishing.

10.4 Publishing Industry

The publishing industry in Kenya started with the coming of missionaries in the early 1900. However, there is very little documentary evidence about its growth and development except some scattered literature. It has become evident that most of the publishing activities in the industry as a whole has been in educational or textbook publishing. However, the publishing industry in Kenya was dominated by foreign publishing houses for some time after independence.

When the government realised that most of the textbooks in schools were produced by foreign publishers it established its own publishing houses. This led to the establishment of Jomo Kenyatta Foundation (JKF) and Kenya Literature Bureau (KLB) which were given the monopoly of producing educational textbooks. However, as we have seen, the state-owned publishing houses did not flourish until as late as 1986 when the two publishing houses almost controlled the entire textbook market. The idea of taking control of the decisions of textbook production could have been entirely conceived in good faith so that the books produced reflect

the social and cultural norms of the population. But the way the policy was implemented was not at all good for business practices.

The government's establishment of publishing houses and the priority it gave to them to publish textbooks contributed to the sluggish growth in the educational publishing process in Kenya. It must be remembered that monopolistic or duopolistic business arrangements offer no competitive incentives to trigger any ambitions for those running the business. A business sector or any similar body with no ambitions has little chance of growth and/or a motivation to be creative and take on risks which can improve its functioning and service to its customers. However, with market liberalisation it is possible that the complacency that was deep seated in state-owned publishing could disappear as more publishers will compete for the same textbook market, albeit a relatively stable/static one at present.

The publishing industry in Kenya was therefore put in a situation where most of its energies went into the production of textbooks. The development of curriculum and syllabuses, writing of textbook materials, production, evaluation and purchasing of textbooks were at one time done by the government. In such circumstances, it could be very difficult for one to effectively maintain a standard which could be beneficial to the textbook users.

It appears that when the government (after independence in 1963) realised that most of the textbooks used in schools were from foreign publishers, they exerted control over the development of curricula and syllabus as a right of the state and attempted to do so over book production as well. The curriculum and syllabus guidelines should have been channelled to commercial publishing houses who would have commissioned authors to write the textbooks. The government could also have gone further to encourage the establishment of local educational publishing houses by giving incentives as tax breaks or low interest loans in their initial stages of development. With the establishment of local private commercial publishers assisted by the government, they could have competed with the foreign publishing houses and boosted the development of educational publishing.

Narrowing the number of textbook titles for schools was another barrier which, in effect, hindered the development of educational publishing in Kenya. This policy of restricting the number of subject titles per class could have contributed to the small number of publishing houses in the textbook publishing and, therefore, affecting the number of new titles produced each year. The fact that almost all the titles which were recommended by the government were from a few publishing houses was clearly a discouragement to publishing houses which might have been willing to take risks in the publication of a title in more subject areas.

Educational publishing requires huge investments and involves a lot of risk taking. In cases where the publishers clearly see that there is limited chances of their book titles being selected due to the policies they will not take the risk of publishing. In 1984/85 when the education system changed from 7-4-2-3 to 8-4-4, more publishing houses ventured into educational publishing. This resulted in the high number of new titles produced in 1985/86. The reason was that the textbook recommendation policy which restricted the number of books was not in place. When the government enforced a textbook recommendation policy where only one book title per subject per class was introduced in 1987, the number of new book titles declined. Although there were other factors like poor economic performance which contributed to the decline in book production, the major factor was the change in government policy.

Structural Adjustment Programmes (SAPs) slowed down the publishing industry. The annual income of the population decreased, as was observed by Makotsi and Nyariki (1995).¹ The findings of the present research concur with such conclusions as was shown in the output of titles each year and also copies being sold to schools, since by 1990 when the government carried out a survey on availability of books in schools it was clear that there was a shortage of textbooks. The textbook-buying community has been prioritising how to spend their meagre incomes. The casualty in this has been the publishing industry. This finding supports Chakava (1996)²

¹ Makotsi, R. & Nyariki, L (1995) : *The Book Market in Kenya Today* : Nairobi, Dag Hammarskjöld, 63.

² Chakava, H. (1996) : *Publishing in Africa: One Man's Perspective* : Nairobi, EAEP, 34.

who concluded that little growth is expected in the publishing industry when the purchasing power of the population is low.

In this study, it was discovered also that marketing of textbooks is limited as most of the book titles are only featured in publishers' catalogues. With the introduction of market liberalisation, the textbook market field will be competitive and publishers will have to advertise and market their titles more assertively. The publishers should therefore make sure that textbook users should receive balanced annotated information about their titles so that purchasers can make informed choices in the process of selecting their required texts.

The overall growth of the publishing industry in Kenya is disappointing as is the limited information with which to track it down. If information is available both researchers and the players in the industry can use it to deduce the problems afflicting the industry. Although publishers in Kenya are required by law to submit a copy of any new publication to Kenya National Library Services (KNLS) on depository regulation, most of the publishers do not. This has resulted in a gap in the information flow about the number of new titles being published in Kenya making it difficult for publishers to know which subject areas are over covered. Although publishers may use other information sources such as publisher's catalogues on subject areas published, the Kenya National Bibliography (KNB) could be by far the most appropriate single document which could propagate information from scattered sources.

It was evident from this research that publishers are reluctant to submit their new titles to KNLS since the KNB which contains books published had been for sometime out of print and publishers could not see the reason why they should submit their books. However one problem which has dogged the KNLS - the lack of qualified staff has been solved and by September 1999 the publication of KNB was almost up to date. The government should however realise that it is important to increase the funding of KNLS and the pay of the staff so as to attract more qualified personnel. The publishers should also on their part submit their new titles to KNLS to be included in the KNB. The information available through the KNB

will in effect be useful to publishers in deciding on areas which they can publish which will lead to more development in the publishing industry.

10.5 Textbook Distribution

The distribution network for textbooks is not well developed when compared to developed nations like the UK or the USA. Textbook users can however obtain their textbook copies through bookshops, *dukas* or street stalls in Kenya. There are very few large bookshops in Kenya and the few which are in existence are mostly located in the cities or main towns. The poor development of the textbook distribution network in Kenya could be attributable to the earlier arrangements of distributing textbooks to schools. In 1972 the Kenyan government established KSES which was an arm of the Ministry of Education charged with the responsibility of textbook procurement and distribution. The KSES had its own fleets of trucks which were used to distribute books and other educational materials to all schools in the country. The general public or the private sector were not involved in the distribution of textbooks. When the KSES was abolished in 1984, the book distribution sector in Kenya had limited resources. The existence of the KSES had therefore discouraged would be investors in the textbook distribution market. However, since 1984, there has been a considerable number of bookshops and other bookselling outlets which have been set-up in Kenya.

Apart from bookshops, textbooks also can be accessed by users in both public and school libraries. School collections, however, tend to be housed in cupboards in the classrooms or staff-rooms. The KNLS has a number of branches spread across the country which are visited by school children, teachers and the general public. The KNLS also operates mobile library services (and some box and camel libraries), some specifically tailored for the provision of textbooks. In such cases, those who do not have the purchasing power to acquire their own books benefit from such services.

This study has also come to the conclusion that unless the textbook users have strong purchasing power, textbooks accessibility is very difficult. The purchasing power of most Kenyan households is very weak and textbook prices are generally

high. The development and growth of educational publishing depends on the number of textbooks sold by publishers. Failure to expand the sales market could restrict the industrial growth potential.

Since most textbook consumers in Kenya have very limited purchasing power, the introduction of cost-sharing in schools led to a textbook shortage. This, in turn, led to the introduction of social dimension programmes by the government in 1991. The programme was to fund purchasing of textbooks by the government with the aid of some foreign donors and NGOs. The books were for schools in Arid and Semi-Arid Lands (ASAL) and Pockets of Poverty (POP) areas. This was to alleviate shortage of textbooks and improve their accessibility.

These conditions epitomise the dilemma of educational planning. If the skills and literacy of an individual are essential to the social capital of a nation, then the education of individuals cannot be left to competition alone. If so, then the weakest are deprived and excluded. But, if the government fails to deliver the service required it should set conditions for the private sector to try its hand.

The government need to widen and increase the funding of the social dimension programme. In order to improve textbook and book distribution especially in rural areas, the government should encourage schools to purchase their books from local book outlets and that could only be possible if the government makes money available to individual schools. This should be implemented in a way that will cut the bureaucratic red tape typical of government departments. To curb mismanagement and embezzlement of funds meant for textbook purchasing, prudent auditing measures should be put in place in all the districts.

In view of the high cost of textbooks which has led to limited textbook purchases by textbook users, there is need for the government to waive taxes levied on all components used in textbook production. Publishers who were interviewed expressed the view that the prices of the essential ingredients in the book production make textbooks expensive. In order to improve and promote accessibility of textbooks to the users, the prices of textbooks should be brought to a level which the customers can afford but also making sure that the publishers make a profit. One of the things which can be implemented by the government is to

eliminate or reduce taxes on paper, printing equipment, computers and other essential equipment and materials used by educational publishers. The government also can go further and introduce tax rebates to educational publishers depending on the number of textbooks they have produced. The tax rebates should be calculated to cover all taxes paid by the publishers on any items which has been associated with the production of textbooks.

10.6 Summary of Conclusions

The educational publishing industry in Kenya has faced numerous problems which have affected its growth. The problems stem from government policies and of late the globalisation of the economy through the introduction of wider market liberalisation, SAPs from the World Bank and the requirements of the IMF. The imposition of economic policies by the IMF and World Bank on the government of Kenya has fuelled problems which were already facing the publishing and educational sector in Kenya.

The movement towards liberalisation of the economy led to the devaluation of the Kenyan currency and rising inflation affected the educational publishing sector. The cost sharing schemes which were introduced by the government in the education and health sectors made matters worse as the majority of the population in Kenya live on a hand-to-mouth basis. The population therefore had to prioritise on what to purchase and almost without exception, the priorities are the basic necessities of life (food, shelter and clothing).

However, it is envisaged that the problems brought on by market liberalisation will not be too long lasting. On an optimistic note, the tenets of wider market liberalisation are supposed to make organisations more efficient by encouraging competition. In the textbook market, efficiency is what is paramount and competition among the players would set a base for future efficient players in the market. Where there is competition, the customers in most cases are almost guaranteed of quality products as opposed to what could often occur under a monopolistic environment.

In the Kenyan situation, the textbook market liberalisation will enable the KIE to concentrate more on the vetting and evaluation of textbooks since they will no longer be involved in textbook writing. Both private and state-owned publishers involved in textbook publishing will be competing against each other on equal terms.

Since the educational publishing market is directly linked to the educational institutions as its market, government policies on education also affect the growth of the publishing industry. The changes which have taken place in the education institutions in Kenya such as levels of enrolments, number of subjects taught, the curriculum and the emphasis on examinations have had their effects on the publishing industry. The changes made to the education system in 1984/85 in Kenya did have an effect as the number of new published titles increased (see p. 229). The low enrolments in schools in the 1990s naturally produced a setback in the potential market of the educational publishing industry. These macro-economic factors have been shown to be significant. In future, policy must support activities to eliminate their negative effects.

10.7 Practical Recommendations

Since the number of schools and the population of those enrolled is the main market for educational books, it is recommended that the government implement policies that will boost school enrolments. The enrolment in schools in Kenya has been on a decline due to the economic difficulties faced by parents. Those who have been affected most are people in rural areas (the ASAL regions - mostly pastoral communities) and also people in POP areas in more developed areas of the country. In order to solve this problem, the following are recommended:

- that the government (with the help from outside donors and NGOs) need to provide funds for establishing libraries in schools.
- In ASAL areas where people still practice pastoralism, efforts should be made to provide boarding facilities in schools in order to boost pupil enrolments. The cost of such facilities should be met by the government and NGOs both local and international.

The scheme should also be extended to POP areas where people are experiencing economic difficulties. The government re-introduced direct purchasing and free distribution of textbooks to schools (a scheme similar to KSES) in 1991/92 after realising that there were shortages of textbooks in schools. Most parents in Kenya could not afford to provide basic necessities for their children and at the same time meet the school requirements for their children.

The growth of educational publishing in Kenya under market liberalisation will be expanding and promising only if the end consumers have stronger purchasing power. There is need also for co-operation between the publishers and the government and, more so, the Curriculum Centre.

- The government and the publishers, both private and parastatals, need to open lines of communication which can be effectively used on matters concerning the curriculum, with efficient feedback mechanisms. These could take the form of establishing standing committees that can hold annual conferences to present their evaluation and progress to the other parties in the industry.
- It is recommended also that KPA lead in establishing of annual seminars for teachers and other interested parties in educational publishing where publishers can commission authors, and teachers and other educationists can address their concerns on textbook publishing and distribution.

The growth of educational publishing depends on the successful distribution of the books to reach the widest market possible. Since most of the distribution outlets (mostly bookshops) are located in the main cities and urban areas, those who live in rural areas are disadvantaged in accessing textbooks.

- It is recommended therefore business entrepreneurs who wish to stock and sell books in rural areas be helped and encouraged by the government and the publishing houses by adopting appropriate policies. For a start, the publishing houses need to allow such entrepreneurs considerable trade discounts and extend longer credit periods on their purchases.

- The publishers could also go a step further and make agreements with booksellers which will allow them to return back book copies which have not been sold as long as they are in good condition.
- The government on their side need to establish low interest rate loan schemes that can be given to entrepreneurs wishing to sell textbooks in rural areas.

The low interest rate credit scheme is very important if the textbook distribution is to be even in all parts of the country. Such scheme has been used in funding other small scale businesses in other sections of the economy and there is no reason why it should not be extended to bookselling.

10.8 Further Research

Inevitably, a research project such as this should raise as many questions as it answers. This has been the case in this study of educational publishing in Kenya. Accordingly, some lines of further research can be identified.

- It was difficult to establish the exact number of publishing houses who were and are in business in Kenya on a year by year basis. It is therefore highly recommended that further research be carried out in future along these lines, so as to show a clearer picture of the growth of publishing houses in Kenya. Such a study could be developed to establish a database identifying location, business characteristics, economic performance and other factors. Such a resource would enhance possibilities for modelling, understanding growth processes and for developing a strategic forward look for the industry.
- A similar study could be made of bookselling outlets by location, business characteristics and economic performances. Such a study would enhance the knowledge of publisher and/or publishing activity in general.
- Due to difficulties of access and the dispersed nature literature, it was not possible to obtain a clear view for comparative purposes of educational publishing from other African countries. It is recommended that in future, research dedicated to comparing educational publishing industries be encouraged and carried out. The present study may provide a suitable model

and methodology for such work. This would build on the policy research and other studies carried out by Altbach, Zell, ADEA, Chakava and other analysts.

- It is also recommended that research be carried out to evaluate the effects and impact of the social dimension programmes in Kenya on educational publishing. This would indicate possible areas of public-private collaboration against the background of market liberalisation.
- Since most publishers in the study were concerned about the prices of paper, it is recommended that studies be carried out to monitor the extent to which paper prices affect the pricing of textbooks and to what extent the distribution arrangements of the local manufactured paper contribute to the effects experienced. Other elements of the manufacturing and production processes would also need to be reviewed.
- The distribution of educational books in rural areas in Kenya is still at a disappointing level. In future a study could be carried out to establish how the distribution of textbooks can be improved within the context of the social dimensions and as a contribution to equalising access to resources and improving educational effectiveness.
- This study established that access to capital for investment was a major problem in the publishing and distribution of educational books; there is need for research into how such problems can be addressed and solved.
- The investigation has shown that in spite of what other factors limit or encourage educational publishing in Kenya, the fundamental issue of lack of purchasing power is and will continue to be critical. As the industry is being liberalised, some steps need to be taken to maintain focus on the purchasing power constraint. There is scope for policy and action based resource to maintain and review the aspect of educational publishing process. If incomes in general fail to rise and if publisher competition fails to effect price reduction, there may be no other alternative to state intervention. Further research may at least contribute to well informed decision making.

The overall aim of the present investigation has been to add to what is already known about educational publishing in Kenya and Africa at large. It is hoped that some contribution has been made and that the recommendations made in this study will have some influence on future activities and policies in the field.

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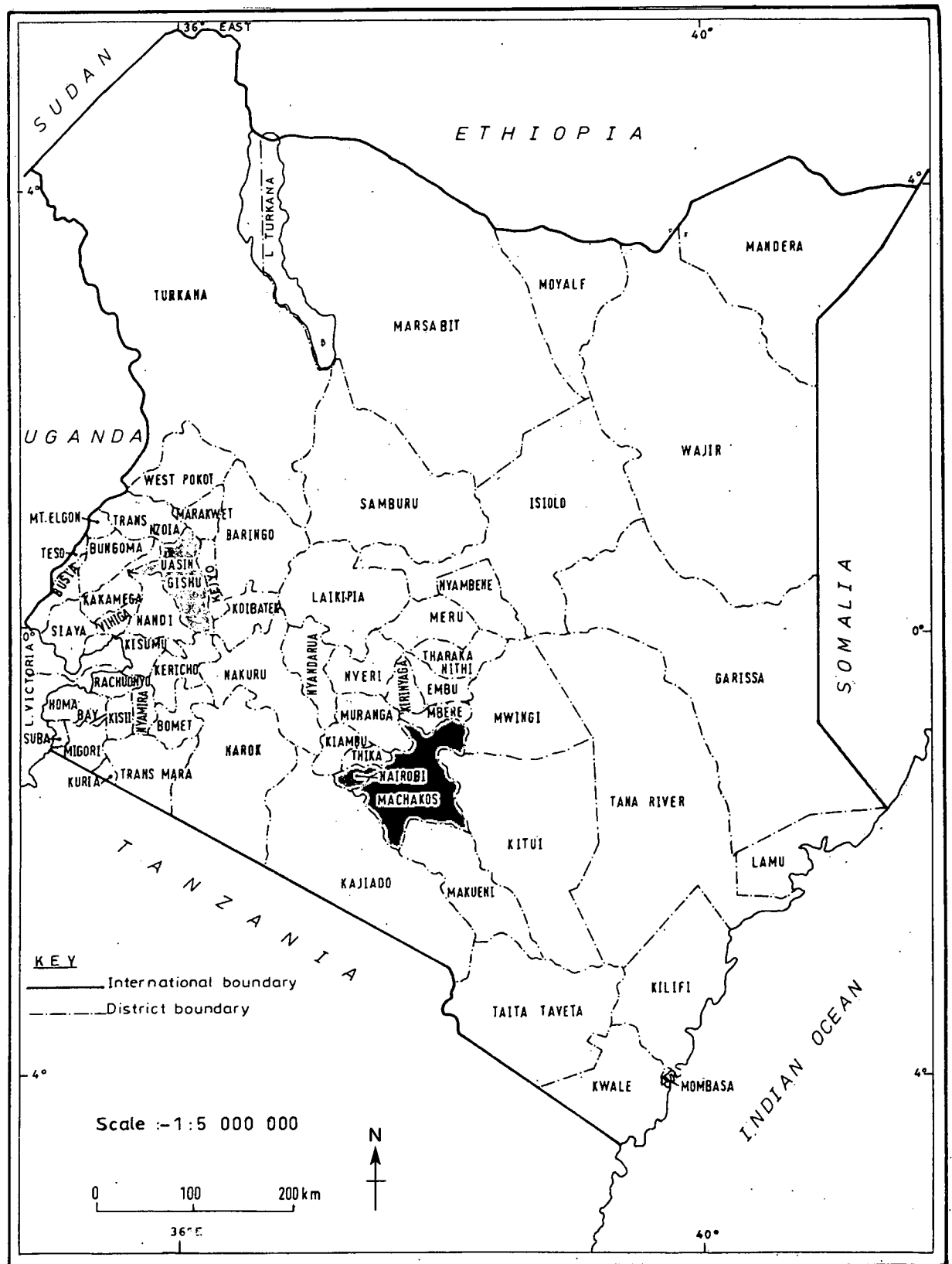
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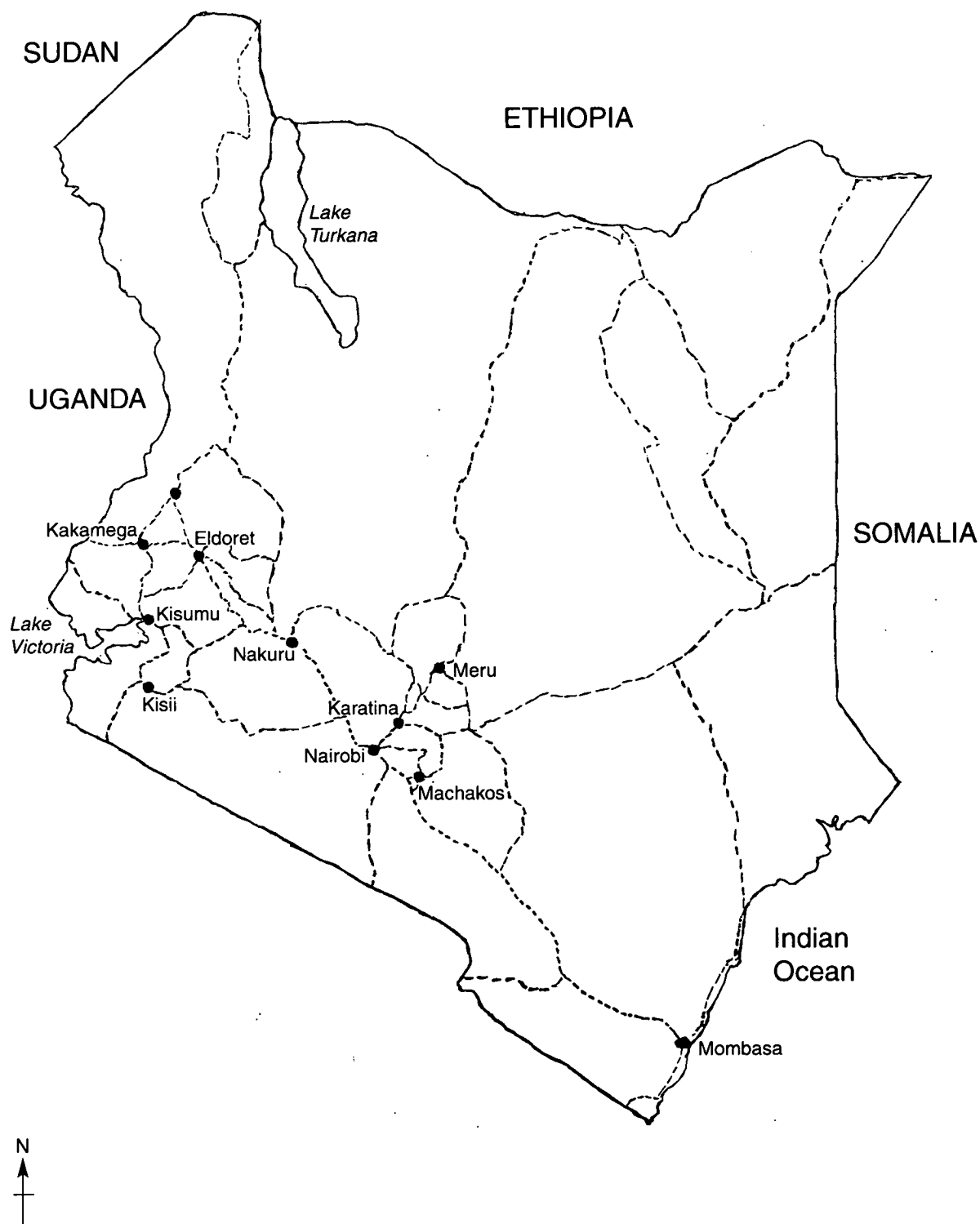
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- WORLD BANK (1995) : *World Development Report: Workers in an Integrating World 1995* : New York, OUP.
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- ZELL, H. (1998) : The Production and Marketing of African Books: A Msungu Perspective. *Logos*, Vol. 9, Issue 2, 104-108.

APPENDIX 1: MAP OF KENYA LOCATION OF AREAS SELECTED



Source: Department of Resource Surveys and Remote Sensing

APPENDIX 2: MAP OF KENYA MAJOR ROADS AND JKF DISTRIBUTION DEPOTS



Source: Department of Resource Surveys and Remote Sensing

APPENDIX 3

LIST OF SOME EDUCATIONAL PUBLISHERS IN KENYA

ISBN	Name and Address	Subjects Published
9966-860	AIC Kesho Publications, PO Box 30351, Nairobi	Christian Religious Education
9966-48	Bible Society of Kenya, PO Box 72983, Nairobi	Christian Religious Education
9966-840	Booksales (K) Ltd, PO Box 20377, Nairobi	Commerce, Business Education
9966-890	Dhillon Publishers Ltd PO Box 32197, Nairobi	Business Education, Commerce
9966-20 9966-850	Evangel Publishing House PO Box 28963, Nairobi	Christian Religious Education
9966-882	Focus Publications Ltd PO Box 48328, Nairobi	Social Ethics
9966-836	Gaba Publications PO Box 4002, Eldoret	Christian Religious Education, Social Ethics
9966-852	Gideon S. Were Press, PO Box 10622, Nairobi	Christian Religious Education, History
9966-46	EAEP PO Box 45314, Nairobi	Kiswahili, GHC, English, History, Christian Religious Education, Home Science, Science, etc.
9966-868	Horizon Books PO Box 47186, Nairobi	Geography, GHC, Mathematics, English
9966-856 9966-9971	Islamic Foundation, PO Box 30611, Nairobi	Islamic Religious Education
9966-884	Jacaranda Designs Ltd. PO Box 76691, Nairobi	Art, Reading, Pre-school books
9966-858	Jemesik Cultural Books Ltd, PO Box 67346, Nairobi	Music, Christian Religious Education, Art and Craft

9966-22	JKF, PO Box 30533, Nairobi	Mathematics, Commerce, Business Education, English, Art and Craft, GHC, etc.
9966-44	KLB, PO Box 30022, Nairobi	Home Science, Kiswahili, Physics, Chemistry, Biology, Art and Craft, English, History, etc.
9966-847	Lake Publishers and Enterprises, PO Box 1743, Kisumu	Art and Craft, GHC
9966-49	Longhorn Kenya Ltd, PO Box 18033, Nairobi	English, Geography, Mathematics, History, etc.
9966-885 9966-945	Macmillan Kenya Publishers Ltd, PO Box 30797, Nairobi	Kiswahili, GHC, Art and Craft, Sciences, etc.
9966-846	Nairobi University Press PO Box 30197, Nairobi	History, Geography, English Literature
9966-28	N.A. Saleemi Publications, PO Box, 22566, Nairobi	Commerce, Accounting, Business Education
9966-47	Phoenix Publishers Ltd. PO Box 18650, Nairobi	English Literature, English Language, Mathematics
9966-919	Savanis Book Centre PO Box 42157, Nairobi	History, GHC, Mathematics, Biology
9966-870 9966-9842	Shirikon Publishers PO Box 46154, Nairobi	Commerce, Business Education
9966-43	Soma Group Ltd PO Box 30162, Nairobi	Mathematics, GHC, English language etc.
9966-839	Standard Textbooks Graphics and Publishing, PO Box 31355, Nairobi	History, Mathematics, Geography, GHC
9966-940	Transafrica Press PO Box 48239, Nairobi	History, Mathematics, Music, etc.
9966-855	Uzima Press Ltd. PO Box 48127, Nairobi	Christian Religious Education
9966-871 9966-9848	Wainaina Educational Books PO Box 8362, Nairobi	Kiswahili, Mathematics, Mother tongue

APPENDIX 4
RESEARCH CLEARANCE LETTER



OFFICE OF THE PRESIDENT

PROVINCIAL ADMINISTRATION AND INTERNAL SECURITY

Telegraphic Address: "RAIS"

Telephone: Nairobi 227411

When replying please quote

Ref. No. OP 13/001/28c 126/2
and date

P.O. Box 30510

Nairobi

6th August 1998

✓ Daniel C. Rotich
Moi University
P. O. Box 3900
ELDORET

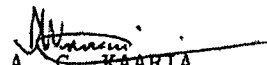
Dear Sir,

RESEARCH APPLICATION

Following your application for authority to conduct research on "The Market for and Distribution of Educational Books in Kenya: The foundations of Growth. I am pleased to let you know that your application has been considered and approved.

Accordingly you are authorised to conduct research in Nairobi and Uasin Gishu Districts as from August 1998 to August 2000. You are advised to pay courtesy call on the Provincial Commissioner Uasin Gishu before embarking on your research project.

This office expects to receive two bound copies of your final research report upon completion of your research project.


A. G. KAARIA
for: PERMANENT SECRETARY/
PROVINCIAL ADMINISTRATION

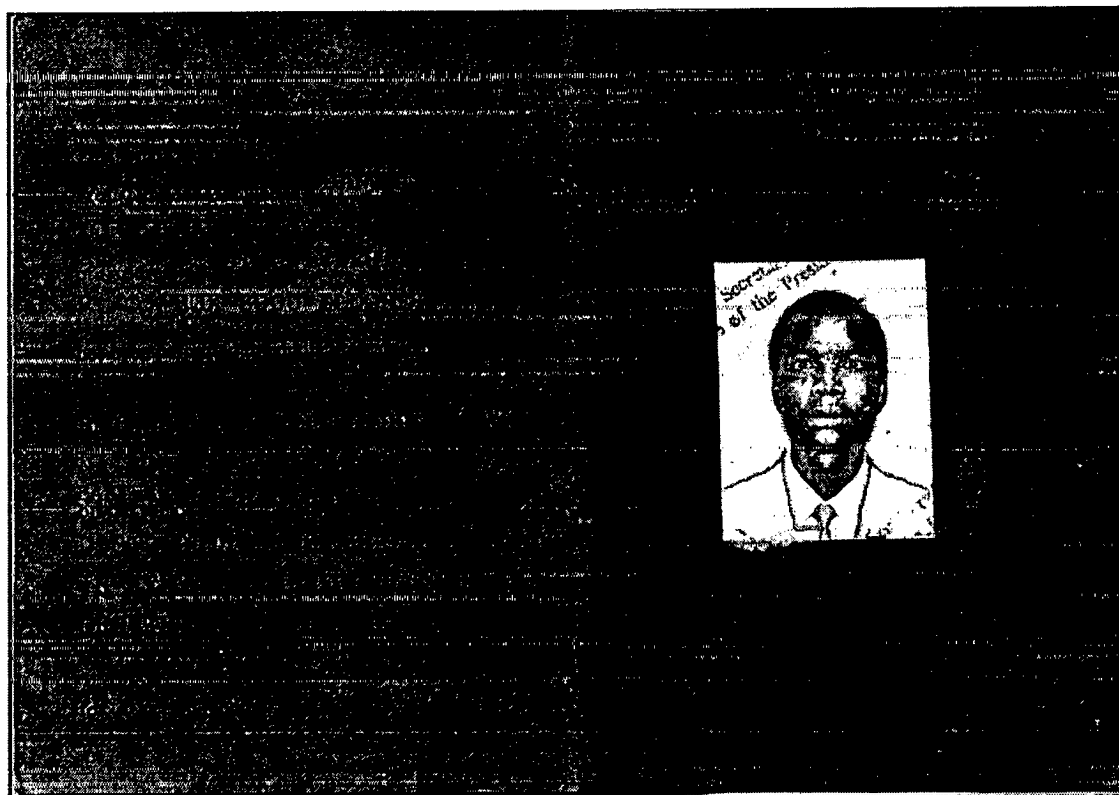
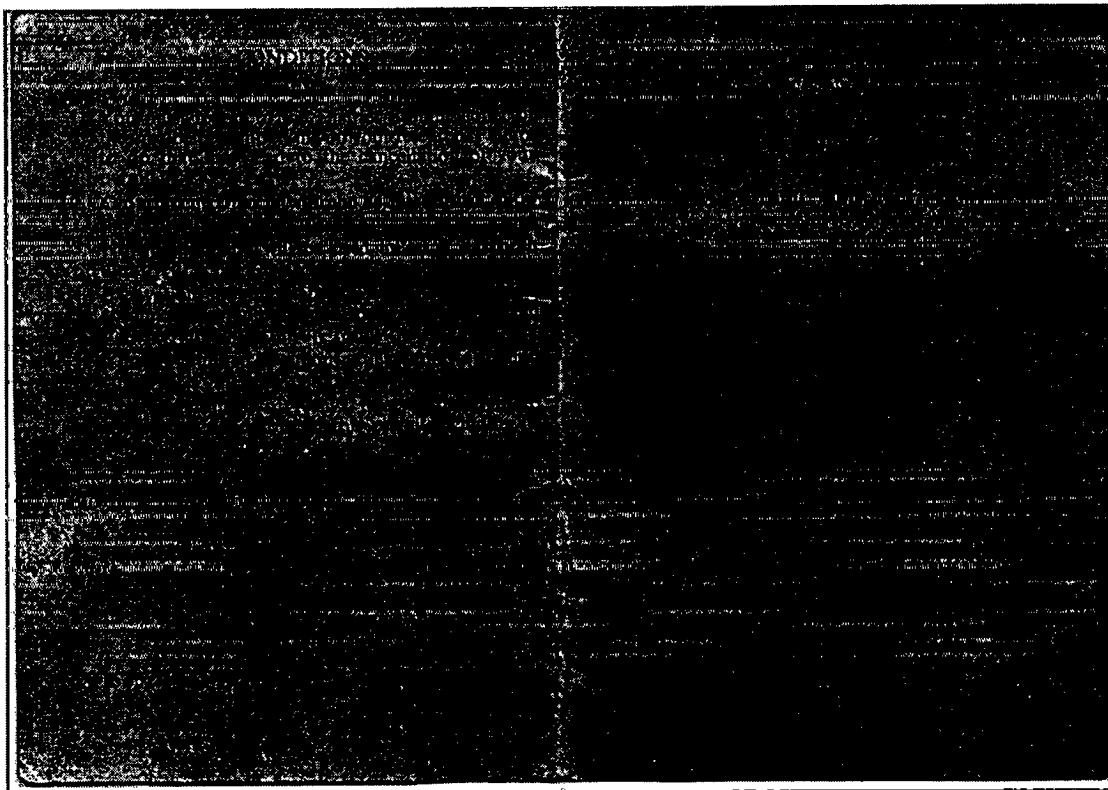
cc.

Provincial Commissioner
NAIROBI

District Commissioner
UASIN GISHU

APPENDIX 5

RESEARCH CLEARANCE PERMIT



APPENDIX 6
LETTER FROM NAIROBI CITY COUNCIL EDUCATION DEPARTMENT

NAIROBI CITY COUNCIL



TELGRAMS "SCHOOLING"
TELEPHONE: 224281
EXT: 2426 / 2590

CITY HALL ANNEXE
P.O. BOX 30298
NAIROBI

EDUCATION DEPARTMENT

Ref. No. GL/NC.141 VOL IV/10

9th September, 1999

The Headteachers
Nairobi City Council Primary Schols
NAIROBI

RE: RESEARCH AUTHORITY

You are hereby asked to provide all the necessary assistance to Chebutuk Rotich of Moi University, Department of Publishing and Book Trade, who is conducting a research on "Educational Publishing in Kenya".

This is especially for schools he may select.

Chief Adviser to Schools

F. L. SONGOLE
CHIEF ADVISER TO SCHOOLS
FOR: DIRECTOR OF CITY EDUCATION

FLS/lwm

c.c. Divisional Advisers.

APPENDIX 7
LETTER FROM MACHAKOS DISTRICT EDUCATION OFFICE

MINISTRY OF EDUCATION, SCIENCE AND TECHNOLOGY

Telegrams: "SCHOOLING" Machakos
Telephone: Machakos 200701
When replying please quote

DISTRICT EDUCATION OFFICE
P.O. Box 28
MACHAKOS

Ref. No. MKS/ED/A/120/III/57
and date

14th September, 1999

TO WHOM IT MAY CONCERN

The bearer of this letter, Mr. Daniel Chebutuk Rotich is a lecturer at Moi University. He is conducting a research on educational publishing. Him or his research assistants have authority to visit the following schools:


Primary Schools

1. A.I.C Makutano Girls Boarding
2. Machakos Academy
3. Kisukioni Primary
4. Athi River K.M.C Primary
5. Muumandu Primary
6. Kathiani Primary

Secondary Schools

1. Mumbuni High School
2. Star Sheikh Girls Secondary School
3. Matungulu Girls Secondary School
4. Kabaa High School

Please co-operate with him.



F. M. MUNYEKE
FOR: DISTRICT EDUCATION OFFICER
MACHAKOS

↓
**DISTRICT EDUCATION
OFFICER MACHAKOS**

APPENDIX 8

TEACHERS AND PARENTS QUESTIONNAIRE

Title: Publishing and Distribution of Educational Books in Kenya: a Study of Market Liberalisation and Book Consumption

This interview questionnaire is being administered by Mr. D. C. Rotich or his agent. Mr. Rotich is a Lecturer in the Faculty of Information Sciences, Moi University and is undertaking a doctoral research degree based on the above title. The purpose of this task is to gather information about marketing, distribution and consumption of textbooks under market liberalisation in Kenya for the thesis. You are requested to spare a few minutes of your time schedule to help in answering the following questions.*

1. Name (optional)

2. Sex

Female

Male

3. Your age:

Under 29 years

30 - 39 years

40 - 49 years

Over 50 years

4. Your residential place

name division

Uasin Gishu (Eldoret)

Machakos

Nairobi

5. Please state your occupation

6. Your average monthly income

Under Kshs 5000.00

Kshs 5001 - 7999.00

Kshs 8000.00 - 14,999.00

Over Kshs 15,000.00

7. Do you have the following in your home?

Radio

Television

Yes	No

8. How often do you read a Daily Newspaper?

Daily

Occasionally (about once a week)

Not at all

9. Your level of education

Never attended school

Attended more than one year of primary school

Primary school graduate

Secondary/High school graduate

College Certificate/Diploma graduate

University graduate

10. a) Have you bought a textbook in the last twelve months?

Yes

No

Go to Q. 11

b) When you bought your last textbooks, did you buy more than one textbook title?

Yes

No

c) Where did you buy your last textbook(s)?

Local duka (shop selling general provisions)

Bookshop in the local market centre

Bookshop in the nearest town

Others (specify) _____

1 book	more than 1 book

11. a) Is there a bookshop(s) in your nearest market centre/town/estate shopping centre?

Name of Centre

Yes

No

I don't know

} Go to Q. 12

b) If yes, how many bookshops (those selling books and stationery)

12. How frequently do you buy textbooks

More than once every term

Once every term

Once a year

Not at all

Go to Q. 21 if a teacher otherwise terminate the interview

13. a) Do you always get all the textbook titles you need in the place you bought your last title?

Yes

No

Go to Q. 14

b) If No, what do you think should be done by the publishers to make textbooks locally available?

.....

.....

.....

.....

....

14. About how many books do you have in your home?

None

Under 10

10 to 50

Over 50

Go to Q. 16

15. Of these books about how many are textbooks?

All of them

Half of them

Less than Half

None

16. What do you think about the prices of textbooks in general

Very cheap

Right price

Expensive

Very expensive

17. How much on average do you expect to pay for;

A primary school textbook

Kshs

A secondary school textbook

Kshs

18. What are your comments on the following titles?

Title	Bought in the last 12 months		If Yes, What do you think about the price?			
	Yes	No	Very cheap	Right price	Expensive	very expensive
1. Masomo ya Msingi bk. 7 (pupil's) by T. K. & Z. Zani						
2. Primary Mathematics Pupils' bk. 4 by KIE						
3. Macmillan Art & Craft std 6 by Njagi & Berlutti						
4. Certificate Geography F. 2 by Kubasu & Karuggah						
5. God meets us: CRE form 4 by R. Kerre						
6. Secondary Home Science form 1 by KIE						
7. Commerce students' book 3 by KIE						

19. What were your reasons for purchasing these particular books instead of other titles (applicable to the title(s) purchased only - use numbers corresponding to titles for answers)

.....

.....

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20. How do you get to know about the availability of a specific textbook title in the bookshops?

.....

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.....

The following questions are applicable to teachers only

21. Name of the school he/she teaches

22. Which subjects do you teach (list them)

.....

23. Which of these books have you used in class or bought for your child (those who have children in their household attending school)?

	Used in class	bought for child
1. Masomo ya Msingi book 7 Pupil's by T. K. & Z. Zani		
2. Primary Mathematics Pupils' book 4 by KIE		
3. Macmillan Art & Craft standard 6 by Njagi & Berlutti		
4. Certificate Geography form 2 by Kubasu & Karuggah		
5. God Meets US: CRE form 4 by Kerre		
6. Secondary Home Sciences form 1 by KIE		
7. Commerce student's book 3 by KIE		

24. To what extent do you think these titles cover the stipulated syllabus

	strongly inadequate	inadequate	adequate	strongly adequate
1. Masomo ya Msingi book 7 (pupil's) by T. K. & Z. Zani				
2. Primary Mathematics pupils' book 4 by KIE				
3. Macmillan Art & Craft standard 6 by Njagi & Berlutti				
4. Certificate Geography form 2 by Kubasu & Karuggah				
5. God meets us: CRE form 4 by Kerre				
6. Secondary Home Sciences form 1 by KIE				
7. Commerce student's book 3 by KIE				

25. What are your comments about the textbooks recommended by the curriculum centre (KIE) to be used as textbooks?

.....
.....
.....
.....
.....

26. a) Does your school have a library where textbooks used during class lessons are kept?

Yes

Go to 26 b.

No

Go to 26 c.

b) If Yes, who buys the textbooks for the school?

.....
.....
.....

c) If No, where do you get books used during class lessons?

.....
.....
.....

27. How often do publishers' sales representatives visit your schools?

More than once in a term

Once in a term

Once in a year

Not at all

28. What do you think about the information you receive from the publishers about the textbooks?

Very inadequate

Inadequate

Adequate

More than adequate

29. a) **Have you been consulted by the Ministry of Education about the textbooks recommended for use in your subject area?**

Yes

No

Go to Q. 30

b) **If Yes, what was the nature of the consultation**

.....

.....

.....

.....

.....

30. **What do you think the Ministry should do before coming out with a list of recommended textbooks?**

.....

.....

.....

.....

.....

31. **Are there any other comments you would like to make?**

* Thank you very much for your co-operation

APPENDIX 9

INTERVIEWS WITH THE PUBLISHERS

GUIDING QUESTIONS

A: General Information

1. Name of the Organisation:
2. Name of the Person Interviewed:
3. Position/Post held in the Organisation: -----

B: Subject areas Published and Authors

4. What subjects areas of the national curriculum does your organisation publish for primary and secondary level?
5. How do you go about in identifying competent and experienced authors?
6. Do you experience difficulties in the process of identifying and commissioning authors for writing textbook manuscripts?
7. In the subject areas you publish, do you have competing titles from other publishers?

C: Paper and Printing Industry

8. Where do you print your textbooks?
9. [If there is a printing press owned by the publishing house], where do you purchase your printing paper?
10. What are your views on the locally produced paper and imported paper on the following;
 - a)Price?
 - b)Availability?
 - c)Quality?
11. What comments do you have on V.A.T levied on printing paper and other consumable products used in textbook publishing?

D. Marketing and Distribution

12. What strategies are being employed in the company in competing with other publishing houses

13. Most of the people in Kenya have low incomes and at times complain that textbooks are very expensive, what strategies do the company employ in order to make textbooks cheap without affecting the profitability of the company?
14. What are the strategies employed by the company in order to make your books available in all parts of the country in the right time when books are needed?
15. What comments to you have about the book distribution sector in Kenya?

E: Capital Investments

16. What is the situation at the moment on financial accessibility from commercial banks?
17. What is your average annual turnover and about what percentage is that from textbook sellers?

Thank you for your co-operation.

APPENDIX 10

LIST OF INTERVIEWEES[§]

1.	Mr. W. Buyela	Inspector of Schools	MOEHRD
2.	Mr. H. Chakava	Managing Director	EAEP
3.	Mr. J. Githenji	Publishing Manager	KLB
4.	Mr. S. Karani	Deputy Publishing Manager	JKF
5.	Mr. J. Kiarie	Regional Marketing Manager	OUP
6.	Mr. O. Kiminza	Head Research and Evaluation	KIE
7.	Mrs. M. Khasiani	Chief Editor	KLB
8.	Mr. W. Khavuchi	Sales and Marketing Manager	EAEP
9.	Mr. D. Muita	Managing Director	Macmillan (K) Publishers
10.	Mr. K. Mukundi	Science Editor	KLB
11.	Mr. J. K. Muraya	Marketing Manager	KLB
12.	Mr. N. Muriuki	Editorial Manager	OUP
13.	Mr. D. Ng'ang'a	Editor	Macmillan (K) Publishers
14.	Miss E. Ng'eno	Reference and Bibliographic Librarian	KNLS
15.	Mr. J. Njeru	Acquisition Librarian	KNLS
16.	Mrs J. Njoroge	Managing Director	Longhorn Kenya Ltd
17.	Mr. O. Odhiambo	Officer	KIE
18.	Mr. D. Rono	Chief Inspector of Schools	MOEHRD
19.	Mr. D. Sang	Deputy Inspector of Schools	MOEHRD

[§] The names of teachers and parents interviewed are not included.

20.	Mr. C. D. Shah	General Manager	Text Book Centre
21.	Mr. D. Sosion	Publishing Manager	Longhorn Kenya Ltd
22.	Mr. J. Wamae	Director	Chania Bookshops

APPENDIX 11

LIST OF SCHOOLS VISITED

Name of School	District
A.I.C Kaptagat Preparatory	Uasin Gishu
A.I.C. Makutano Girls Boarding Primary	Machakos
Athi River K.M.C. Primary	Machakos
Consolata Primary	Nairobi
Consolata Secondary	Nairobi
Eldoret Preparatory	Uasin Gishu
Harambee Primary	Nairobi
Hill School Secondary	Uasin Gishu
Huruma Primary	Uasin Gishu
Kabaa High School	Machakos
Kapsoya Secondary	Uasin Gishu
Kathiani Primary	Machakos
Kisukioni Primary	Machakos
Machakos Academy	Machakos
Matunda Primary	Uasin Gishu
Matunda Secondary	Uasin Gishu
Matungulu Girls Secondary School	Machakos
Moi Avenue Primary	Nairobi
Moi Educational Centre	Nairobi
Moi University Primary	Uasin Gishu
Mumbuni High School	Machakos
Muumandu Primary	Machakos
Plainsview Primary	Nairobi
Pumwani Secondary	Nairobi
St. Brigid's Primary	Nairobi
Star Sheikh Girls Secondary School	Machakos

Testimony Secondary
Township Primary
Westlands Primary

Uasin Gishu
Uasin Gishu
Nairobi