

The Economic Contribution of Copyright-Based Industries in Tanzania



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The Economic Contribution of Copyright-Based Industries in Tanzania

Report for
World Intellectual Property Organization (WIPO)

By

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Acronyms

AVI	Audiovisual Institute
BAMVITA	Book Development Council of Tanzania
BBC	British Broadcasting Corporation
BSAT	Booksellers Association of Tanzania
BEKE	Bantu Education Kinema Experiment
BOT	Bank of Tanzania
BRELA	Business Registration and Licensing Agency
CMO	Collective Management Organization
CNN	Cable News Network
COI	Central Office of Information
COSOTA	Copyright Society of Tanzania
DDC	Dar-es-Salaam District Council
DTTB	Digital Terrestrial Television Broadcasting
EU	European Union
GDP	Gross Domestic Product
GVA	Gross Value Added
ICT	Information and Communication Technology
IP	Intellectual Property
ISIC	International Standards of Industrial Classification
KOPITAN	Reproduction Rights Society of Tanzania
MCT	Media Council of Tanzania
NBS	National Bureau of Statistics
NDSI	Non-Dedicated Support Industries
n.e.c	Not Elsewhere Classified
NUTA	National Union of Tanganyika Workers
RTD	Radio Tanzania Dar-es-Salaam
TBC	Tanzania Broadcasting Corporation
TBS	Tanzania Broadcasting Service
TCRA	Tanzania Communications Regulatory Authority
TFC	Tanzania Film Company
TIN	Tanzania Identification Number
TRA	Tanzania Revenue Authority
TUKI	Taasisi ya Uchunguzi wa Kiswahili (Institute of Kiswahili Research)
TZS	Tanzania Shilling
UDA	Usafiri Dar-es-Salaam (Public Transport in Dar-es-Salaam)
UNESCO	United Nations Educational, Scientific and Cultural Organization
VA	Value Added
WCT	WIPO Copyright Treaty
WIPO	World Intellectual Property Organization
WPPT	WIPO Performances and Phonograms Treaty

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Dickson Nyariki

Summary

Copyright and related rights industries, also called copyright-based industries, are a component of what are usually referred to as the creative industries. These are economic activities based on the creation, management, use of and trade in original creations expressed in tangible form. They are intangible assets made up of a bundle of exclusive economic rights to do certain acts with original works or other copyright subject-matter. There has recently been increased interest in copyright due to the growing recognition of its role, which goes beyond the view that it is simply focused on providing legal protection and a working environment conducive to creative activity. This has been demonstrated by the number of studies conducted to quantify the contribution of copyright-based industries in several countries in Europe, America, Asia and Africa. Copyright involves a significant economic impact at both the business and national levels; enhanced understanding of the economic contribution of copyright would enable governments to have an increased focus on mainstreaming copyright-based industries in their development policies.

The main objective of this study was to quantify the economic contribution of copyright-based industries in Tanzania by estimating their value-added contribution to GDP, share of national employment, and revenue generated from foreign trade. In addition, the study aimed at providing material to assist in the formulation of adequately informed policies in order to improve the operation of the creative sector in the country. The WIPO Guide (2003) was used as a methodological basis for this research. The Guide classifies the copyright-based industries into core, interdependent, partial, and non-dedicated support industries (NDSIs). The study depended mainly on secondary data covering the years 2006-07 to 2009-10. The main sources of these data were government departments and other related organizations, including the National Bureau of Statistics (NBS), Tanzania Revenue Authority (TRA), Business Registration and Licensing Agency (BRELA) and the Copyright Society of Tanzania (COSOTA), which is the only collective management organization (CMO) that also serves as a copyright office.

This study has generally demonstrated that copyright-based industries in Tanzania make a significant contribution to the national economy. The copyright-based industries generated in 2007-2010 an added-value of between TZS 391.635 and TZS 680.990 billion respectively, translating to a contribution of 3-4.6% to the gross domestic product (GDP). They also generated TZS 38.930 billion and TZS 83.686 billion as income to employees, or a proportion of 2.8 and 5.2% of the total national economic value, and employed 28,202 and 44,331 people, or 4.5 and 5.7% of the total national workforce. In terms of GDP contribution, the copyright-based industries generally performed better than hotels and restaurants, and the mining and quarrying sectors. In fact, the core copyright industries alone contributed more to the national economy than the mining and quarrying sectors in 2009 and 2010 (3.2% and 2.8% respectively), underscoring the important role these industries play in Tanzania.

The results of this Tanzania study were generally consistent with similar studies in Kenya and most other countries. Tanzania's core copyright industries made a contribution of 3.2% of the GDP in 2009. This performance was better than that in 11 studies of countries over various years – including Croatia (3%), Singapore (2.9%), Latvia (2.9%), Lebanon (2.5%), the Russian Federation (2.4%), and Kenya (2.3%). Tanzania also performed well with regard to employment contribution by the core copyright industries, recording a value of 2.6%, and placing the country above seven other countries – Romania (2.4%), Bulgaria (2.3%), Lebanon (2.1%), Jamaica (1.8%), Colombia (1.7%), Kenya (1.2.) and Ukraine (1.2%).

Among the disaggregated copyright industries, the partial industries contributed a proportionally greater value of exports over imports compared with the total national exports and imports in 2009, which were 3.9% and 0.8% respectively. For the rest of the copyright industries, however, this result was the reverse. Furthermore, the copyright-based industries had a relatively high import component, predominantly within the interdependent category, resulting in a reduction in value-added figures. This last result is similar to that of Kenya, implying that the structures of external trade in the two countries are somewhat comparable.

The current study was commissioned by WIPO upon request from the Government of Tanzania, in light of the increasing importance of copyright-based goods and services to the economy. It is expected that the results of the study will serve as an important input in prompting the government to act by strengthening policies that will go a long way to support the growth and development of the copyright-based sectors in the country.

1. Introduction

1.1 Background

Copyright and related rights industries (hereinafter referred to as copyright-based industries or simply copyright industries) are “creative industries”. These are described as economic activities based on the creation, management, and use of and trade in original creations expressed in tangible form. UNESCO defines creative industries as those industries that combine the creation, production, and commercialization of contents that are intangible and cultural in nature. These industries have contents that are protected by copyright and they can take the form of goods or services.

A further distinction exists between creative/copyright industries and cultural industries. While creative industries are industries that are dependent on one’s skills, and copyright industries are a subset of the former, cultural industries are culture-based and mostly depend on government funding.

As noted above, copyright is an intangible asset, and is made up of a bundle of exclusive economic rights to do certain acts with original works or other copyright subject-matter. These include the rights to publish, copy, communicate and publicly perform the copyright material. Examples of works covered by the copyright law include literary and artistic works such as novels, poems, plays, films, musical works, drawings, paintings, photographs, sculptures and architectural designs.¹

There has been an increased interest in copyright in the recent past due to the growing recognition of its role, which goes beyond the view that it is simply focused on providing legal protection and a working environment conducive to creative activity. Copyright has a significant economic impact both at the business and national levels. As a result of the increased understanding of the value of copyright, governments have an increased focus on mainstreaming copyright-based industries in their development policies. The increase in interest in this area is a result of several specific factors, including:

- There has been increased recognition of the role of intellectual property (IP) in post-industrial society, where more attention is being paid to non-material production factors.
- The scope of copyright protection has widened as a result of digital technology, which has increased the economic gains from different technology-based products and services.
- Because of the digital revolution, copyright-protected material has been recognized as one of the main components in electronic commerce and digital transactions.
- There has been a strong realization that creativity is the basis for the social, economic and cultural growth of nations.

The current study is one of a series of national studies on the economic contribution of copyright-based industries (37 at the time of the completion of the current study). So far, five countries in Africa have been involved in these studies: Kenya, Malawi, Nigeria, South Africa and Tanzania. Of these, Kenya was the first African country to have successfully completed the study, which has been published by both the Government of Kenya and WIPO.²

These studies have generally demonstrated that copyright-based industries make a significant contribution to national economies. Taking Kenya as an African example, copyright-based industries in 2007 contributed over 5% of the country’s GDP. As a percentage of GDP, this contribution was higher than that of the agricultural sector, education, or healthcare. The contribution of Kenya’s copyright-based industries also compared reasonably well with those of other countries outside Africa that had conducted similar studies earlier, such as

¹ World Intellectual Property Organization (WIPO) (2003). Guide to Surveying the Economic Contribution of the Copyright-Based Industries. WIPO, Geneva.

² 1. Nyariki, D., Wasonga, O., Otieno, C., Ogadho, E., Ikutwa, C. and Kithinji, J. (2009). The contribution of copyright and related industries to Kenya’s national economy: A study based on the WIPO Guide. Government of Kenya, Nairobi.
2. Nyariki, D., Wasonga, O., Otieno, C., Ogadho, E., Ikutwa, C. and Kithinji, J. (2011). The economic contribution of copyright-based industries in Kenya, in WIPO, National studies on assessing the economic contribution of the copyright-based industries. WIPO Publication No. 1024e, WIPO, Geneva.

Hungary and even Singapore. In fact, Kenya's industries outperformed those of Colombia, Jamaica, Bulgaria, Mexico and Ukraine.

No wonder, then, that the copyright-based sectors are attracting increasing scrutiny from economists worldwide, as the industry players become more aware of the value of this intangible asset. The interest from lawyers has also expanded, leading to a widening of the scope of the copyright laws in these countries. Furthermore, copyrighted materials are fast emerging as one of the main components in electronic commerce and digital transactions, with products such as music being deemed essential for ring-tones, etc.

The Tanzanian study is based on the WIPO Guide (2003), and is the first of its kind in the country. The motivation behind researching the economic contribution of copyright-based industries in Tanzania is to make policymakers aware of the economic importance of these industries. This is expected to encourage the mainstreaming of copyright-based industries in the development policies of Tanzania. In the light of the increasing importance of copyright-based goods and services to the economy, the Government of Tanzania requested WIPO's assistance in facilitating this study. The results will provide input that can be used to improve the policy framework for the operation of the creative sector in the country. In addition, the results of this study will serve as an important input in promoting the growth and development of the copyright-based sectors in the country.

1.2 Objectives of the Study

The main objective of this study was to assess the economic contribution and performance of selected copyright-based industries in the national economy of the United Republic of Tanzania by estimating the value they add to GDP, share of national employment, and revenue generated from foreign trade. The study was carried out in close coordination and with the support of the Business Registration and Licensing Agency (BRELA) and WIPO.

Apart from estimating the economic roles of the copyright industries, this study also aimed to analyze the national market structure, value chain, supply and demand patterns, the labor market, policy framework, support from the public and civil sectors (including the roles of the Copyright Society of Tanzania (COSOTA) and other copyright-related organizations), financing mechanisms and implications of the digital environment.

The study proposes policy, strategy and institutional interventions for encouraging the growth and development of copyright-based industries in Tanzania.

1.3 Structure of the Study

This study is structured in seven parts:

- The first part consists of an introduction and a presentation of the objectives, structure and scope of the study.
- The second part presents an overview of the legal copyright framework in Tanzania.
- The third part describes the methodological approaches in collecting and analyzing data, including identification and classification of copyright-based industries in Tanzania. It also presents the copyright factors used and a comparison of Tanzania's industry coding system with that of the International Standard Industrial Classification (ISIC Rev. 3.1) as provided in the WIPO Guide (2003).
- Part four discusses the results of the analysis of the economic contribution of copyright-based industries, adapting the general guidelines presented in the guide to the Tanzanian situation, in terms of value added generated by copyright-based industries, their contribution to employment generation, and income from the various copyright-based sub-sectors.
- The fifth part consists of a discussion of the international trade in copyright-based industries.
- Part six compares the Tanzanian study and similar studies in other countries carried out previously on the basis of the WIPO Guide.

- Part seven provides a description of the development of the main core copyright-based industries in Tanzania.
- The final part presents the conclusions of the study and policy recommendations.

1.4 Scope of the Study

The general scope of this study is to quantify the economic contribution of copyright-based industries in Tanzania in the year 2009, for which the latest economic data have been recorded in government books. However, earlier years and 2010 government projections have been considered in trend analyses of various aspects of the industries. The aggregate data covered Mainland Tanzania. Obtaining data from Zanzibar was too challenging to allow inclusion in this analysis. It is, however, presumed that Zanzibar's contribution to the copyright industries is relatively small and would not in any major way alter the conclusion of this study.

The United Republic of Tanzania was established on April 26, 1964, after the unification of two sovereign states, namely Tanganyika (now known as Mainland Tanzania) and the Island of Zanzibar. Before the union, both countries had earlier received their independence from Britain. The political capital of Tanzania is Dodoma, where the parliament sits, while Dar-es-Salaam is the commercial capital. Dar-es-Salaam is also the educational nerve center of Tanzania, and the main entry port of the country. Zanzibar is more linguistically homogenous and is dominated by exclusively Swahili-speaking communities.

The study approach followed the following steps:

- Identification of the copyright-based industries to be studied, using Annex I of the WIPO Guide as a reference, as well as the selected copyright-based industries, of which more detailed analysis was undertaken.
- Categorization of copyright-based industries into core, interdependent, partial and non-dedicated copyright industries, based on the WIPO Guide.
- Undertaking data collection, mainly from secondary sources, and filling in data gaps using questionnaires and (where appropriate) extrapolation, interpolation or projections.
- Compilation of data by industry class as defined in the WIPO Guide, and disaggregating them to the required level of detail.
- Measurement and calculation of the contribution of the industries studied, including value added figures for the national total GDP, employment, employee income and foreign trade, using a selected approach under the WIPO Guide. This estimation covered the size of the industries measured against macro-economic variables – GDP, employment, and income.

2. Tanzania's Legal Framework for Copyright

2.1 Intellectual Property (IP) Rights

IP rights in Mainland Tanzania are administered by two agencies. One is the Business Registration and Licensing Agency (BRELA), which deals with industrial property consisting of patents, trade and service marks, industrial designs, geographical indications of origin, undisclosed information (trade secrets) and integrated circuits topography. The second is the Copyright Society of Tanzania (COSOTA), which is both a copyright office and a collective management organization (CMO). COSOTA's function is the protection of copyright and neighboring rights, under the Copyrights and Neighbouring Rights Act (1999). The protection covers literary and artistic works such as novels, poems, plays, films, musical works, drawings, paintings, photographs, sculptures and architectural designs. Rights related to copyright include those of performing artists in their performances, producers of phonograms in their recordings, and broadcasters in their radio and television programs.

BRELA and COSOTA are under the supervision of the Ministry of Industry and Trade. Other agencies and institutions involved in enforcing IP are the Fair Competition Commission (FCC), which is also under the Ministry of Industry and Trade, the Judiciary (District Court, Resident Magistrates Court and the High Court), Police, Customs, and the Ministry of Agriculture.

IP rights in Zanzibar are administered by the Office of the Registrar of Trademarks and Patents, which is under the Ministry of State in the President's Office responsible for Constitutional Affairs and Good Governance in the Zanzibar Revolutionary Government.

2.2 Origin and Scope of IP Law

The history of industrial property laws dates back to the colonial era. Since Tanganyika and Zanzibar were British colonies, the laws of the United Kingdom were extended to Tanganyika and Zanzibar. Changes to these laws were effected after independence.

Similar to the industrial property laws, the history of copyright dates back to the colonial era, during which The Copyright Ordinance, Cap 218 (August 1, 1924), was introduced as an extension of the United Kingdom (Imperial) Copyright Act (1911). After independence, the Copyright Ordinance was replaced by the Copyright Act No. 61 (1966), which was in turn replaced by the current Copyright and Neighbouring Rights Act No. 7 (1999) (CAP 218 RE 2002).

The parent law governing copyright industries in Tanzania, the Copyright and Neighbouring Rights Act No. 7 (1999), established COSOTA to act as a copyright office and CMO, as a bridge between the authors and users. In the implementation of the parent Copyright Act, COSOTA is supported by the following regulations:

- The Copyright (Licensing of Public Performances and Broadcasting) Regulations 2003.
- The Copyright and Neighbouring Rights (Registration of Members and their Works) Regulations, 2006.
- The Copyright and Neighbouring Rights (Production and Distribution of Audio and Audio-Visual Recordings) Regulations, 2006.

Other Acts that support the work of COSOTA are given in Box 1:

Box 1: Other Acts that Support COSOTA

- | | |
|--|--|
| <ul style="list-style-type: none">• The Patent Registrations Act (Cap 217 RE 2002).• The Tanzania Investment Act (Cap 38 RE 2002).• The Trademarks Ordinance (Cap 394 RE 2002, 1957).• The Merchandise Marks Act (Cap 85RE 2002).• The Trade Marks Ordinance (1922).• The Protection of New Plant Varieties (Plant Breeders' Rights) Act No 22 (2002).• The Fair Trade Practices Act (1999). | <ul style="list-style-type: none">• The Tanzania Commission for Science and Technology Act (CAP 226 RE 2002).• The Tanzania Engineering and Manufacturing Designs Organisation Act (Cap 176 RE 2002).• The Tanzania Industrial Research and Development Organisation Act (Cap 159 RE 2002).• The Centre for Agricultural Mechanisation and Rural Technology Act (Cap 181 RE 2002).• The Small Industries Development Organisation Act (Cap 112 RE 2002). |
|--|--|

Sections 9 and 10 of the Parent Act and the regulations listed above protect copyright works, including the production and publishing of books, pamphlets and other writings, computer programs, the provision of lectures, addresses, sermons and similar works, productions of dramatic arts and musical works (vocal and instrumental, and whether or not they include accompanying words), choreographic works and pantomimes, cinematographic and other audiovisual works.

Other works that are protected by copyright laws include drawings, paintings, architecture, sculpture, engravings, lithography and tapestries; photographic works including works expressed by processes analogous to photography; works of applied art, whether handcrafted or produced on an industrial scale, illustrations, maps, plans, sketches and three-dimensional works relative to geography, topography, architecture or science; translations, adaptations, arrangements and other transformations of literary and artistic works; collections of literary and artistic works, such as encyclopaedias and anthologies; collections of expressions of folklore and compilations of data or databases which, by reason of the selection and arrangement of their contents, constitute intellectual creations; and works inspired by the expression of folklore.

Section 9 of the Parent Act accords the author exclusive rights to carry out or to authorize acts in relation to: the reproduction of the work; distribution of the work; rental of the original or a copy of an audiovisual work, a work embodied in a sound recording, in a computer program, in a database, or in a musical work in the form of notation, irrespective of the ownership of the original or copy concerned; public exhibition, translation and adaptation of a work; public performance of a work; broadcasting of a work; other communication to the public of a work; and importation of copies of a work.

The author of a protected work has the moral right to claim authorship of his work, in particular that his authorship be indicated in connection with any of the acts referred to in economic rights, and to object to and to seek relief in connection with any distribution, mutilation, or other modification of, and any other derogative action in relation to, his work, where such action would be or is prejudicial to his honor or reputation. This is what is referred to as the moral right.

The Parent Act, Section 5(3), ensures that works shall be protected irrespective of their form of expression, their quality and the purpose for which they were created. This means that registration is not a prerequisite for protection.

2.2.1 Duration of Author's Rights

Section 14 of the Parent Act states that the economic rights of the author shall be protected during the life of the author, and for a period of 50 years after the author's death. In case of a work of joint authorship, the economic and moral rights shall be protected during the life of the last surviving author and for a period of 50 years from his death.

In the case of a work published anonymously or under a pseudonym, the economic and moral rights shall be protected for 50 years from the date on which the work was either first made available to the public or first published, whichever date is the latest, provided that the author's identity is revealed or is no longer in doubt before the expiration of the said period. In the case of audiovisual works, the economic and moral rights

shall be protected for 50 years from the date on which the work was either made, first made available to the public, or first published, whichever date is the latest. In the case of a work of applied art, the economic and moral rights are protected for 25 years from the making of the work.

2.2.2 Expressions of Folklore

Sections 24 to 30 of Part III of the Parent Act protect the expressions of folklore and provide that the National Arts Council of Tanzania is in charge of protecting expressions of folklore, including:

- Folktales and folk poetry.
- Riddles.
- Folk songs and instrumentals.
- Folk music.
- Folk dances, plays and artistic forms of rituals.
- Production of folk art, in particular drawings, paintings, carvings, sculpture, pottery, terracotta, mosaic, woodwork, metalware, jewellery, baskets and costumes.
- Traditional musical instruments.

2.2.3 Protection

Sections 31 to 35 of Part IV of the Parent Act provide for the protection of works produced by the author. They state that, regarding his performance, a performer has the exclusive right to carry out or to authorize:

- Broadcasting or other communication to the public.
- The fixation of an unfixed performance.
- Reproduction of a fixation of a performance in any manner or form.
- The first making available to the public of a fixation or copies thereof, through sale or other transfer of ownership.
- Rental to the public.
- Public lending of a fixation.
- The making available to the public by wire or wireless means.

It further states that a producer of a sound recording has the exclusive rights to carry out or to authorize:

- Reproduction of a sound recording in any manner or form.
- The first making available to the public.
- Rental to the public.
- Public lending of a copy.
- The making available to the public by way of wireless means.

A broadcasting organization has exclusive rights regarding its broadcasts to carry out or to authorize:

- Re-broadcasting.
- The communication to the public.
- Fixation of its broadcast.
- Reproduction.

This protection begins the moment something is broadcast and lasts until the end of the 50th calendar year following the year in which the broadcast, publication or performance took place.

In addition, Section 44 of Part VI of the Parent Act provides protection against acts of circumvention.

2.2.4 Enforcement

Sections 36 to 43 of Part III of the Parent Act provide for the enforcement of the Act. Some of the responses to a breach of the laws are:

- Injunction.
- Payment of any damages.
- Destruction and similar measures.
- Right of delivery.

Any person who knowingly violates, or causes to be violated, the rights protected under the Parent Act shall be liable to:

- A fine not exceeding more than TZS 5 million or imprisonment for a term not exceeding three years, or both, for the first offense if the infringement was on a commercial basis.
- A fine not exceeding TZS 10 million or imprisonment for a term not exceeding five years, or both, for each subsequent offense if the infringement was on a commercial basis.

Any person who, without the authorization of the competent authority, imports or distributes copies of expressions of folklore derived from Tanzania or copies of translations, adaptations, arrangements or other transformations of such expressions of folklore, made abroad without the authorization of the said authority, is guilty of an offense and shall be liable to a fine not exceeding TZS 10 million or imprisonment for a term not exceeding 10 years.

Any person who gives authorization on behalf of performers without being a duly appointed representative, or any person who knowingly proceeds under such an unlawful authorization, shall be guilty of a criminal offense punishable by a fine not exceeding TZS 5 million or imprisonment for a term not exceeding three years.

For any other criminal offense under copyright infringement, the penalty shall be:

- A fine of not more than TZS 4 million or imprisonment for up to three years for the first offense.
- A fine of not more than TZS 8 million or imprisonment for up to two years for each subsequent offense.

2.3 Challenges of Applying Copyright Laws

The execution of Tanzanian copyright law is faced with many challenges. These include the following:

- An outdated law and regulations.
- The copyright office and CMO are placed under one office instead of the copyright office regulating the CMO.
- Lack of resources.
- Lack of public awareness.
- Piracy.
- Low penalties in the current copyright law.
- Lack of training of law enforcers including judicial, police and customs officers.
- Corruption.
- Absence of a national IP policy.
- Absence of a Copyright Tribunal.
- Weak coordination among artists.
- Weak coordination among enforcement agencies.

2.4 Economic Dimensions of Copyright Law

Tanzania's copyright industries are fast emerging as key components of the economic development of the country. Many young people are earning a living from their involvement in these industries. However, this fact has not been adequately studied and quantified, which is the main reason why the Government of Tanzania has placed an emphasis on this study.

As already noted, studies have shown that the protection of copyright works encourages people to be involved in these industries by affording them opportunities to improve their returns, thereby increasing government earnings. The protection of these works has also encouraged investors to invest in these sectors, in turn creating valuable employment for the creators of such works. For example, many engage in importing the materials used in music production and film production, thus creating a value chain that contributes to economic growth. However, Tanzania is not party to the WIPO Copyright Treaty (WCT) or to the WIPO Performances and Phonograms Treaty (WPPT). This comes with disadvantages, including the inability to protect works by Tanzanians exploited abroad, and the reduction in earnings from artists' works consumed outside Tanzania, especially in the context of the digital environment.

3. Methods of Analysis and Data

3.1 Identification and Classification of Copyright-Based Industries

The initial step towards evaluating the economic contribution of copyright-based industries is to identify the industries themselves. The study strictly followed the WIPO methodological guide of 2003 in identifying and classifying these industries in Tanzania. According to the recommendations of the guide, there are four main categories of copyright-based industries:

- Core copyright-based industries.
- Interdependent copyright-based industries.
- Partial copyright-based industries.
- Non-dedicated support industries (NDSI).

The works of the copyright-based industries listed above carry different weights in different sectors of the economy. According to the WIPO Guide, the core copyright-based industries are considered to be completely composed of copyright-protected creative works. The interdependent copyright-based industries constitute industries whose products are consumed jointly with the products of the core copyright industries. Because of resource constraints and time, it is sometimes not possible to conduct surveys to determine the exact copyright contribution of interdependent industries. The copyrighted products of the partial and non-dedicated copyright-based industries are only partly represented. The NDSIs in manufacturing may have no copyright components at all, but distribution industries in NDSIs may have some components.

3.1.1 *Sub-Sectors of Core Copyright-Based Industries*

As mentioned earlier, core copyright-based industries are those industries whose works are wholly or totally based on copyright-protected creative works. These industries in Tanzania can be disaggregated further into several sub-industries or activities, which, according to the WIPO Guide, are:

- Press and literature.
- Music, theatrical productions and operas.
- Motion pictures and video.
- Radio and television.
- Photography.
- Software and databases.
- Visual and graphic arts.
- Advertising services.
- Copyright collecting societies.

3.1.2 *Sub-Sectors of Interdependent Copyright-Based Industries*

According to the WIPO Guide, interdependent industries are defined as industries that are engaged in the production, manufacture and sale of equipment, the function of which is wholly or primarily to facilitate the creation, production or use of copyright works and other protected subject matter.

This group of industries can be broken down into:

- Manufacture, wholesale and retail of interdependent industries.
- Manufacture, wholesale and retail (sales and rental) of computers and equipment.
- Manufacture, wholesale and retail (sales and rental) of musical instruments.
- Manufacture, wholesale and retail (sales and rental) of photographic and cinematographic instruments.
- Manufacture, wholesale and retail (sales and rental) of photocopiers.
- Manufacture, wholesale and retail of blank recording materials.
- Manufacture, wholesale and retail of paper.

3.1.3 *Sub-Sectors of Partial Copyright-Based Industries*

Partial copyright-based industries are industries in which only a specific proportion of their production is associated with products protected by copyright and related rights. The ratio is indicated by a copyright factor, which shows what percentage of the product is under the protection of copyright. The following industries fall in this category, according to the WIPO Guide (2003):

- Apparel, textiles and footwear.
- Jewellery and coins.
- Other crafts.
- Furniture.
- Household goods, china and glass.
- Wall coverings and carpets.
- Toys and games.
- Architecture, engineering, surveying.
- Interior design.
- Museums.

3.1.4 *Sub-Sectors of Non-Dedicated Copyright-Based Industries*

The NDSIs are those in which a portion of their activities is related to facilitating the broadcast, communication, distribution and sale of products and works and other protected subject matter, and whose activities have not been included in core copyright industries. According to the WIPO Guide (2003), the following industries fall into this category:

- General wholesale and retailing.
- General transportation.
- General telephony.

For more clarity, Table 1 summarizes the various copyright-based industries included in each category in the survey of this study.

Table 1: Copyright-Based Industries in Tanzania

I. Core Copyright-Based Industries	II. Interdependent Copyright-Based Industries
Press and literature	Cassette players, electronic game equipment * other similar equipment
Music, theatrical productions, opera	Musical instruments
Motion pictures and video	Manufacture, wholesale and retail of interdependent industries
Radio and television	Photographic and cinematographic instruments
Photography	Blank recording material and paper
Visual and graphic arts	
Advertising services	
Collective Management Society	
III. Partial Copyright-Based Industries	IV. Non-Dedicated Support Industries
Apparel, textiles and footwear	General wholesale and retail
Jewellery and coins	General transportation
Other crafts	
Furniture	Telephony and Internet
Household goods, china and glass	
Wall coverings and carpets	
Toys and computer games	
Architecture, engineering, surveying	
Museums	
Interior Design	
Wholesale and retail	

3.2 Comparisons of Industry Classifications between Tanzania and WIPO

Table 2 shows a comparison of the industries recommended by WIPO and those used in the Tanzania survey. The industries generally correspond, as can be seen from the table, even though a few differences exist, including the absence of some industries from the Tanzania classification.

Table 2: Comparison of Tanzania and WIPO Copyright-Based Industries Classification

Category	WIPO Classification	Tanzania Classification	
I. Core	Press and literature	Press and literature	
	Music, theatrical productions and opera	Music, theatrical productions, opera	
	Motion pictures and video	Motion pictures and video	
	Radio and television	Radio and television	
	Photography	Photography	
	Software and databases		
	Visual and graphic arts	Visual and graphic arts	
	Advertising services	Advertising services	
	Copyright collecting societies	Collective Management Society (COSOTA)	
II. Interdependent	TV sets, radios, VCRs, CD players, cassette players, electronic game equipment, and other similar equipment	TV, radios, VCRs, CD and cassette players, electronic game equipment, and other similar equipment	
	Computers and equipment		
	Musical instruments	Musical instruments	
	Photographic and cinematographic equipment	Photographic and cinematographic instruments	
	Photocopiers		
	Blank recording materials	Blank recording materials	
	Paper	Paper	
	Manufacture, wholesale, retail and rental of interdependent industries	Manufacture, wholesale, retail and rental of interdependent industries	
	III. Partial	Apparel, textiles and footwear	Apparel, textiles and footwear
		Jewellery and coins	Jewellery and coins
Other crafts		Other crafts	
Furniture		Furniture	
Household goods, china and glass		Household goods, china and glass	
Wall coverings and carpets		Wall coverings and carpets	
Toys and games		Toys and games	
Architecture, engineering, surveying		Architecture, engineering, surveying	
Interior design		Interior design	
Museums		Museums	
		General wholesale and retail of partial industries	
IV. Non-dedicated		General wholesale and retailing	General wholesale and retail
		General transportation	General transportation
	Telephony and Internet	Telephony and Internet	
		Cargo handling	
		Postage and courier services	
	Storage and warehousing		

Table 3 compares the names and codes used for the Tanzania industry classification with those of the ISIC (Rev. 3.1). As can be seen in this table, the naming and codes used in the industry classification are often different, with each side of the table having its own flow, so only the main titles of the types of copyright industries correspond between the Tanzania industries and the ISIC. The level of aggregation is higher for the Tanzania classification. It can also be noted that a number of industries are missing in the Tanzania classification.

Table 3: Comparison of Copyright-Based Industries Naming and Coding between Tanzania and ISIC Rev. 3.1

Tanzania's Industry Name and Code		ISIC Rev. 3.1 Name and Code	
I. Core Copyright-Based Industries		I. Core Copyright-Based Industries	
Publishing, printing and reproduction of recorded media	22	Publishing of newspapers	2212
		Publishing of books, brochures etc.	2211
Other publishing	2219	Other publishing	2219
Printing	2221	Printing	2221
Services, activities related to printing	2222	Services related to printing	2222
Activities of business & employers organizations	9111		
Activities of professional organizations	9112	Activities of professional organizations	9112
Activities of trade unions	9120		
Activities of other membership organizations	9199		
		Motion picture and video production	9211
		Motion picture projection	9212
Radio and television activities	9213	Radio and TV activities	9213
Dramatic arts, music, and other artistic activities	9214	Dramatic arts and music etc.	9214
Other entertainment activities	9219	Other entertainment activities	9219
News agency activities	9220	News agency activities	9220
Library and archive activities	9231	Library and archive activities	9231
		Other recreational services	9249
		Other retail sale in specialized stores	5239
		Telecommunications	6420
Radio transmission via cable	6423		
Television transmission via cable	6424		
		Wholesale of other household goods	5139
		Wholesale of computers	5151
		Software publishing	7221
		Other software consultancy and supply	7229
		Database activities and online distribution	7240
		Other business activities	7499
		Publishing of music	2213
		Reproduction of recorded media	2230
		Retail sale of household appliances	5233
		Renting of personal goods	7130
		Wholesale of household goods	5139
Advertising	7430	Advertising	7430
		Photographic activities	7494
		Other business activities n.e.c.	7499
		Data processing	7230
II. Interdependent Copyright-Based Industries		II. Interdependent Copyright-Based Industries	
Manufacture of paper and paper products	2101	Manufacture of pulp, paper and paperboard	2101
Manufacture of other particles of paper and paper products	2109		
		Wholesale of other intermediate products	5149
		Other retail sale	5239
		Manufacture of TV and radio receivers	3230
		Manufacture of office machinery	3000
		Wholesale of computers and equipment	5151
		Renting of office machinery	7123
		Wholesale of other machinery	5159

Table 3: Comparison of Copyright-Based Industries Naming and Coding between Tanzania and ISIC Rev. 3.1 (continued)

Tanzania's Industry Name and Code		ISIC Rev. 3.1 Name and Code	
		Manufacture of photographic and optical equipment	3320
		Other retail sale in specialized stores	5239
		Renting of other machinery	7129
		Retail sale of household appliances, articles and equipment	5233
Other Manufacturing	32		
III. Partial Copyright-Based Industries		III. Partial Copyright-Based Industries	
Manufacture of textiles	17		
Preparation and spinning of textile fibers, weaving of textiles	1711		
Finishing of textiles	1712		
Manufacture of made up textiles articles except apparel	1721	Manufacture of made up textiles	1721
Manufacture of cordage, rope, twine and netting	1723	Manufacture of glass and glass products	2610
Manufacture of other textiles	1729	Wholesale	5139
Manufacture of wearing apparel; dressing and dyeing of leather	1810	Manufacture of wearing apparel	1810
Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear	19		
Manufacture of rubber footwear	1920	Manufacture of footwear	1920
Sawmilling and planing of wood	2010		
Manufacture of veneer sheets, plywood, laminate board, board particles and other panels and boards	2021		
Manufacture of wooden containers	2023		
Manufacture of other wood products	2109		
Manufacture of furniture	3610	Manufacture of furniture	3610
Manufacture of jewellery and related articles	3691	Manufacture of jewellery and related articles	3691
		Wholesale of textiles, clothing and footwear	5131
		Wholesale	5139
Retail sale of textiles, clothing, footwear and leather goods	5232	Retail sale of textiles, clothing, footwear	5232
Retail sale of household appliances, articles and equipments	5233	Retail sale of household appliances	5233
Retail sale of hardware, paints and glass	5234		
Other retail sale in specialized stores	5239	Other retail sale	5239
		Renting of personal goods n.e.c.	7130
		Library and archives services	9231
		Museum activities and other preservation	9232
Botanical and zoological gardens and nature reserve activities	9233		
Washing and dry cleaning of textile and fur products	9301		
IV. Non-Dedicated Copyright Industries		IV. Non-Dedicated Copyright Industries	
Wholesale on a fee or a contract basis	5110		
Wholesale of machinery, equipment and supplies	5150	Wholesale of machinery, equipment and supplies	5150
Other wholesale	5190		
Other retail sales in non-specialized stores	5219		

Table 3: Comparison of Copyright-Based Industries Naming and Coding between Tanzania and ISIC Rev. 3.1 (continued)

Tanzania's Industry Name and Code		ISIC Rev. 3.1 Name and Code	
		Retail trade except motor vehicles and motorcycles, repairs of personal and household goods	520
Other retail trade of new goods in specialized stores	523		
		Land transport, transport via pipelines	60
Transport via railways	6010	Transport via railways	601
Other scheduled passenger land transport	6021	Other land transport	602
Freight transport by road	6023		
Inland water transport	6120	Water transport	61
Scheduled air transport	6210	Air transport	62
Non-scheduled air transport	6220		
Cargo handling	6301	Cargo handling	6301
Storage and warehousing	6302	Storage and warehousing	6302
		Supporting and auxiliary transport activities	630
Other supporting transport activities	6303	Other supporting transport activities	6303
Activities of travel agencies and tour operators, tourist assistance activities n.e.c.	6304	Activities of travel agencies and tour operators, tourist assistance activities n.e.c.	6304
Activities of other transport agencies (clearing and forwarding agents)	6309	Activities of other transport agencies	6309
		Post and courier activities	641
National post activities	6411	National post activities	6411
Courier activities other than national post activities	6412	Courier activities other than national post activities	6412
Telecommunications	6420	Telecommunications	6420
Internet cafes	6421		
Telephone and fax centers	6422		
		Database activities and on-line distribution of electronic content	7240

3.3 Data

3.3.1 Data Sources

This study relied on secondary data collected from various institutions, including governmental and non-governmental institutions. Some of the government institutions visited were the Tanzania Revenue Authority (TRA), the National Bureau of Statistics (NBS), the Bank of Tanzania (BOT), and the Tanzania Communication Regulatory Authority (TCRA). Other sources included journal publications and government and other reports. Some of the government reports included annual economic surveys.

The study relied heavily on the WIPO Guide and on similar published reports. The incomplete report from an earlier attempt to carry out a study on copyright-based industries in Tanzania was consulted, even though it had limited value. Internet searches were also employed where necessary to access pertinent information.

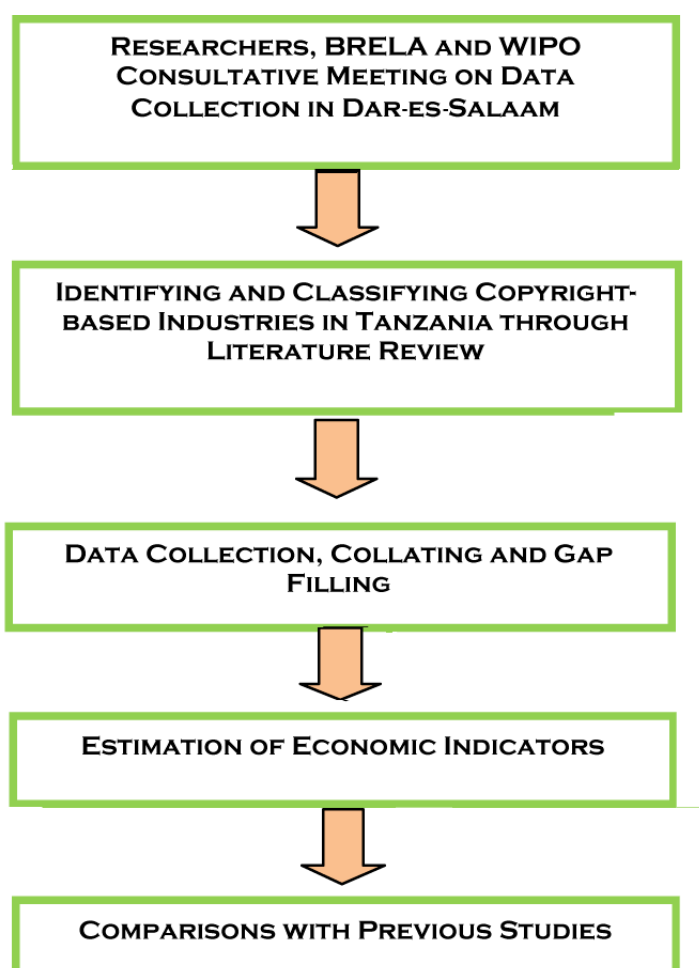
3.3.2 Data Collection Procedures

At the outset a technical meeting was held in Dar-es-Salaam, bringing together consultants from Nairobi and local consultants in Tanzania. The meeting discussed the various reports and documents that the earlier research team had relied on, identifying possible causes of the previous study's failure. One of the main shortcomings of the earlier attempt was the mistake of focusing on primary data rather than secondary data which are published and/or available in government reports and other records. The meeting of consultants in Dar-es-Salaam identified the possible sources of required data and the Tanzania consultants embarked on

conducting a survey with reference to the WIPO Guide. Figure 1 illustrates the sequence of events in data collection, collation and estimation.

This study has relied in good measure on the Kenyan experience. This is relevant and useful, especially because Kenya's and Tanzania's economic structures and levels of development are relatively similar: the two countries have a lot in common because of their proximity and shared borders. Furthermore, at the time of this study, Kenya was the only country in the East African region, and indeed in the African continent, to have successfully completed a study like this; so the Kenya study was very helpful.

Figure 1: Sequence of Events in Data Collection, Collation and Estimation



3.3.3 Data and Survey Challenges

A major difficulty encountered is that the data collection system used by government agencies in Tanzania seems to be fragmented, making it difficult to piece together and collect adequate data. However, efforts were made to circumvent this challenge. Another challenge faced in data collection was the unwillingness of those in authority to divulge information. However, this problem is not unique to Tanzania and can be attributed to the fact that some government officials may not consider such a study to be very important. Some government bureaucrats hold the view that certain data are confidential and therefore should not be released. For example, it was hard to access TRA documents, and TRA staff were relied upon to provide the data.

Additionally, the inadequate availability of data from relevant government sources was due to the absence of a central information collection system, leading to poor record-keeping. According to government officials, most of the data from other regions of Tanzania were not collected or stored in Dar-es-Salaam. This made it difficult to access the regional data.

It was a challenge to obtain data on most wholesalers and retailers, due to the fact that most business people who deal in wholesale and retail pay tax through their Tanzania Identification Number (TIN). In this process, it is not a prerequisite to mention the type of wholesale or retail that is being dealt with – TRA does not prioritize the breakdown of wholesale and retail activities. This made the exercise of identifying data on wholesale and retail problematic.

The list of business activities obtained from TRA only shows names of companies and people paying taxes, without identifying the kind of retail or wholesale. So the relevant companies and individuals in these cases could only be identified if they were already known by the researchers. The researchers had to go through the list to identify these businesses as an attempt to fill in the data gaps.

Neither the Media Council of Tanzania (MCT), nor the TCRA, which acts as a central entity for regulating radio and television, have data on broadcasters' employees or the amount of money they contribute to the government. Thus, to find this information one has to visit about 150 broadcasting organizations. A few of these organizations were identified for primary data collection and the data obtained were extrapolated so as to have a rough estimate of the required data.

The classification coding by the NBS was another challenge. These codes were being changed year after year. Since the data for this study were collected over different years, it was complicated to align the codes with the names of the business activities. Also, NBS and TRA use different codes; these institutions provide different sets of data on similar activities, but they are classified under different codes. This caused serious difficulties and delays in the process of trying to align them.

The absence of adequate and up-to-date data from government offices was a major obstacle. For example, the Ministry of Industry and Trade indicated that it lacked the resources to conduct frequent research, hence the deficiency in the required data. In addition, TRA groups all salaries into a single category: for example, there is a lump-sum amount for the Ministry of Industry and Trade, the Ministry of Communication and Transport, the Permanent Secretary of the Ministry of Industry and Trade, and the National Arts Council, and this sum does not show how much has been collected from how many employees. This made it difficult to achieve a breakdown of the different activities in the copyright industries.

Finally, the lack of data can also be attributed to the fact that most copyright-based businesses operate informally and therefore most of them are not captured within the national statistics system. This is likely to lead to under-reporting of the activities of these businesses, and thus undervaluing of the economic contribution of copyright-based industries.

3.3.4 Dealing with Missing Data

There were several gaps in the data collected from government records. These gaps were filled in by obtaining data from sectoral studies and research reports, which were used to extrapolate, interpolate and project data. Primary data were also collected through the use of questionnaires for the same exercise (see sample questionnaires in Appendix I).

3.4 Data Analysis

3.4.1 Calculation of Indicators of Economic Contribution

The indicators used to establish the contribution of copyright industries to the Tanzanian economy are value added, number of persons employed, employees' incomes, and external trade. This is in line with the WIPO Guide, which has also been adopted in other national studies. The accuracy level of these indicators largely depends on the adequacy of data.

Value added can be obtained in two ways, depending on the approach a study takes. One way of obtaining it is by subtracting intermediate consumption from output. The other way proposes that a value added figure can be obtained when labor costs (including social-security contributions and taxes) are added to the operating margin, and the income from the sale of fixed assets is deducted from this sum. The GDP share of gross value-added (GVA) is calculated to reveal the economic contribution of the copyright-based industries to the domestic economy (WIPO Guide (2003), p. 48).

GDP is, in practice, measured using three approaches: the output or production approach, the expenditure approach, and the income approach. The production approach views GDP as the sum of value added (VA) of all industries, i.e. the difference between output and intermediate consumption. In the expenditure approach, GDP is viewed as the sum of all expenditure categories, including government and household consumption, fixed capital formation, changes in inventories, and exports minus imports. The income approach considers GDP to be the sum of the income due to households (compensation of employees, i.e. wages and salaries, bonuses and other benefits) and corporations (profits or gross operating surpluses) and taxes on production and imports (indirect taxes). All three of these approaches would yield the same estimates of GDP. However, as different sources of data are used, differences between them inevitably arise. Singapore is one of the few countries that compile GDP estimates using all three approaches.³

The output or production approach has been adopted in the Tanzania study. GDP (at basic prices) has been derived by converting the Value Added Tax (VAT) into value-added and then compiling it. VAT for the various copyright-based business activities has been obtained from the TRA. The workforce of the copyright industries has also been calculated and compared with the total workforce. Employee incomes are treated the same way. In order to enable comparison across years, constant prices have been adopted.

3.4.2 Copyright Factors

For selected copyright-based industries, for which only a part of the output is copyright-related, relevant copyright factors need to be derived. A copyright factor is a percentage indicating the proportion of copyright activities in a given industry. This is an expression of the extent of dependence on copyright of the product of the given industry. The copyright factor may be between 0 and 1, depending on the industry. Hence industries that only produce products and works and other protected subject matter, e.g. core and core interdependent copyright-based industries, have a copyright factor of 1, while those having nothing to do with copyright have a factor of 0. However, because of constraints of time and finances, it was not possible to establish the proportion of partial interdependent industries that was copyright-based using the weighting method as stated in the WIPO Guide (2003, paras. 244 and 245). For this reason, both of the interdependent copyright-based industries (i.e. the core interdependent and partial interdependent) have been given a copyright factor of 1, just like the core copyright-based industries.

To derive the copyright factors for the partial copyright-based industries, a survey was carried out in order to establish the amount of money spent on purchases by a sample of households. The respondents were required to state how much the households spent for the whole year and also what they spent on partial copyright industries (see sample questionnaires in Appendix I). A proportion was then calculated, an average of which was used to compute the copyright factors used for partial copyright industries, as indicated in Table 4. Where data were inadequate to calculate a reliable copyright factor, the factor used in the Kenyan study was adopted.

Table 4: Copyright Factors for Partial Copyright Industries in Tanzania

Partial Copyright Industries	Copyright Factor (%)
Apparel	0.69
Footwear	0.67
Textiles	0.49
Jewellery and coins	11.92
Household goods, china and glass	4.68
Furniture, fittings and furnishings	19.74
Wholesale and retail of partial copyright industries	4.68
Architecture, engineering, surveying*	9.15

*Note: Kenya's study factor used due to inadequate data to compute a unique factor for Tanzania (see WIPO Report Series 4, 2011).

³ Statistics Singapore Newsletter (July 2000). "National Accounts: Measuring Gross Domestic Product (GDP)." Singapore Department of Statistics, Singapore.

For the NDSIs, equation (1), proposed by Chow and adopted at the Experts Meeting in Singapore in October 2008, was applied to obtain the copyright factor:

$$NDSI \text{ Copyright Factor} = \left(\frac{\text{Value Added for Core, Interdependent and Partial Industries}}{\text{Non - Distribution GDP}} \right) \quad (1)$$

where the non-distribution GDP is given by GDP minus (value-added of general transportation plus general wholesale and retail plus telephony and Internet) plus value-added of distribution industries in the core, interdependent and partial sub-sectors.

The NDSI factor was worked out for each year from 2007 to 2010 so that each year had its own unique NDSI factor. The factors ranged from 2.98 to 4.47 (Table 5).

Table 5: Copyright Factors for Non-Dedicated Support Industries in Tanzania

Year	2007	2008	2009	2010
NDSI factor (%)	4.20	4.47	4.33	2.98

4. Economic Contribution of Copyright-Based Industries in Tanzania

4.1 General Performance of Copyright-Based Industries

Tanzania's copyright industries contribute considerably to the national economy, as is shown by value added, employment, and employee incomes. The total value added of copyright-based industries in 2007-2010 ranged from TZS 391.635 billion to TZS 680.990 billion, which represented 3.0 and 4.6% of the total GDP of Tanzania, with the year 2009 recording the highest contribution.⁴

In terms of income for employees, the copyright-based industries made a total of TZS 33.175 billion in 2007 and TZS 80.474 billion in 2009. This equates to a proportion of between 2.4% and 5.0% of the total national economic value.

Copyright-based industries employed between 28,202 and 44,331 people over the period 2007 to 2010, which depicts a steady increase. This made up between 4.5% and 5.7% of the total national workforce (government and private sector employees) over this period.

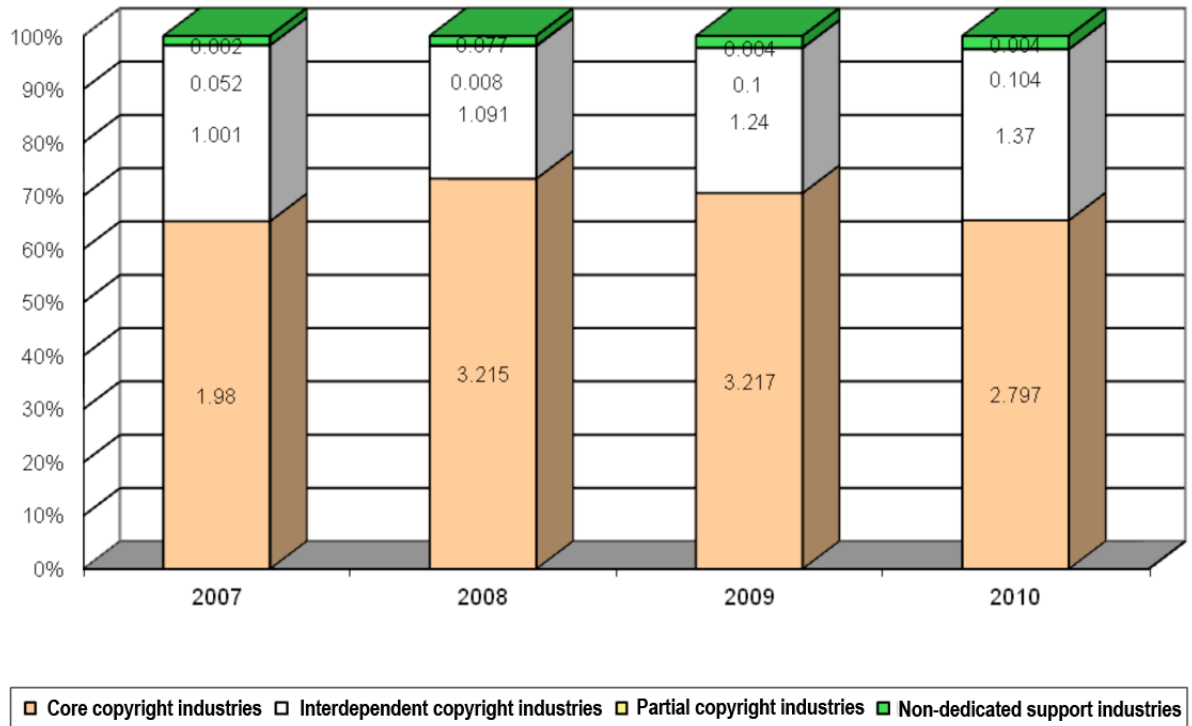
Table 6: Economic Contribution of Copyright Industries in Tanzania, 2007-2010

Year	Value Added		Employee Income		Employee Numbers	
	TZS	% contribution to GDP	TZS	% contribution to national income	Head/number	% contribution to national employment
2007	391,635,535,345	3.043	33,175,394,387	2.373	28,202	4.464
2008	606,196,766,113	4.392	55,779,708,859	3.724	36,915	5.454
2009	676,458,324,498	4.561	80,474,387,573	5.000	40,928	5.633
2010	680,989,952,456	4.275	77,041,444,407	4.457	44,331	5.674

Figure 2 illustrates the contributions made by the various copyright-based industries in Tanzania. In the performance indicators considered in this study – value added, employee income and employment – the core copyright-based industries outperformed the other three categories of copyright-based industries, followed by the interdependent copyright-based industries. With respect to the value added contributed by the various copyright-based industries to the country's total value added, Figure 2 shows that, between 2007 and 2010, the core industries consistently made the highest contribution of the copyright industries (50-70%), followed by the interdependent copyright industries (30-35%).

⁴ All years refer to financial years, e.g., 2007 refers to the 2006-2007 financial year.

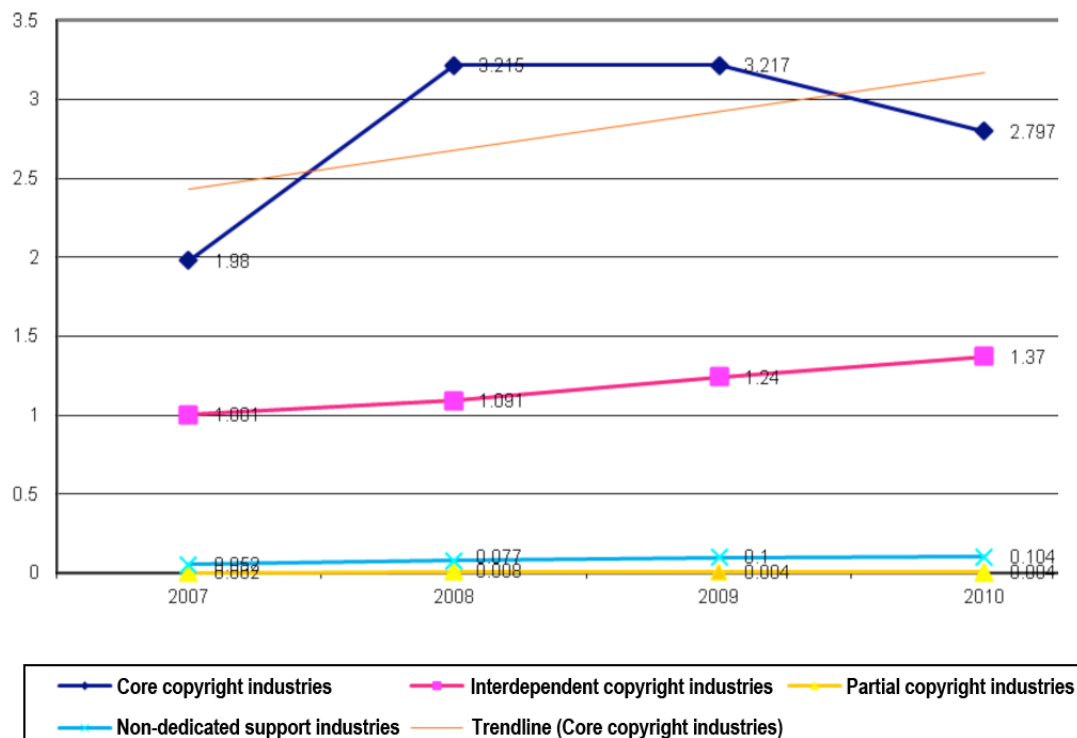
Figure 2: Contribution in Terms of Value Added to the Tanzania National Economy by Copyright-Based Industries, 2007-2010 (%)



Generally speaking, the contribution to the national economy of the various copyright industries in Tanzania has shown a steady rise in the past few years; even though the contribution of the core industries has shown some tapering, the movement (as shown by the trend line) is upwards (Figure 3).



Figure 3: Trends in the Contribution of Copyright-Based Industries to the Tanzania National Economy in Terms of Value Added, 2007-2010 (%)

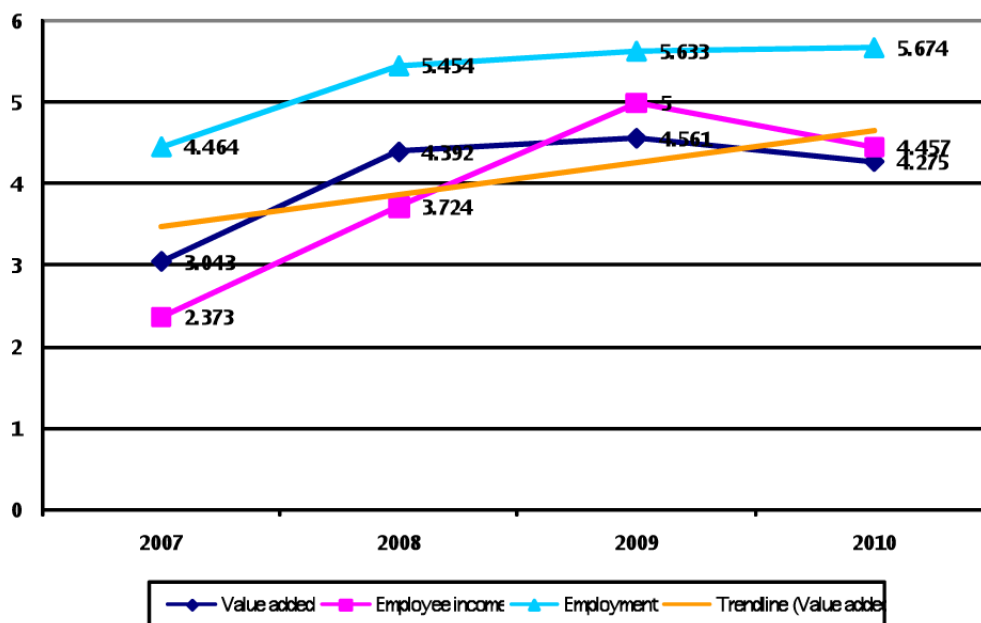


The core and interdependent copyright-based industries, whose activities are assumed to be 100% copyright-dependent, between them contribute more than 90% of value added by the copyright industries, or between 3.0% and 4.5% of the national economy. This demonstrates strongly that, even without including the contributions of partial and non-dedicated copyright-based industries, whose combined contribution is low (less than 0.2%), the level of contribution of copyright-based industries in Tanzania is significant. Of course, this assertion assumes that the copyright factors used for apportionment reasonably represent their share contributions.

Overall, the copyright-based industries in Tanzania have shown considerable growth (Figure 4) in the last few years, even though it is unlikely that all the relevant data can be obtained, so their full contribution may not be known. Needless to say, Tanzania’s copyright industries are probably contributing much more to the national economy, in terms of GDP, income and employment, than is revealed by the available data. However, these results are consistent with those of a similar study for Kenya, where core copyright industries posted higher contributions than the rest of the copyright industries (in all the economic indicators).⁵

⁵ Nyariki, D., Wasonga, O., Otieno, C., Ogadho, E., Ikutwa, C. and Kithinji, J. (2011). The economic contribution of copyright-based industries in Kenya, in WIPO, National studies on assessing the economic contribution of the copyright-based industries. WIPO Publication No. 1024e, WIPO, Geneva.

Figure 4: Trends in the Overall Contribution of Copyright-Based Industries to Value Added, Income and Employment in Tanzania, 2007-2010 (%)



For a more in-depth analysis of the contribution of copyright industries in Tanzania, we present the results of 2009, which provided the latest consistent data. We ignore the 2010 data, because they were derived from government projections. From Table 7, the total contribution by value added for copyright industries was TZS 676.458 billion, translating to approximately 4.6% of the total GDP for that year of TZS 14.828 trillion (at constant prices). The core copyright industries contributed TZS 477.083 billion (3.2%), the interdependent copyright industries TZS 183.9 billion (1.2%), the partial copyright industries TZS 602.577 million (0.004%), and the non-dedicated copyright industries TZS 14.871 billion (0.1%). From this it can be observed that core and interdependent copyright industries contributed the bulk (4.5%) of the total contribution from copyright industries.

Table 7: Economic Contribution of Copyright-Based Industries in Tanzania in 2009 (TZS, Numbers, %)

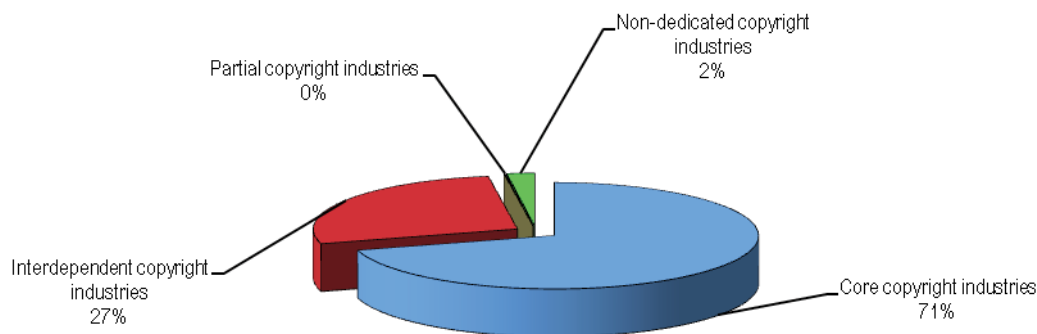
Industries	Gross Domestic Product (GDP)		Employee Incomes		Employee Numbers	
	Million TZS	%	Million TZS	%	People	%
Core copyright industries	477,083,298,840	3.217	28,272,365,169	1.757	18,616	2.560
Interdependent copyright industries	183,900,961,799	1.240	48,294,231,725	3.000	15,589	2.144
Partial copyright industries	602,576,873	0.004	65,035,416	0.004	2,077	0.290
Non-dedicated support industries	14,871,486,986	0.100	3,842,755,263	0.239	4,646	0.639
TOTAL COPYRIGHT INDUSTRIES	676,458,324,498	4.561	80,474,387,573	5.000	40,928	5.633
Total national economy	14,828,345,000,000	100	1,609,000,000,000	100	727,202	100

In terms of employee compensation, the copyright industries combined contributed a total of TZS 80.474 billion, or a proportion of 5.0% of the national economic value of TZS 1.609 trillion. With respect to individual copyright industries, interdependent copyright industries contributed the most, at about TZS 48.294 billion (3%), followed by core copyright industries which contributed about TZS 28.272 billion (1.8%).

With respect to employee numbers, the copyright-based industries combined employed a total of 40,928 people, which was about 5.6% of the total national workforce of 727,202 people. Employee numbers in core copyright industries were 18,616 (2.6%), followed by interdependent copyright industries with 15,589 people (2.1%).

In 2009, as a percentage of the contribution to the national economy from the copyright-based industries, the core industries made the largest contribution (71%) in terms of GDP, followed by the interdependent industries (27%). The partial and non-dedicated copyright-based industries made a contribution of just 2% (Figure 5).

Figure 5: Share Contributions within Copyright-Based Industries in Tanzania in Terms of Value Added (GDP) in 2009



The core copyright-based industries again contributed the highest share (46%) of the total copyright-based employment, compared with the contribution of interdependent industries (38%) (Figure 6). The partial and non-dedicated copyright-based industries in this respect also contributed 11% and 5% respectively.

Figure 6: Share Contributions within Copyright-Based Industries in Tanzania in Terms of Employment in 2009

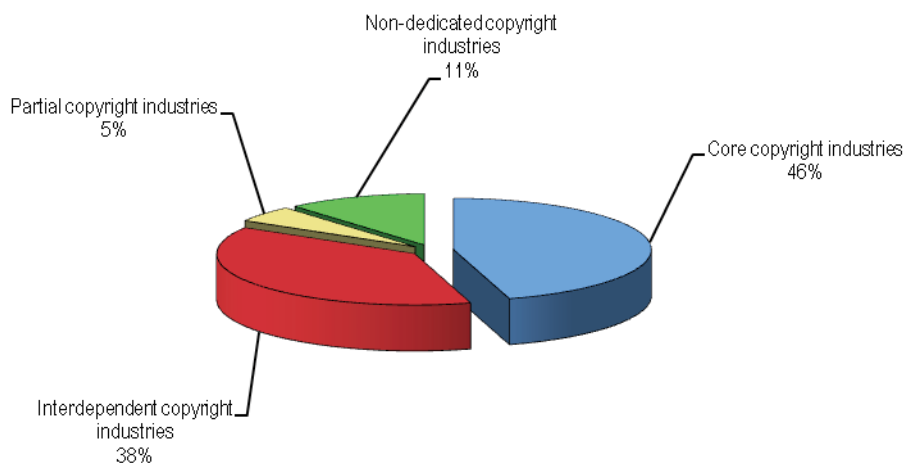
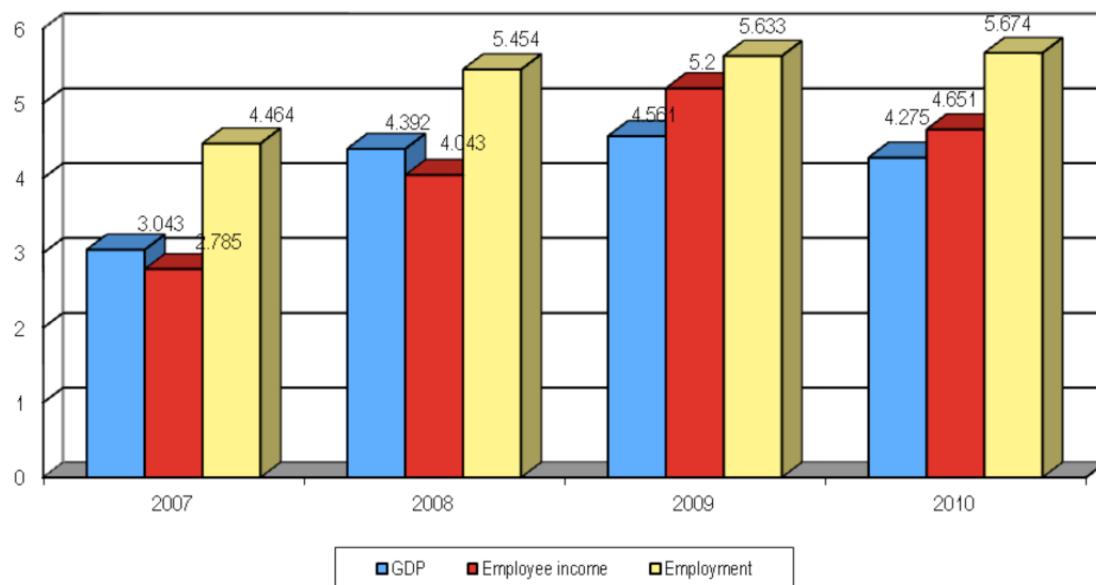


Figure 7 further illustrates the overall economic contribution of copyright industries to the Tanzanian economy between 2007 and 2010. As can be observed, the year 2009 recorded the highest contribution in terms of GDP and employment, followed by 2008, while the year 2007 recorded the lowest in both. The year 2009 again recorded the highest in terms of employee income, followed by the year 2010, while 2007 recorded the lowest levels in this indicator.

Figure 7: Economic Contribution of Copyright-Based Industries in Tanzania, 2007-2010 (%)



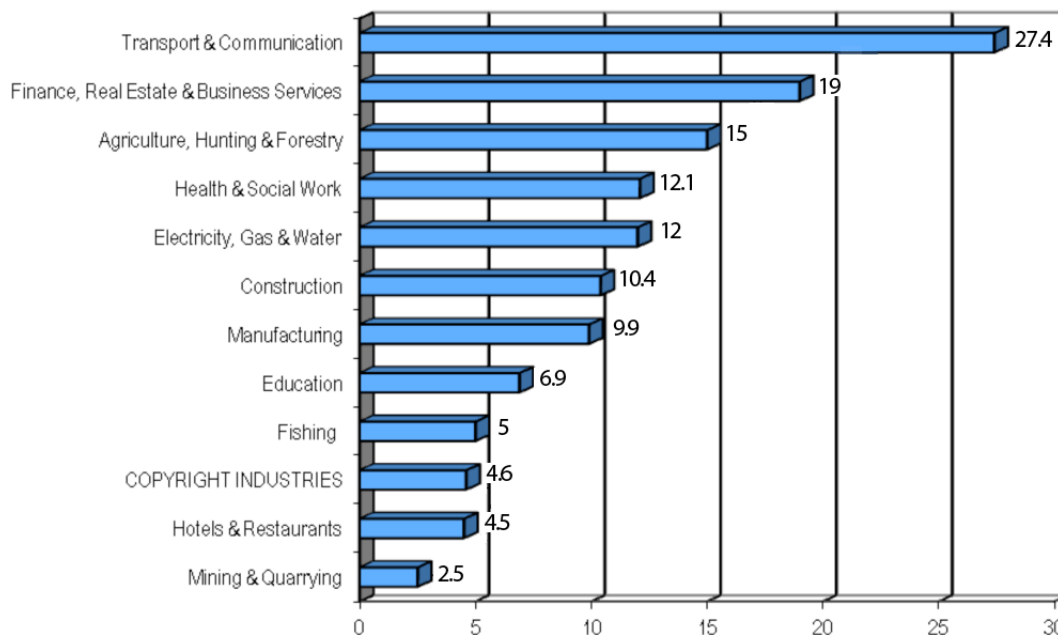
4.2 Economic Contribution of Copyright-Based Industries Compared with Other Sectors

The contribution of copyright-based industries in terms of GDP compared with other selected sectors in Tanzania is shown in Table 8. Figure 8 graphically illustrates the performances of the various economic and social sectors in the year 2009. The table shows that the country depended heavily on transport and communication (24.5-30.4%); finance, real estate and business services (17.7-19.4%); and agriculture, hunting and forestry (13.9-15.2%) over the period 2007-2010. In 2007, the hotels and restaurants sector performed better than the copyright industries. However, these two sectors performed equally in 2008. In 2009 copyright industries performed better than the mining and quarrying and hotels and restaurants sectors, and in 2010 they exceeded the performance of the mining and quarrying sector, and equalled the performance of the hotels and restaurants sector. In fact, the core copyright industries alone contributed more than the mining and quarrying sector in 2009 and 2010 (3.2% and 2.8% respectively). This underscores the importance of the copyright-based industries to the economy of Tanzania (see Table 8 and Figure 8).

Table 8: Share of GDP (%) by Economic Activity (including Copyright) in Tanzania, 2007-2010

Sector	2007	2008	2009	2010
Mining and Quarrying	15.6	10.7	2.5	2.6
Hotels and Restaurants	4.3	4.4	4.5	4.3
COPYRIGHT INDUSTRIES	3.0	4.4	4.6	4.3
Fishing	5.0	4.5	5.0	5.8
Education	5.0	5.5	6.9	6.6
Manufacturing	8.5	8.7	9.9	9.7
Construction	9.3	9.5	10.4	9.7
Electricity, Gas and Water	5.3	18.5	12.0	11.3
Health and Social Work	12.2	12.0	12.1	12.1
Agriculture, Hunting and Forestry	13.9	15.1	15.0	15.2
Finance, Real Estate and Business Services	19.4	17.7	19.0	18.9
Transport and Communication	24.5	26.6	27.4	30.4

Figure 8: Contribution of Copyright-Based Industries to Tanzania's Economy Compared with Other Sectors on the Basis of Value Added in 2009 (%)



On the basis of employment, the copyright-based industries in 2009 collectively employed 727,202 persons, or 5.6% of the national workforce (including government and private sectors) (Figure 9). Employee numbers for copyright-based industries were higher than those in health and social work; finance, real estate and business services; construction; transport and communication; mining and quarrying; and the electricity, gas and water sectors. The employment figures were also higher than those of the construction; transport and communication; mining and quarrying; and electricity, gas and water sectors combined.

Figure 9: The Contribution of Copyright-Based Industries to Tanzania's Economy Compared with Other Sectors Based on Employment in 2009 (%)

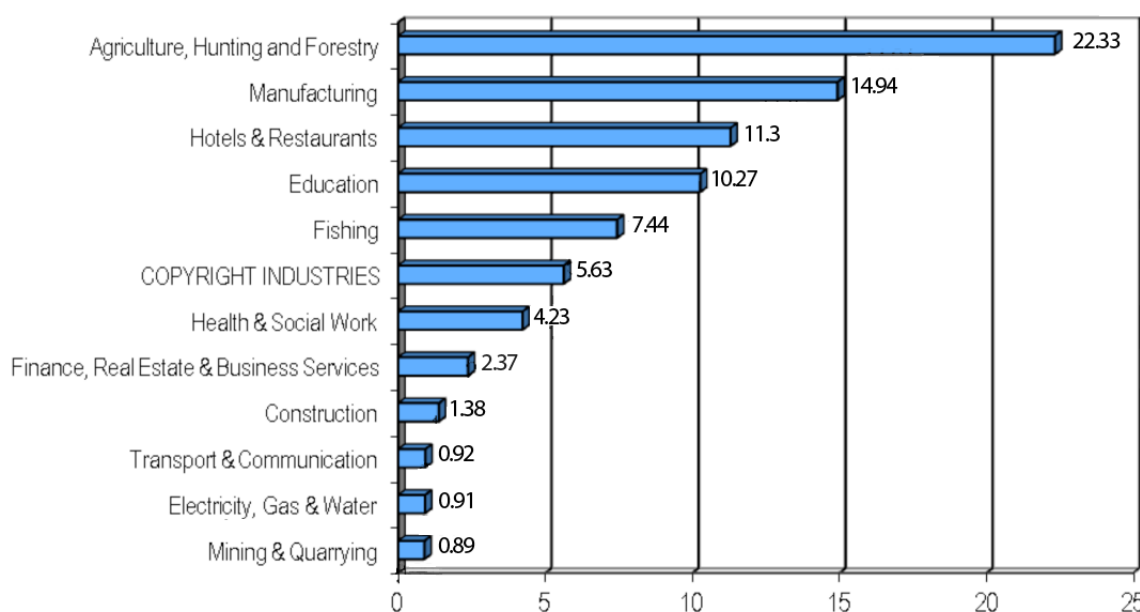
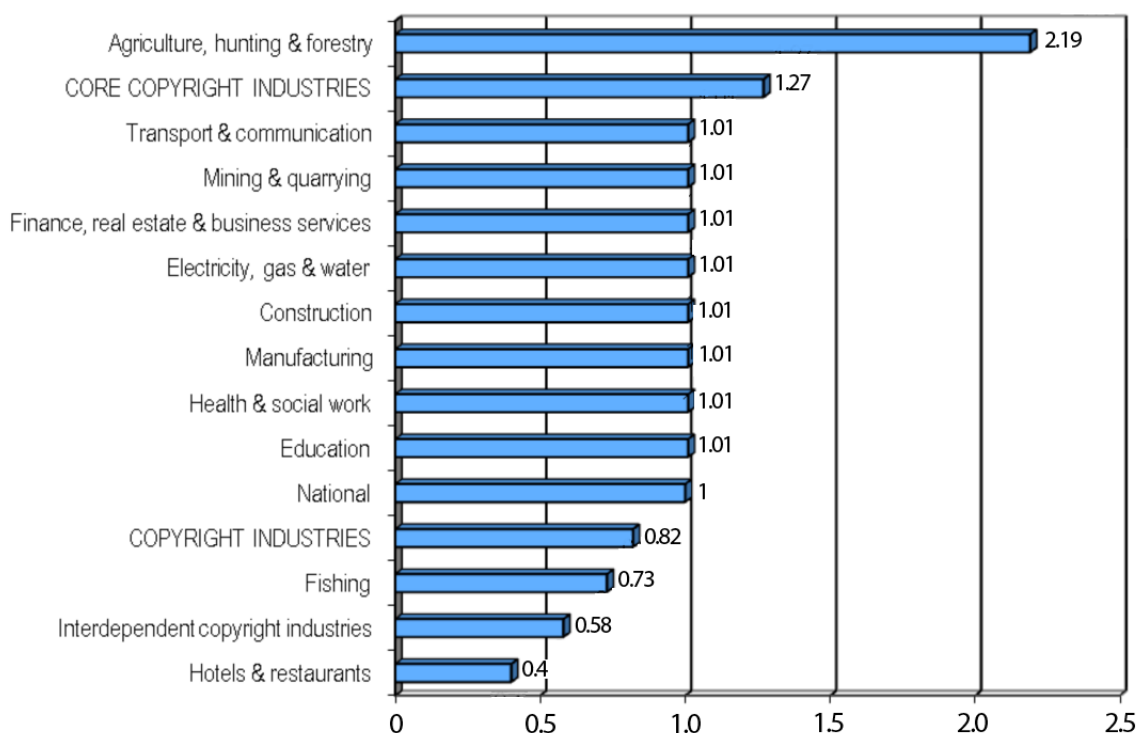


Figure 10 illustrates the productivities of the core, interdependent and total copyright-based industries alongside other sectors that contributed to Tanzania’s national economy in 2009.⁶ The core copyright-based industries exhibited impressive productivity, second only to the agricultural, hunting and forestry sector. The productivity index of the core copyright-based industries, calculated as a fraction of added value in million TZS shillings per employee compared with the national productivity as a reference, is suspected to be an overestimate, because employee numbers in the creative industries in general are difficult to capture and are normally under-reported, which would lead to high productivity values. However, the overall copyright-based industries only outperformed two main sectors – fishing, and hotels and restaurants – in terms of labor productivity.

Figure 10: Productivity of Copyright-Based Industries in Tanzania (Total Added Value/Employee) Compared with Other Sectors in 2009 (with National Productivity as the Reference)



4.3 Economic Contribution of Core Copyright-Based Industries

As shown in Table 9, core copyright-based industries collectively contributed between TZS 255.099 billion and TZS 477.083 billion of value added in 2007-2010. This translates to about 2.0-3.2% of the total national added value over the same period (see also the illustration in Figure 10).

Regarding contribution to employee income, the core copyright-based industries generated between TZS 14.969 billion and 28.272 billion, or about 1.1-1.8% of the total national incomes generated for employees between 2007 and 2010. With respect to employment, the core copyright-based industries collectively employed between 12,247 and 20,079 persons, or about 1.9-3.0% of total national employees (Table 9, Figure 11).

⁶ It is noted that considerable extrapolation of data is done between ministries/sectors, and this is the reason many sectors exhibit the same labor productivity values.

Table 9: Economic Contribution of Core Copyright-Based Industries in Tanzania, 2007-2010

Year	Value Added		Employee Income		Employee Numbers	
	TZS	% contribution to GDP	TZS	% contribution to national income	Head/Number	% contribution to national employment
2007	255,098,812,610	1.980	14,968,966,326	1.071	12,247	1.939
2008	443,756,050,480	3.215	27,387,048,990	1.829	19,991	2.953
2009	477,083,298,840	3.217	28,272,365,169	1.757	18,616	2.560
2010	445,504,374,830	2.797	20,742,872,602	1.200	20,079	2.570

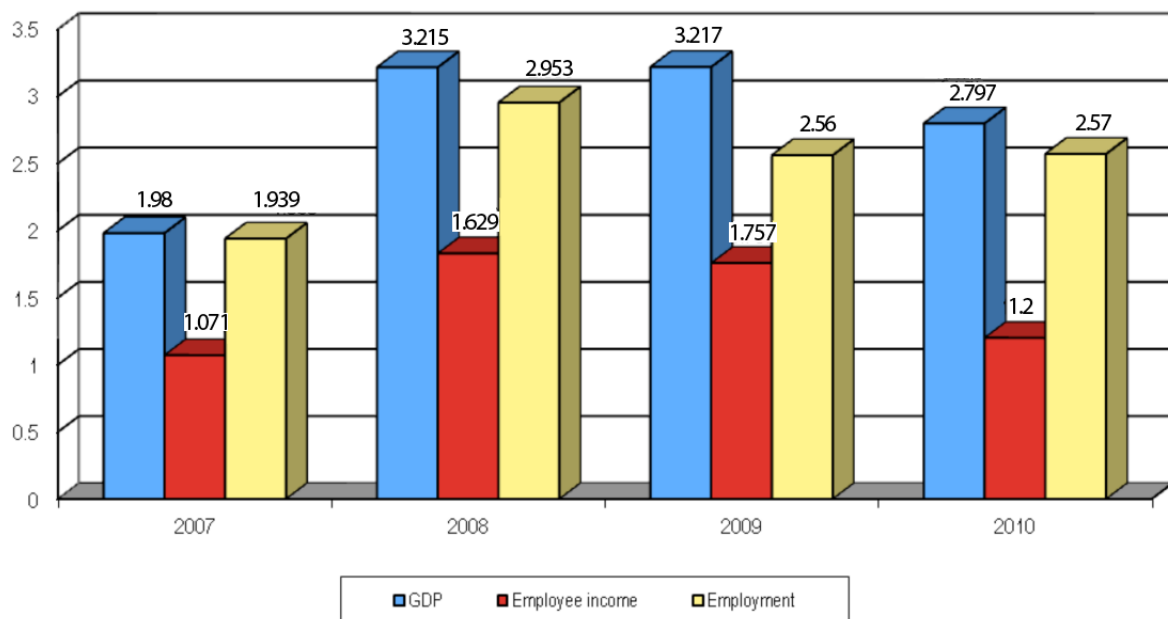
As indicated in Figure 11, the three indicators – GDP, employee compensation and employment – depicted the same pattern in terms of contribution to the national economy over the period of study. In all four years in the study, the core copyright industries made the highest proportional contribution to GDP, followed by employment. The year 2009 recorded the highest contribution in terms of GDP, followed by 2008, while 2008 was the best year for core copyright industry employment. The year 2007 was the worst performer in all the indicators.

The core copyright-based industries consistently made a lower contribution to employment and employee incomes than to value added. This contrasts with the results of some similar studies, such as that for Hungary in 2002, which showed that the core copyright industries made a higher contribution to both employment numbers and incomes for employees than to value added.⁷ The pattern of results for Tanzania is closely associated with that for Kenya, which showed the contribution to employee numbers to be higher than the contribution to employee incomes, but lower than value added.⁸ In this respect, the Tanzanian scenario compares well with that of Kenya and those of the more industrialized countries such as the United States of America. It is argued that the Hungarian situation is a reflection of the fact that the core copyright-based industries use a larger labor force than the average industry. It is further argued that this apparent loss in productivity may be due to the lower level of mechanization and automation in the core copyright-based industries compared with the level in industrialized countries, and the slow establishment of new, labor-saving technologies because of a lack of finance. If the Tanzanian outcome is not attributable to data problems, the differences observed may be due to the lower volumes involved in the Tanzanian case, and may also be an indication that the copyright-based industries are not very well established. Furthermore, the number of people employed in the copyright-based industries is likely larger than that reported in government statistics.

⁷ Penyigey, K. and Munkácsi, P. (2005). "The Economic Contribution of Copyright-Based Industries in Hungary." In: National Studies on Assessing the Economic Contribution, WIPO.

⁸ Nyariki, D., Wasonga, O., Otieno, C., Ogadho, E., Ikutwa, C. and Kithinji, J. (2011). The economic contribution of copyright-based industries in Kenya, in WIPO, National studies on assessing the economic contribution of the copyright-based industries. WIPO Publication No. 1024e, WIPO, Geneva.

Figure 11: Economic Contribution of Core Copyright-Based Industries in Tanzania, 2007-2010 (%)



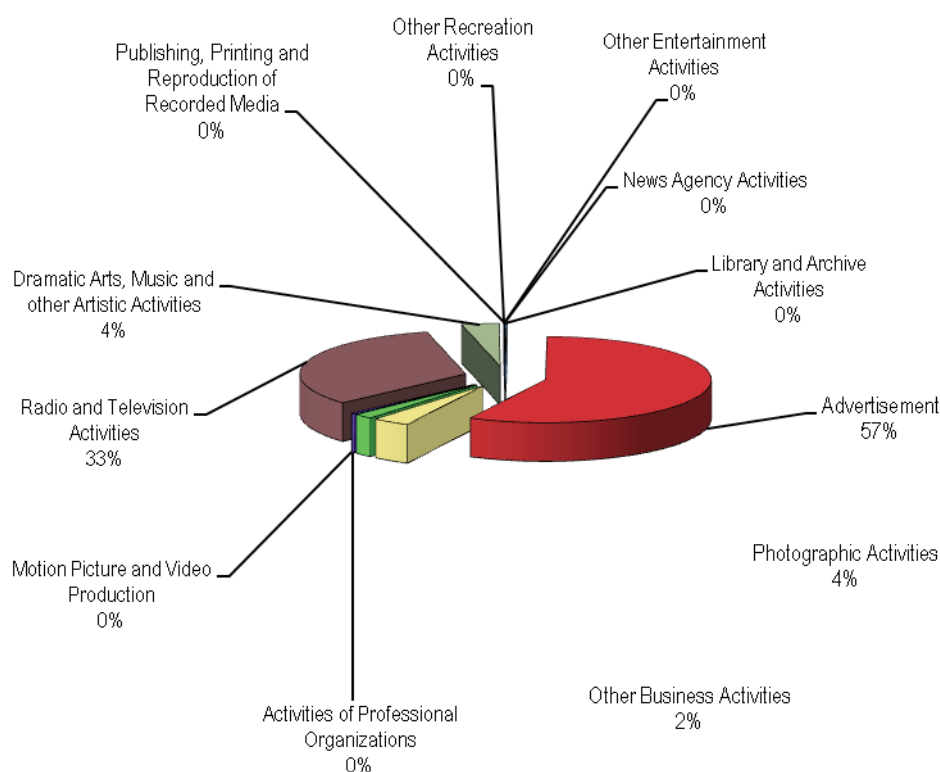
Focusing on 2009 (Table 10, Figure 12), advertising contributed a total of TZS 273.464 billion of value added, and was the highest contributor to value added of all the core copyright industries in Tanzania in that year. This amounts to approximately 57% of the total value added of TZS 477.083 billion. Radio and television was second, contributing a total of TZS 157.4193 billion, or about 33%. The smallest contributor in terms of value added in 2009 was motion picture and video production with TZS 10.965 million (0.002%).

Table 10: Value Added by Sub-Sectors of Core Copyright-Based Industries in Tanzania, 2007-2010

Activity	2007	2008	2009	2010
Publishing, Printing and Reproduction of Recorded Media	139,785,810	273,987,960	718,034,190	746,375,900
Advertising	107,055,889,720	182,626,295,350	273,463,744,120	126,756,389,580
Photographic Activities	2,503,624,420	5,717,871,320	17,238,140,700	4,573,344,560
Other Business Activities	42,370,061,550	90,939,498,020	8,570,627,760	79,948,311,390
Activities of Professional Organizations	354,444,580	694,716,930	1,820,537,040	1,892,448,250
Motion Picture and Video Production	2,134,860	4,184,360	10,965,310	11,398,440
Radio and Television Activities	99,199,180,250	156,691,006,890	157,419,295,720	213,029,395,520
Dramatic Arts, Music and other Artistic Activities	3,376,939,630	6,618,854,630	17,345,006,900	18,030,134,670
Other Entertainment Activities	5,518,560	10,816,460	28,345,020	29,464,650
News Agency Activities	12,030,250	23,579,480	61,791,090	64,231,840
Library and Archive Activities	16,827,720	32,982,590	86,432,360	89,846,440
Other Recreation Activities	62,375,260	122,256,490	320,378,630	333,033,590
Total Value Added	255,098,812,610	443,756,050,480	477,083,298,840	445,504,374,830

Source: Statistical Abstract (2009).

Figure 12: Contribution of Sub-Sectors of Core Copyright-Based Industries to Value Added in Tanzania in 2009 (%)



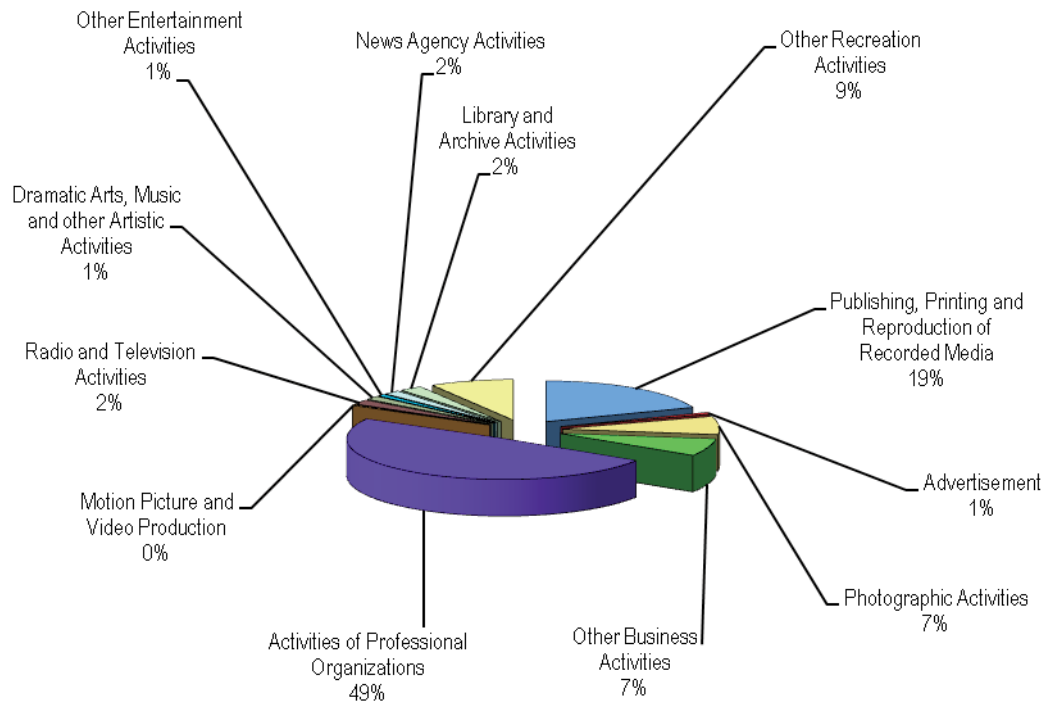
Regarding employment, activities of professional organizations were the highest contributor to the core copyright industries, employing a total of 9,120 people out of a total of 18,616 in 2009. This is approximately 49% of the total number of employees in the core copyright industries. The next highest employee numbers were in publishing, printing and reproduction of recorded media, in which there were 3,597 employees (19%). Motion picture and video production contributed the least, employing a total of 55 people, translating to 0.30% (Table 11, Figure 13).

Table 11: Employee Numbers in Sub-Sectors of Core Copyright-Based Industries in Tanzania, 2007-2010

Activity	2007	2008	2009	2010
Publishing, Printing and Reproduction of Recorded Media	2,355	3,843	3,597	3,880
Advertising	86	141	132	142
Photographic Activities	870	1,420	1,329	1,434
Other Business Activities	836	1,368	1,280	1,380
Activities of Professional Organizations	5,971	9,744	9,120	9,838
Motion Picture and Video Production	36	59	55	59
Radio and Television Activities	226	369	345	372
Dramatic Arts, Music and other Artistic Activities	237	386	268	289
Other Entertainment Activities	93	152	142	153
News Agency Activities	202	331	310	334
Library and Archive Activities	284	463	433	467
Other Recreation Activities	1,051	1,715	1,605	1,731
Total Employee Numbers	12,247	19,991	18,616	20,079

Source: Business Survey (2008); Statistical Abstract (2009).

Figure 13: Contribution of Sub-Sectors of Core Copyright-Based Industries to Employment in Tanzania in 2009 (%)



In terms of employee income in 2009, advertising topped the other core copyright industries, earning employees TZS 27.346 billion out of a total of TZS 28.272 billion. This is 97% of the total wages and salaries in the core copyright industries in 2009. Advertising was followed by “other business activities” which contributed TZS 857.063 million, providing a share of 3% (Table 12).

Table 12: Employee Income from Sub-Sectors of Core Copyright-Based Industries in Tanzania, 2007-2010

Activity	2007	2008	2009	2010
Publishing, Printing and Reproduction of Recorded Media	5,514,431	6,373,354	14,413,507	15,140,508
Advertising	10,705,588,972	18,262,619,535	27,346,374,412	12,675,638,958
Photographic Activities	2,037,461	2,354,902	5,325,423	5,593,824
Other Business Activities	4,237,006,155	9,093,949,802	857,062,776	7,994,831,139
Activities of Professional Organizations	13,981,674	16,160,049	36,544,661	38,386,512
Motion Picture and Video Production	84,319	97,456	220,390	231,490
Radio and Television Activities	528,912	611,318	1,382,446	1,452,121
Dramatic Arts, Music and other Artistic Activities	410,865	474,879	1,073,900	1,128,025
Other Entertainment Activities	217,697	251,615	569,007	597,685
News Agency Activities	475,254	549,300	1,242,198	1,304,805
Library and Archive Activities	659,996	762,825	1,725,070	1,812,014
Other Recreation Activities	2,460,590	2,843,955	6,431,379	6,755,521
Total Employee Income	14,968,966,326	27,387,048,990	28,272,365,169	20,742,872,602

Source: Statistical Abstract (2009).

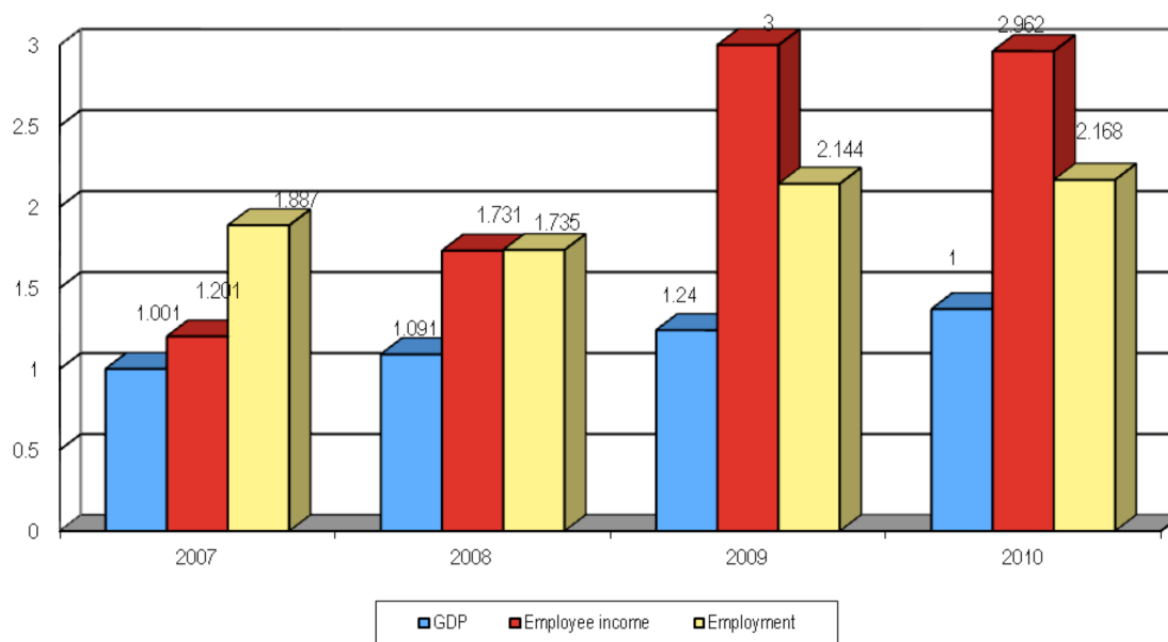
4.4 Economic Contribution of Interdependent Copyright-Based Industries

Interdependent copyright industries as a group contributed TZS 129.647 billion and TZS 218.259 billion of value added over the 2007-2010 period. This translated to about 1-1.37% of the total national value added over the same period. With respect to the contribution to employee income, the interdependent copyright industries generated TZS 16.793 billion and 59.195 billion, or about 1.2-3.0% of the total national incomes generated for employees between 2007 and 2010. With respect to employment, the interdependent copyright industries together employed 11,920 and 16,931 persons, or about 1.9-2.2% of all employees nationally (Table 13, Figure 14).

Table 13: Economic Contribution of Interdependent Copyright-Based Industries in Tanzania, 2007-2010

Year	Value Added		Employee Income		Employee Numbers	
	TZS	% contribution to GDP	TZS	% contribution to national income	Head/Number	% contribution to national employment
2007	129,647,192,889	1.001	16,792,895,234	1.201	11,920	1.887
2008	150,640,635,713	1.091	25,917,414,455	1.731	11,746	1.735
2009	183,900,961,799	1.240	48,294,231,725	3.000	15,589	2.144
2010	218,258,758,647	1.370	51,194,690,617	2.962	16,931	2.168

Figure 14: Economic Contribution of Interdependent Copyright-Based Industries in Tanzania, 2007-2010 (%)



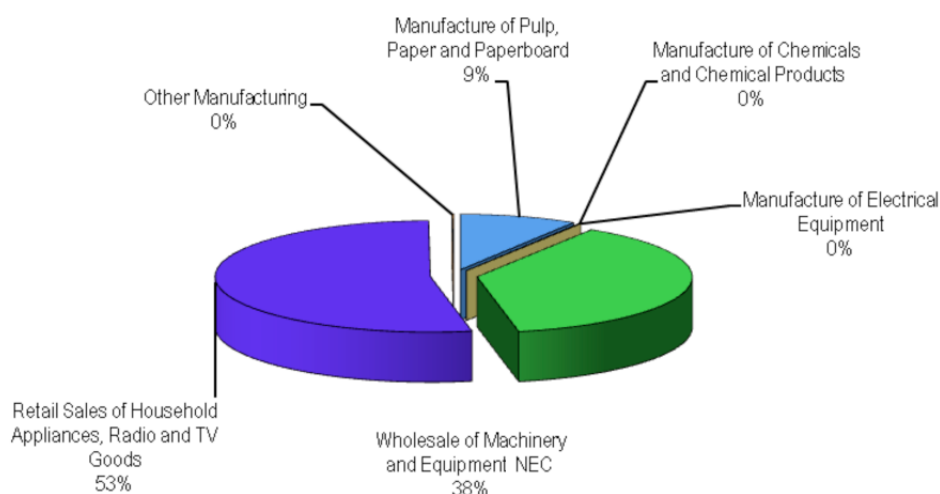
Considering the breakdown of the interdependent copyright industries and focusing on the year 2009, “retail sales of household appliances, radio and TV goods” remained the highest contributor to value added, providing TZS 97.417 billion or 53% of the total value added, followed by the wholesale of machinery and equipment n.e.c., which contributed about TZS 69.843 billion or 38% of the total value added by interdependent industries that year. The manufacture of electrical equipment contributed the least during this year, recording only 0.005% (Table 14, Figure 15).

Table 14: Value Added by Sub-Sectors of Interdependent Copyright-Based Industries in Tanzania, 2007-2010

Activity	2007	2008	2009	2010
Manufacture of Pulp, Paper and Paperboard	7,436,736,069	18,068,938,081	16,241,561,262	20,426,181,452
Manufacture of Chemicals and Chemical Products	54,632,429	138,843,185	159,347,579	167,314,958
Manufacture of Electrical Equipment	13,617,804	16,138,692	10,781,638	11,320,720
Wholesale of Machinery and Equipment n.e.c.	56,789,299,219	61,849,204,269	69,843,414,806	80,430,183,665
Retail Sales of Household Appliances, Radio and TV Goods	65,350,706,166	70,561,917,337	97,417,317,210	116,983,791,583
Other Manufacturing	2,201,202	5,594,149	228,539,304	239,966,269
Total Added Value	129,647,192,889	150,640,635,713	183,900,961,799	218,258,758,647

Source: Statistical Abstract (2009).

Figure 15: Contribution of Sub-Sectors of Interdependent Copyright-Based Industries to Value Added in Tanzania in 2009 (%)



As shown in Table 15, employee income for the interdependent copyright industries from “other manufacturing” in 2009 was the highest contributor, with TZS 30.995 billion (or 64% of the total employee income), followed by the manufacture of chemical and chemical products, which contributed about TZS 11.283 billion (or 23%). In that particular year, the wholesale of machinery and equipment was the lowest contributor, recording only TZS 764.622 million (or about 2%).

Table 15: Employee Incomes from Interdependent Copyright-Based Industries in Tanzania, 2007-2010

Activities	2007	2008	2009	2010
Manufacture of Pulp, Paper and Paperboard	6,958,913,000	8,065,789,000	3,381,754,000	3,550,842,000
Manufacture of Chemicals and Chemical Products	4,667,698,000	9,371,197,000	11,282,851,000	11,846,994,000
Manufacture of Electrical Equipment	1,922,184,000	2,994,241,000	803,621,000	1,148,602,000
Wholesale of Machinery and Equipment n.e.c.	521,568,000	572,310,000	764,622,000	802,853,000
Retail Sales of Household Appliances, Radio and TV Goods	600,198,234	652,931,455	1,066,491,725	1,167,730,617
Other Manufacturing	2,122,334,000	4,260,946,000	30,994,892,000	32,677,669,000
Total Employee Incomes	16,792,895,234	25,917,414,455	48,294,231,725	51,194,690,617

Source: Statistical Abstract (2009).

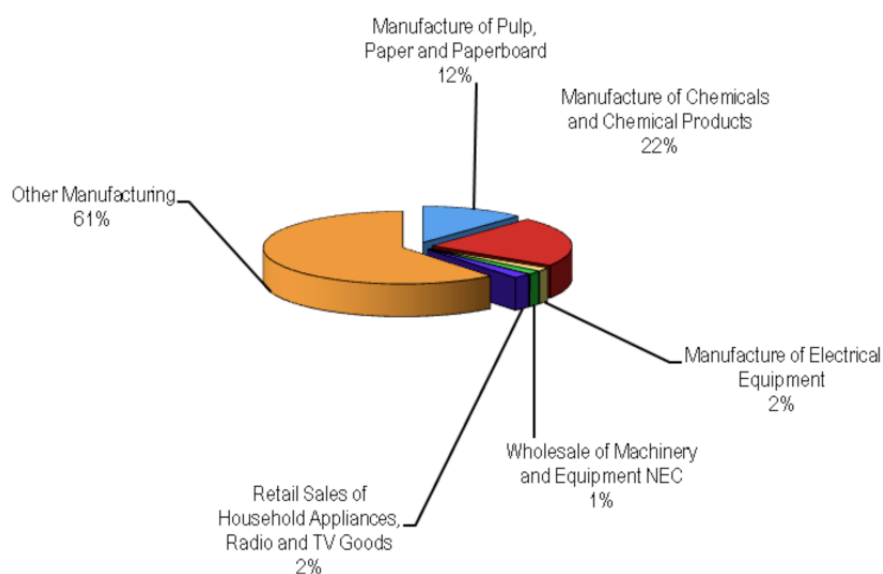
With respect to employment, “other manufacturing” was the highest employer in the interdependent copyright industries in 2009, contributing 9,475 people out of the total 15,589 employed that year, or 60%. The manufacture of chemicals and chemical products was second, with 3,449 employees, or about 22%, while the lowest contributor in that year was the wholesale of machinery and equipment n.e.c., recording only 234 employees (2%) (Table 16, Figure 16).

Table 16: Employee Numbers in Interdependent Copyright-Based Industries in Tanzania, 2007-2010

Activities	2007	2008	2009	2010
Manufacture of Pulp, Paper and Paperboard	4,281	4,133	1,859	1,955
Manufacture of Chemicals and Chemical Products	3,626	3,997	3,449	3,724
Manufacture of Electrical Equipment	1,493	1,277	246	361
Wholesale of Machinery and Equipment n.e.c.	405	244	234	252
Retail Sales of Household Appliances, Radio and TV Goods	466	278	326	367
Other Manufacturing	1,649	1,817	9,475	10,272
Total Employee Numbers	11,920	11,746	15,589	16,931

Source: Statistical Abstract (2009).

Figure 16: Contribution of Sub-Sectors of Interdependent Copyright-Based Industries to Employment in Tanzania in 2009 (%)



4.5 Economic Contribution of Partial Copyright-Based Industries

In the period from 2007-2010, the joint contribution of partial copyright industries ranged from TZS 253.061 million to TZS 1.129 billion of value added, or about 0.002-0.008% of the total national value added over the same period. The year 2008 registered the highest value added in partial copyright industries, while 2007 registered the lowest value.

Regarding the contribution to employee income, the partial copyright industries generated TZS 3.275 billion to TZS 5.775 billion, or about 0.2-0.4% of the total national incomes generated for employees between 2007 and 2010. The industries as a group employed between 1,339 and 2,077 persons, or about 0.2-0.3% of total national employees (Table 17, Figure 17).

Table 17: Economic Contribution of Partial Copyright-Based Industries in Tanzania, 2007-2010

Year	Value Added		Employee Income		Employee Numbers	
	TZS	% contribution to GDP	TZS	% contribution to national income	Head/Number	% contribution to national employment
2007	253,061,249	0.002	5,775,241,007	0.413	2,077	0.329
2008	1,128,952,495	0.008	4,861,169,981	0.325	2,081	0.307
2009	602,576,873	0.004	3,275,595,957	0.204	2,077	0.290
2010	580,788,572	0.004	3,429,912,237	0.198	1,339	0.171

Figure 17: Economic Contribution of Partial Copyright-Based Industries in Tanzania, 2007-2010 (%)

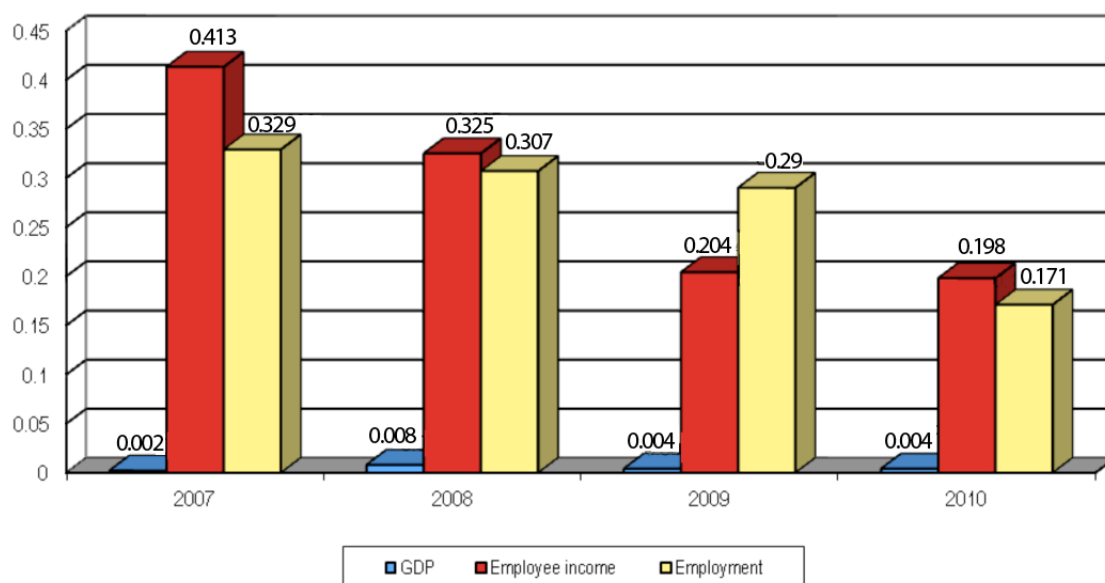


Table 18 shows that, when partial copyright industries are categorized, engineering, architectural and technical services contributed the largest value added between 2007 and 2010. Value added for these services rose between 2007 and 2008 before dropping between 2009 and 2010.

In the year 2009, engineering, architectural and technical services contributed about 96% of the total value added attributed to partial copyright industries. The next largest category was the manufacture of jewellery and related articles, which recorded about 2%. The lowest contributor during that year was washing and dry cleaning of textiles and fur products.

Table 18: Value Added by Partial Copyright-Based Industries in Tanzania, 2007-2010

Activities*	2007	2008	2009	2010
Manufacture of Textiles (0.49)	721,141	829,006	394,322	414,039
Manufacture of Wearing Apparel, Dressing and Drying of Leather (0.67)	3,901	7,797	41,435	3,563
Manufacture of Luggage, Handbags, Saddlers and Footwear (0.67)	127,606	126,466	40,234	42,246
Manufacture of Leather and Related Products (0.67)	31,954	15,973	10,841	10,171
Manufacture of Rubber and Plastic Products (0.67)	187,986	295,311	876,804	920,644
Manufacture of Glass Products (0.39)	438,186	688,356	2,043,787	2,145,977
Retail Sale of Glass and Hardware (0.39)	2,581	3,830	2,446	22,456
Manufacture of Wood and Cork Products Except Furniture (41.00)	5,415,002	5,546,813	2,420,011	254,101
Manufacture of Furniture (19.74)	4,504,466	7,136,375	1,684,466	1,768,690
Manufacture of Jewellery and Related Articles (5.91)	8,608,573	14,837,410	14,378,617	60,127,437
Wholesale of Textile, Clothing and Footwear (0.67)	53,212	61,247	29,151	30,622
Retail Sale of Textiles, Clothing, Footwear and Leather Goods (0.67)	1,733,387	1,992,659	947,822	995,213

Table 18: Value Added by Partial Copyright-based Industries in Tanzania, 2007-2010 (continued)

Activities*	2007	2008	2009	2010
Retail Sale of Household Appliances, Articles and Equipment (0.67)	18,642	21,484	332,446	349,067
Retail Sale of Hardware, Paints and Glass (0.39)	18,676	21,523	333,063	349,728
Other Retail Sale in Specialized Stores (0.67)	37,669	43,411	671,771	705,368
Washing and Dry Cleaning of Textiles and Fur Products (0.49)	44,495	51,274	24,381	25,605
Engineering, Architectural and Technical Services (9.15)	231,113,772	1,097,273,560	578,345,276	512,623,645
Total Value Added	253,061,249	1,128,952,495	602,576,873	580,788,572

*Figures in brackets are copyright factors applied.
Source: Statistical Abstract (2009).

“Engineering, architectural and technical services” recorded the highest employee income in the partial copyright industries throughout the years 2007 to 2010 (Table 19). In 2009, it contributed about TZS 62.515 million (or 96% of the total wages and salaries for partial copyright industries). This was followed by the manufacture of jewellery and related articles, which contributed TZS 1.592 million (or about 2.4% of the total wages and salaries for partial copyright industries). The lowest contribution was made by the manufacture of wearing apparel, and the dressing and drying of leather.

Table 19: Employee Income from Partial Copyright-Based Industries in Tanzania, 2007-2010

Activity	2007	2008	2009	2010
Manufacture of Textiles (0.49)	56,509	75,775	49,909	52,404
Manufacture of Wearing Apparel, Dressing and Drying of Leather (0.69)	951	788	531	557
Manufacture of Luggage, Handbags, Saddlers and Footwear (0.67)	2,853	3,152	5,310	5,570
Manufacture of Leather and Related Products (0.67)	10,943	10,804	10,118	10,623
Manufacture of Rubber and Plastic Products (0.67)	64,377	85,540	37,550	44,123
Manufacture of Glass Products (0.39)	140,410	186,568	81,900	96,234
Retail Sale of Glass and Hardware (0.39)	827	1,038	98	1,007
Manufacture of Wood and Cork Products Except Furniture (41.00)	771,488	987,932	31,165	327,185
Manufacture of Furniture (19.74)	810,805	627,724	458,948	485,278
Manufacture of Jewellery and Related Articles (5.91)	2812,688	2,177,580	1,592,095	1,683,434
Wholesale of Textile, Clothing and Footwear (0.67)	3,561	4,781	3,151	3,310
Retail Sale of Textiles, Clothing, Footwear and Leather Goods (0.67)	115,999	155,549	102,453	107,576
Retail Sale of Household Appliances, Articles and Equipment (0.67)	1,249	1,677	35,935	37,732
Retail Sale of Hardware, Paints and Glass (0.39)	1,251	1,680	36,002	37,803
Other Retail Sale in Specialized Stores (0.67)	2,524	3,389	72,614	76,246
Washing and Dry Cleaning of Textiles and Fur Products (0.49)	2,981	4,002	2,635	2,768
Engineering, Architectural and Technical Services (9.15)	15,485,635	85,654,263	62,515,002	55,411,289
Total Employee Income	20,285,051	89,982,242	65,035,416	58,383,139

Source: Statistical Abstract (2009).

As shown in Table 20, the manufacture of wood and cork products, except furniture, made the highest contribution to employment between 2007 and 2008, although it was overtaken by the manufacture of glass products and manufacture of furniture in 2009 and 2010 respectively. In 2009, the manufacture of glass products employed about 836 people (or 40% of total partial copyright industry employee numbers), followed by the manufacture of furniture, employing 516 people (25%).

Table 20: Employee Numbers in Partial Copyright-Based Industries in Tanzania, 2007-2010

Activity	2007	2008	2009	2010
Manufacture of Textiles (0.49)	64	72	58	60
Manufacture of Wearing Apparel, Dressing and Drying of Leather (0.69)	1	1	1	1
Manufacture of Luggage, Handbags, Saddlers and Footwear (0.67)	3	4	10	10
Manufacture of Leather and Related Products (0.67)	8	9	10	10
Manufacture of Rubber and Plastic Products (0.67)	48	46	28	29
Manufacture of Glass Products (0.39)	170	179	836	96
Retail Sale of Glass and Hardware (0.39)	1	1	1	1
Manufacture of Wood and Cork Products Except Furniture (41.00)	933	952	319	325
Manufacture of Furniture (19.74)	520	479	516	502
Manufacture of Jewellery and Related Articles (5.91)	5	4	2	2
Wholesale of Textile, Clothing and Footwear (0.67)	4	5	4	4
Retail Sale of Textiles, Clothing, Footwear and Leather Goods (0.67)	132	117	120	123
Retail Sale of Household Appliances, Articles and Equipment (0.67)	46	52	42	43
Retail Sale of Hardware, Paints and Glass (0.39)	46	52	42	43
Other Retail Sale in Specialized Stores (0.39)	93	104	85	87
Washing and Dry Cleaning of Textiles and Fur Products (0.49)	3	4	3	3
Total Employee Numbers	2,077	2,081	2,077	1,339

Source: Statistical Abstract (2009).

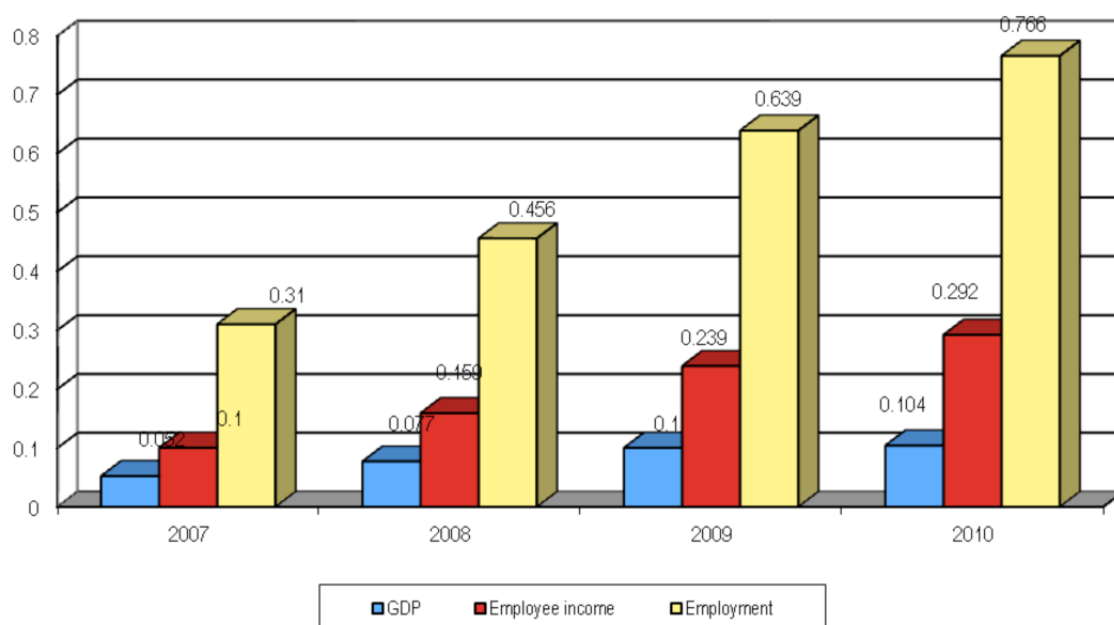
4.6 Economic Contribution of Non-Dedicated Support Industries

NDSIs together contributed between TZS 6.636 billion and TZS 16.646 billion of value added in the period 2007-2010. This formed about 0.05-0.1% of the total national value added over the same period. Concerning the contribution to employee income, NDSIs generated between TZS 1.393 billion and 5.045 billion, translating to about 0.1-0.3% of the total national income generated for employees between 2007 and 2010. With respect to employment, the industries together had between 1,958 and 5,982 employees, or about 0.3-0.8% of employees nationally (Table 21, Figure 18).

Table 21: Economic Contribution of Non-Dedicated Support Industries in Tanzania, 2007-2010

Year	Value Added		Employee Income		Employee Numbers	
	TZS	% contribution GDP	TZS	% contribution to national income	Head/Number	% contribution to national employment
2007	6,636,468,597	0.052	1,393,247,776	0.100	1,958	0.310
2008	10,671,127,425	0.077	2,385,293,414	0.159	3,097	0.456
2009	14,871,486,986	0.100	3,843,337,707	0.239	4,646	0.639
2010	16,646,030,407	0.104	5,045,498,049	0.292	5,982	0.766

Figure 18: Economic Contribution of Non-Dedicated Support Industries in Tanzania, 2007-2010 (%)



Total retail trade in 2009 provided the highest value added compared with all the other NDSIs. Total retail trade contributed TZS 3.936 billion (or 27% of the total value added for NDSIs). This was followed by clearing and forwarding, which contributed TZS 3.685 billion, or 25%. Courier activities were the lowest contributor, with TZS 54.354 million, or just 0.4% (Table 22).

Table 22: Value Added by Non-Dedicated Support Industries in Tanzania, 2007-2010

Activity	2007	2008	2009	2010
Total Wholesale	994,077,068	2,151,412,137	2,020,192,527	2,294,963,710
Total Retail Trade	1,543,914,833	2,743,009,443	3,935,910,210	4,480,977,019
Inland Water Transport	806,917	3,754,476	76,746,805	3,156,407
Scheduled Air Transport	35,526,472	5,022,790	16,176,233	75,556,680
Other Transport	932,126,609	2,504,860,280	2,955,841,354	2,837,828,768
Cargo Handling	379,636,303	327,057,789	658,092,724	870,524,279
Activities of Travel Agencies and Tour Operators	516,772,929	887,301,733	1,142,167,269	715,027,735
Activities of Other Travel Agencies (Car Rentals)	29,373,363	50,646,822	61,955,611	145,785,626
Courier Activities Other than National Post Services	24,236,121	46,095,435	54,354,214	46,155,096
Telecommunications	48,587,180	64,333,723	203,427,288	277,661,578
Telephone and Fax Center	5,447,510	28,830,185	61,303,497	23,457,544
Clearing and Forwarding	2,125,963,292	1,858,802,612	3,685,319,254	
Total Value Added	6,636,468,597	10,671,127,425	14,871,486,986	11,771,094,442

Source: Statistical Abstract (2009).

As presented in Table 23, in 2009 total retail trade made the highest contribution in employee compensation in the non-dedicated industries, with TZS 2.759 billion, or about 72% of the total employee compensation for all the non-dedicated industries, which was TZS 3.843 billion. "Activities of other travel agencies" was the second contributor, with TZS 256.015 million, translating to about 7%.

Table 23: Employee Income from Non-Dedicated Support Industries in Tanzania, 2007-2010

Activity	2007	2008	2009	2010
Total Wholesale	9,236,808	20,004,600	18,774,000	21,344,400
Total Retail Trade	1,082,124,420	1,922,551,176	2,758,667,652	3,229,153,200
Inland Water Transport	8,762	7,957	146,725	307,125
Scheduled Air Transport	11,923,498	1,685,849	51,896,700	242,392,500
Other Transport	5,642,812	15,165,825	171,178,650	164,335,500
Cargo Handling	25,270,158	21,752,399	43,743,722	57,896,074
Storage and Warehousing	112,398,311	96,841,679	194,825,735	257,747,246
Other Supporting Transport Activities	14,019	12,732	226,294	3,114,230
Activities of Travel Agencies and Tour Operators	2,222,076	3,814,370	46,968,525	29,867,374
Activities of Other Travel Agencies (Car Rentals)	124,867,960	215,322,240	256,014,780	602,406,000
National Post Activities	1,711,896	2,952,259	35,259,360	82,958,400
Courier Activities Other than National Post Services	53,726	102,903	1,180,080	1,008,000
Telecommunications	1,391,984	1,841,613	56,894,160	77,649,600
Internet Cafes	898,685	1,188,710	36,725,520	50,131,200
Telephone and Fax Center	15,482,661	82,018,860	170,253,360	225,187,200
Total Employee Income	1,393,247,776	2,385,263,172	3,842,755,263	5,045,498,049

Source: Statistical Abstract (2009).

In relation to employment, retail trade provided the greatest contribution in 2009, with 3,537 people, or 76% of the total employee numbers for NDSIs, which amounted to 4,646 persons that year. This was followed by "other transport", which had 304 employees, or 7% of NDSI employment (Table 24).

Table 24: Employee Numbers in Non-Dedicated Support Industries in Tanzania, 2007-2010

Activity	2007	2008	2009	2010
Total Wholesale	11	24	22	25
Total Retail Trade	1,387	2,465	3,537	4,140
Inland Water Transport	1	1	1	1
Scheduled Air Transport	203	29	92	431
Other Transport	96	258	304	292
Cargo Handling	13	11	22	29
Storage & Warehousing	56	48	97	128
Other Supporting Transport Activities	1	1	1	1
Activities of Travel Agencies & Tour Operators	38	65	83	52
Activities of Other Travel Agencies (Car Rentals)	89	54	183	430
National Post Activities	21	36	44	104
Courier Activities Other than National Post Services	1	1	1	1
Telecommunications	17	22	71	97
Internet Cafes	11	15	46	63
Telephone & Fax Center	13	67	142	188
Total Employee Numbers	1,958	3,097	4,646	5,982

Source: Business Survey (2008); Statistical Abstract (2009).

5. External Trade in Copyright-Based Industries in Tanzania

This chapter analyzes the overall performance of copyright-based industries with respect to foreign/external trade. The performance of an industry in external trade reflects the share of a country's industry in the world economy. It has been shown that copyright industries in Tanzania made a sizeable contribution to foreign trade.

5.1 Exports for Copyright-Based Industries

Table 25 shows the contribution of copyright-based industries to Tanzania's national exports. As this table shows, the proportional contribution of the industries was highest in 2007, before declining in 2008, increasing in 2009 and then declining again in 2010.

In 2007 the copyright-based industries contributed a total of TZS 163,420,008,892, or 7.3% of the total national exports of TZS 2,236,955,979,056. In 2008, they contributed 6%, in 2009 they recorded 6.9%, and in 2010 they contributed 6%.

Table 25: Exports of Copyright-Based Goods and Services in Tanzania, 2007-2010

Description	2007	2008	2009	2010
Total Core Copyright Industries	1,140,542,810	5,432,341,597	2,436,651,905	710,096,715
Total Interdependent Copyright Industries	63,284,208,986	168,541,514,265	104,919,964,292	244,582,008,431
Total Partial Copyright Industries	98,870,888,077	22,594,398,370	137,272,519,556	71,679,421,711
Total Non-Dedicated Copyright Industries	124,369,019	604,501,768	887,365,977	1,147,899,095
Total Copyright Industries	163,420,008,892	197,172,756,000	245,516,501,730	318,119,425,952
Total National Exports	2,236,955,979,056	3,293,456,682,985	3,568,070,868,823	5,286,770,215,821

5.2 Exports for Core Copyright Industries

Generally, the proportional contribution of core copyright industries increased between 2007 and 2008, before decreasing between 2008 and 2010. The total value of exports of core copyright industries increased sharply from 2007 to 2008, moving from TZS 1.141 billion to TZS 5.432 billion, before exhibiting a drastic decrease in 2009 and 2010 (Table 26).

The core copyright industries contributed about 0.1% of the total national export value in 2007. In 2008, the core copyright industries contributed about 0.2%, a considerable increase from the previous year. There was, however, a reduction in 2009, when the core copyright industries contributed about 0.1% of the total national exports for that year. The core copyright industries contributed their lowest values in 2010, with about 0.01%, a sharp reduction compared with 2008 and 2009 (Table 26).

Table 26: Proportion of Total Export Value of Core Copyright Industries to the National Export Value in Tanzania, 2007-2010

Export Value	2007	%	2008	%	2009	%	2010	%
Total Value of Export for Core Industries	1,140,542,810	0.05	5,432,341,597	0.17	2,436,651,905	0.07	710,096,715	0.01
Total National Export	2,236,955,979,056	100	3,293,456,682,985	100	3,568,070,868,823	100	5,286,770,215,821	100

Table 27 provides the export values of the sub-sectors (or activities that fall under them) of the core copyright industries. The dramatic arts, music and other artistic activities contributed the majority of value to the core copyright industries in 2007 – about 79.7% of the total core copyright industries in that year. In the following year, however, this changed, as publishing, printing and reproduction of recorded media did better, contributing about 88.5% of the total contribution of core copyright industries.

Table 27: Export Values for Sub-Sectors of Core Copyright Industries in Tanzania, 2007-2010

Sub-Sector	2007	2008	2009	2010
Publishing, Printing and Reproduction of Recorded Media	231,261,533	4,807,704,978	2,321,764,551	381,872,106
Dramatic Arts, Music and Other Artistic Activities	909,281,277	624,636,619	114,887,354	328,224,609
Total Core	1,140,542,810	5,432,341,597	2,436,651,905	710,096,715

Source: TRA Summary Report.

5.3 Exports for Interdependent Copyright Industries

The contribution of interdependent copyright industries to the national economy almost doubled between 2007 and 2008, before experiencing a slight decrease in 2009, after which it increased again in 2010. The industries recorded the highest values in 2008 in terms of proportional contribution to the national exports. In 2007, the industries contributed about 2.8% of the total national exports, before increasing to about 5.1% in the following year. In 2009, the interdependent copyright industries dropped slightly, contributing about 2.9% before again increasing to 4.6% in 2010.

The proportion of national export value contributed by the interdependent copyright industries was the highest in 2008 (5.1%) followed by the 2010 figure of about 4.6%. The lowest contribution was made in 2007 (Table 28).

Table 28: Proportion of Total Export Value of Interdependent Copyright Industries to the National Export Value in Tanzania, 2007-2010

Export Value	2007	%	2008	%	2009	%	2010	%
Total Values of Exports for Interdependent Industries	63,284,208,986	2.80	168,541,514,265	5.12	104,919,964,292	2.94	244,582,008,431	4.63
Total National Exports	2,236,955,979,056	100	3,293,456,682,985	100	3,568,070,868,823	100	5,286,770,215,821	100

Among the sub-sectors of the interdependent industries, electrical equipment and supplies remained the highest contributor in terms of export value between 2007 and 2009, only being overtaken by the pulp, paper and paperboard sub-sector in 2010. The sub-sectors of musical instruments and professional and scientific equipment remained among the lowest contributors in terms of exports throughout the years of study (Table 29). In 2010, for example, electrical equipment contributed about 35.1%, which was second after the pulp, paper and paperboard sub-sector, which contributed about 39.6%, while musical instruments contributed only 0.3%.

Table 29: Export Values for Sub-Sectors of Interdependent Copyright Industries in Tanzania, 2007-2010

Sub-Sector	2007	2008	2009	2010
Pulp, Paper and Paperboard	14,648,992,890	29,784,837,179	29,322,482,303	96,818,269,204
Chemicals and Chemical Products	6,154,781,260	9,779,391,331	12,818,021,439	14,089,837,944
Photographic and Optical Goods	1,186,558,996	3,551,832,155	3,519,747,718	13,140,676,977
Professional and Scientific Equipment	6,725,652	143,709,576	81,400,504	139,449,196
Electrical Equipment	37,035,375,895	124,482,129,378	55,517,934,624	85,804,606,824
Household Appliances, Radio and TV Goods	3,331,256,183		3,198,331,954	33,041,900,263
Musical Instruments	21,010,962	94,255,569	2,624,809	607,231,055
Other Manufactured Goods	899,507,148	705,359,077	459,420,941	940,036,968
Total Interdependent	63,284,208,986	168,541,514,265	104,919,964,292	244,582,008,431

Source: TRA Summary Report.

5.4 Imports for Core and Interdependent Copyright Industries

The value of imports remained higher than that of exports during the period 2007 to 2010. This can be attributed to the fact that most equipment used in the production of these core copyright industries is not manufactured in Tanzania. The total raw import value of the core copyright industries decreased steadily between 2007 and 2009, before increasing sharply in 2010. However, this does not necessarily translate to a percentage change in contribution to the national imports, as their value neither decreased nor increased.

In 2007, the core copyright industries contributed about 0.5% of national imports, while in 2008 they contributed about 0.4%. In 2009 and 2010, the copyright industries contributed just under 0.4% of the national imports (Table 30). In terms of percentage contribution to the national imports, the highest was recorded in 2007 while the lowest was in 2010.

In 2007, the interdependent copyright industries contributed approximately 17.6% of the total national imports, while in 2008 the contribution stood at about 13.2%. In 2009, they contributed 16.9%, while in the subsequent year they contributed approximately 14.3%. These data show that the highest percentage contribution was recorded in 2007, while the lowest was in 2008 (Table 30).

Table 30: Imports of Copyright-Based Goods and Services in Tanzania, 2007-2010

Description	2007	%	2008	%	2009	%	2010	%
Total Core Copyright Industries	37,264,432,438	0.51	36,987,627,512	0.42	35,936,863,425	0.43	40,086,272,058	0.36
Total Interdependent Copyright Industries	1,285,959,127,175	17.64	1,164,536,620,250	13.17	1,430,232,869,413	16.93	1,579,765,717,632	14.25
Total Partial Copyright Industries	49,366,684,147	0.68	58,334,968,199	0.66	70,126,462,128	0.83	76,616,264,869	0.69
Total Non-Dedicated Copyright Industries	20,799,548,520	0.26	45,974,934,237	0.52	30,593,743,195	0.36	59,201,700,460	0.53
Total Imports	1,393,389,792,280	19.09	1,305,834,150,198	14.77	1,566,889,938,161	18.55	1,755,669,955,019	15.83
Total National Imports	7,291,405,414,113	100	8,839,817,118,357	100	8,446,720,722,512	100	11,086,877,422,981	100

Table 31 provides import values for the sub-sectors of core copyright industries. Publishing, printing and reproduction of recorded media accounted for the bulk of the core copyright industries throughout the period 2007 to 2010.

Table 31: Import Values for Sub-Sectors of Core Copyright Industries in Tanzania, 2007-2010

Sub-Sector	2007	2008	2009	2010
Publishing, Printing and Reproduction of Recorded Media	36,054,819,287	35,783,604,998	35,193,088,996	39,608,633,500
Dramatic Arts, Music and other Artistic Activities	1,209,613,151	1,204,022,514	743,774,429	477,638,558
Total Imports	37,264,432,438	36,987,627,512	35,936,863,425	40,086,272,058

Source: TRA Summary Report.

The values of imports of the various sub-sectors of the interdependent copyright industries are provided in Table 32. Imports of electrical equipment had the highest values throughout the period 2007 to 2010. Chemicals and chemical products were second, while musical instruments attributed the least value. In 2010, electrical equipment contributed about 41.4% of the total value of imported products of interdependent copyright industries, while in the same year chemicals and chemical products contributed about 35.8%. Musical equipment, which remained the lowest contributor throughout the period, recorded a value of

0.04% in 2010. Electrical equipment had the highest value, perhaps because electrical equipment is essential in production within many copyright industries.

Table 32: Import Values for Sub-Sectors of Interdependent Copyright Industries in Tanzania, 2007-2010

Sub-Sector	2007	2008	2009	2010
Pulp, Paper and Paperboard	85,488,478,305	1,255,659,280	108,462,940,065	144,704,827,605
Chemicals and Chemical Products	436,092,458,195	310,412,063,324	421,995,314,839	564,926,052,499
Photographic and Optical Goods	87,091,539,787	92,344,796,830	195,075,485,708	95,131,634,448
Professional and Scientific Equipment	776,381,071	1,098,862,845	1,136,706,410	9,832,469,717
Electrical Equipment	667,742,991,708	674,695,038,978	605,568,255,721	654,650,590,754
Household Appliances, Radio and TV Goods	59,815,455,606	74,711,476,579	84,912,345,556	93,155,755,935
Musical Instruments	423,849,502	395,163,715	760,976,693	659,907,630
Other Manufactured Goods	8,283,613,151	9,623,558,699	12,320,844,421	16,704,479,044
Total Imports	1,285,959,127,175	1,164,536,620,250	1,430,232,869,413	1,579,765,717,632

Source: TRA Summary Report.

5.5 Exports and Imports for Partial Copyright Industries

The values of exports of the various sub-sectors of the partial copyright industries are provided in Table 33. The sub-sector of jewellery and related articles was generally the highest contributor throughout the period of study, followed by materials of wood and cork products, except furniture. Partial copyright industries in 2009 contributed about TZS 137.273 billion (3.8% of the total national exports).

Table 33: Export Values for Sub-Sectors of Partial Copyright Industries in Tanzania, 2007-2010

Sub-Sector	2007	2008	2009	2010
Materials of Textiles (0.49)	311,128,767	419,191,018	776,881,325	823,588,432
Wearing Apparel (0.69)	73,106,566	87,763,318	72,842,678	381,540,150
Luggage, Handbags and Footwear (0.67)	24,189,542	19,215,169	38,314,825	259,142,972
Articles of Leather, Saddlers and Related Products (0.67)	290,608	1,264,784	484,012	94,895,060
Materials of Rubber and Plastic (0.67)	346,653,410	278,774,146	229,356,698	5,210,097,774
Materials of Glass and Glass Products (0.78)	45,821,092	67,519,557	86,597,305	354,611,428
Materials of Wood and Cork Products Except Furniture (41.00)	13,326,198,051	13,530,381,580	18,411,188,911	12,304,935,834
Jewellery and Related Articles (11.92)	84,541,383,544	6,089,694,565	117,491,120,799	44,119,180,512
Structural Clay Products (4.68)	98,675,712	68,335,107	36,124,105	3,751,724,781
Pottery, China and Earthenware (4.68)	72,279,164	2,726,709	10,042,381	872,099,612
Toys and Games (45.83)	31,161,621	2,029,532,417	119,566,517	3,507,605,156
Total Exports	98,870,888,077	22,594,398,370	137,272,519,556	71,679,421,711
Total National Exports	2,236,955,979,056	3,293,456,682,985	3,568,070,868,823	5,286,770,215,821

Source: TRA Summary Report.

Regarding imports, the sub-sector of jewellery and related articles contributed the bulk, amounting to TZS 117.491 billion (or 67% of total imports in 2009 for partial copyright industry products). This amounted to 0.5% of total national imports. The sub-sector of materials of wood and cork products, except furniture, was second, with a contribution of about 18% of the total imports for partial copyright industries for that particular year. Partial copyright industries contributed about 1% of the total national imports in 2009. In general, the sub-sector of materials of rubber and plastic recorded the highest values throughout the period between 2007 and 2010 (Table 34).

Table 34: Import Values for Sub-Sectors of Partial Copyright Industries in Tanzania, 2007-2010

Sub-Sector	2007	2008	2009	2010
Materials of Textiles (0.49)	545,705,202	588,446,109	676,905,049	823,857,359
Wearing Apparel (0.69)	155,395,942	254,217,899	275,202,747	381,540,150
Luggage, Handbags and Footwear (0.67)	156,605,101	167,137,179	200,736,200	259,142,972
Articles of Leather, Saddlers and Related Products (0.67)	72,481,894	67,225,863	80,785,409	94,895,060
Materials of Rubber and Plastic (0.67)	2,626,868,656	2,186,200,352	3,533,668,363	5,210,097,774
Materials of Glass and Glass Products (0.78)	178,091,049	188,287,223	317,588,886	354,611,428
Materials of Wood and Cork Products Except Furniture (41.00)	6,300,159,899	10,420,352,069	12,470,144,978	12,304,935,834
Jewellery and Related Articles (11.92)	34,578,524,965	39,355,063,919	46,718,740,431	48,025,845,020
Structural Clay Products (4.68)	1,926,333,088	2,231,904,395	2,763,423,109	3,751,724,781
Pottery, China and Earthenware (4.68)	623,554,317	636,332,529	646,875,886	872,099,612
Toys and Games (45.83)	2,202,964,034	2,239,800,662	2,442,391,070	4,537,514,879
Total Imports	49,366,684,147	58,334,968,199	70,126,462,128	76,616,264,869
Total National Imports	7,291,405,414,113	8,839,817,118,357	8,446,720,722,512	11,086,877,422,981

Source: TRA Summary Report.

5.6 Exports and Imports for Non-Dedicated Copyright Industries

Regarding non-dedicated copyright products, the sub-sector of “other transport” remained the best performer in terms of exports, contributing TZS 696 million (or 78% of the total exports of the NDSIs), translating to 0.2% of the total national export values for the year 2009. This was followed by scheduled air transport, which contributed 0.005% of the total national export values. The NDSIs contributed 0.03% of the total national export values for the year 2009 (Table 35).

Table 35: Export Values for Sub-Sectors of Non-Dedicated Copyright Industries in Tanzania, 2007-2010

Sub-Sector	2007	2008	2009	2010
Inland Water Transport	3,649,628	779,964	956,663	39,422,873
Scheduled Air Transport	2,776,663	259,820,071	190,400,582	140,897,442
Other Transport	117,942,728	343,901,733	696,008,732	967,578,780
Total Exports	124,369,019	604,501,768	887,365,977	1,147,899,095
Total National Exports	2,236,955,979,056	3,293,456,682,985	3,568,070,868,823	5,286,770,215,821

Source: TRA Summary Report.

Table 36 shows that, in 2009, the “other transport” sub-sector was the highest contributor of all the non-dedicated industries, contributing 90.6% of the total imports for non-dedicated products, translating to 0.32% of the total national imports that year. This was followed by scheduled air transport, which contributed 0.024% of the total national import values. Total non-dedicated copyright industries contributed about 0.36% of the total national import values.

Table 36: Import Values for Sub-Sectors of Non-Dedicated Copyright Industries in Tanzania, 2007-2010

Sub-Sector	2007	2008	2009	2010
Inland Water Transport	214,659,387	473,606,108	854,739,010	1,902,811,734
Scheduled Air Transport	1,215,991,755	6,724,548,243	2,032,944,607	4,526,456,677
Other Transport	19,368,897,378	38,776,779,886	27,706,059,578	52,772,432,049
Total Imports	20,799,548,520	45,974,934,237	30,593,743,195	59,201,700,460
Total National Imports	7,291,405,414,113	8,839,817,118,357	8,446,720,722,512	11,086,877,422,981

Source: TRA Summary Report.

5.7 Balance of Trade in Copyright-Based Industries

Table 37 compares the copyright-based industries in terms of their exports, imports and trade balances in Tanzania in 2009. Only partial copyright industries recorded a positive trade balance. The value of exports in the group of core copyright-based industries in 2009 was about TZS 2.4 billion, which accounted for about 0.1% of the total national exports. On the other hand, the value of imports was about TZS 35.9 billion, comprising 0.4% of all imports. The core copyright-based industries registered a negative trade balance of about TZS 33.5 billion.

The value of exports for partial copyright-based industries was about TZS 137.3 billion, which accounted for 3.9% of the total national exports, while the value of imports was about TZS 70.1 billion, constituting 0.8% of all national imports. The relative contribution of partial copyright-based industries to exports was about 60 times that of core copyright-based industries, suggesting that the former had a higher local component with an external market compared with the latter.

Table 37: Tanzania's Balance of Trade in Copyright-Based Goods and Services in Tanzania in 2009

Industry	Exports	% of Total National Economy	Imports	% of Total National Economy	Trade Balance (Exports minus Imports)
Core	2,436,651,905	0.07	35,936,863,425	0.43	-33,500,211,520
Interdependent	104,919,964,292	2.91	1,430,232,869,413	16.93	-1,325,312,905,121
Partial	137,272,519,556	3.85	70,126,462,128	0.83	67,146,057,428
Non-Dedicated	887,365,977	0.03	30,593,743,195	0.36	-29,706,377,218
TOTAL COPYRIGHT INDUSTRIES	24,551,6501,730	6.88	1,566,889,938,161	18.55	-1,321,373,436,431
Total National Economy	3,568,070,868,823	100	8,446,720,722,512	100	-4,878,649,853,689

The shares of exports and imports among copyright industries in Tanzania in 2009 are shown in Figures 19 and 20. Partial industries made the highest contribution to exports (56%), followed by interdependent industries (43%), while the country spent the most in importing interdependent copyright products (92%), followed by partial copyright products (4%).

Figure 19: Export Shares among Copyright-Based Industries in Tanzania in 2009 (%)

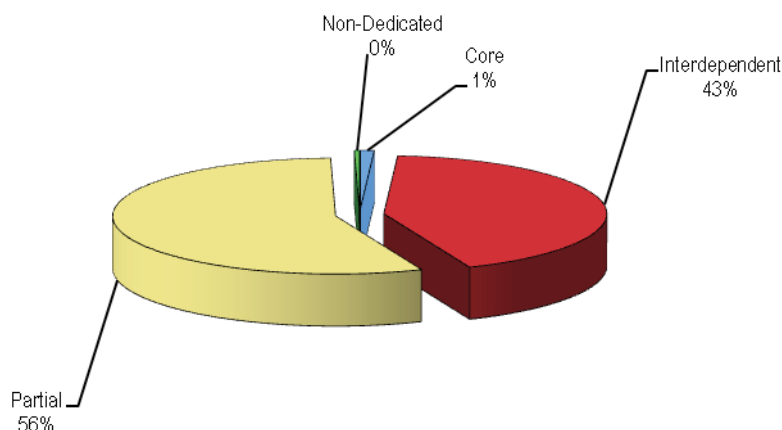




Figure 20: Import Shares among Copyright-Based Industries in Tanzania in 2009 (%)

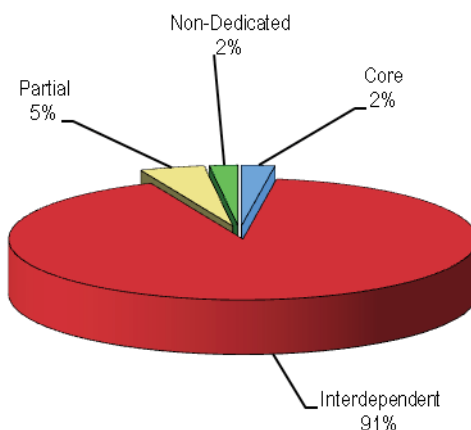


Figure 21 presents the contribution of the various copyright-based industries in terms of exports and imports relative to Tanzania's total national economy in 2009. This clearly demonstrates that while the partial copyright-based industries contributed more export value than import cost compared with the national economy, all of the copyright-based industries combined produced a relatively lower export value than import value when compared with the whole economy.

Figure 22 further illustrates the enormous national trade deficit compared with that in the copyright-based industries, mainly contributed by the interdependent copyright industries. Proportionally (see Table 37), imports were more than six-fold (6.4 times) greater than exports in the overall economy, while they were only about double (2.4 times) the exports in the total copyright-based industries, implying that, comparatively, the copyright-based industries are performing worse than the overall national economy.

Figure 21: Contribution of Exports and Imports of Copyright-Based Industries to Tanzania's National Economy in 2009 (%)

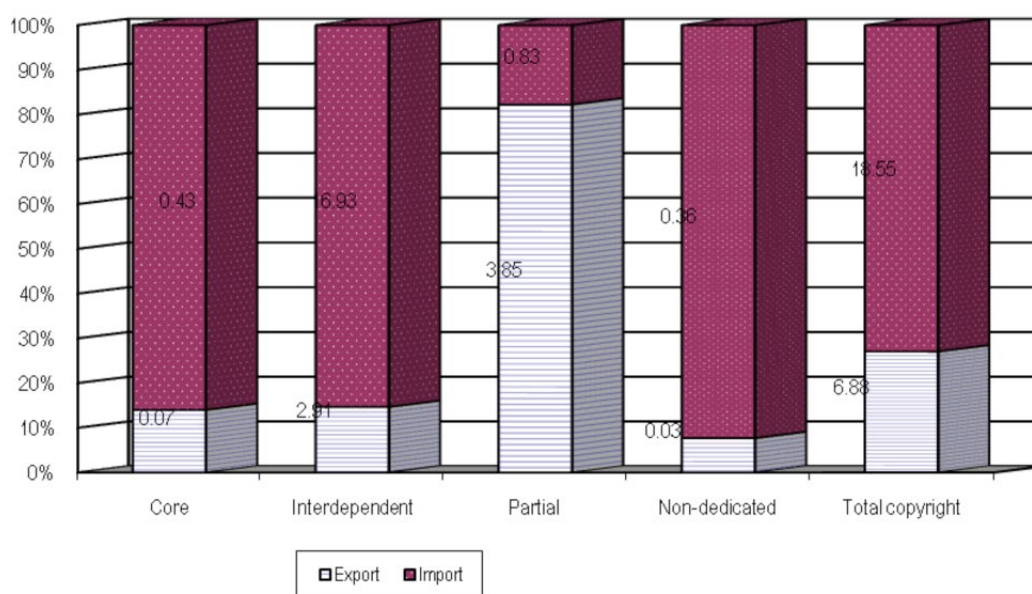
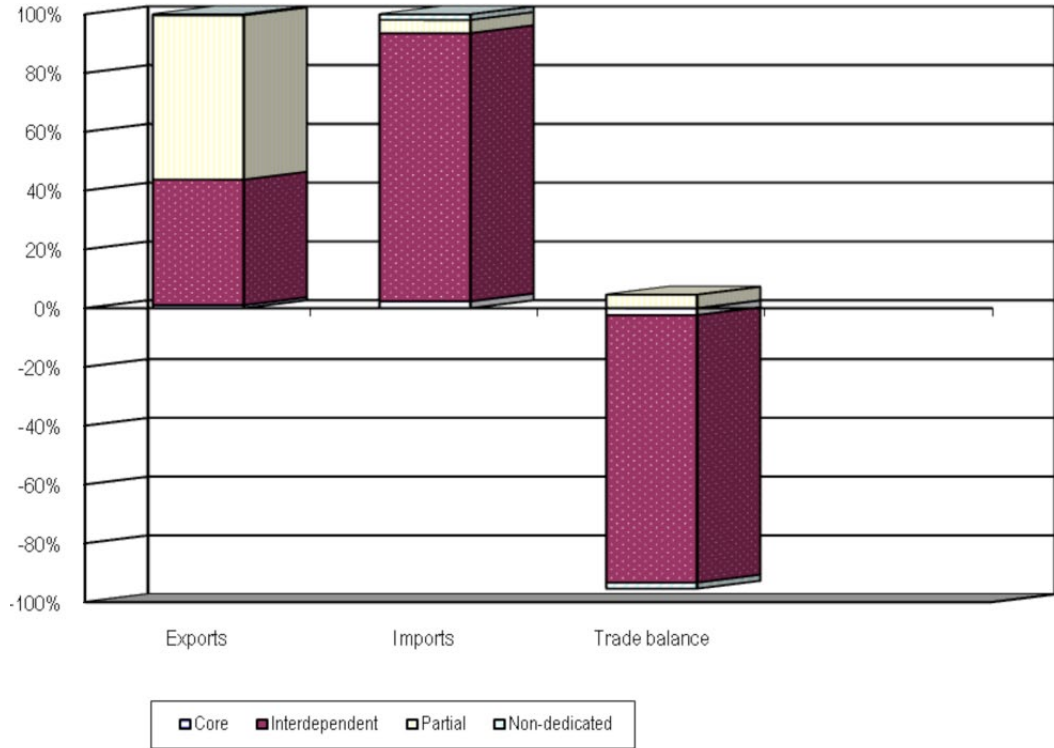


Figure 22: Proportions Contributed by Copyright-Based Industries to Exports, Imports and Trade Balance in Tanzania in 2009 (%)

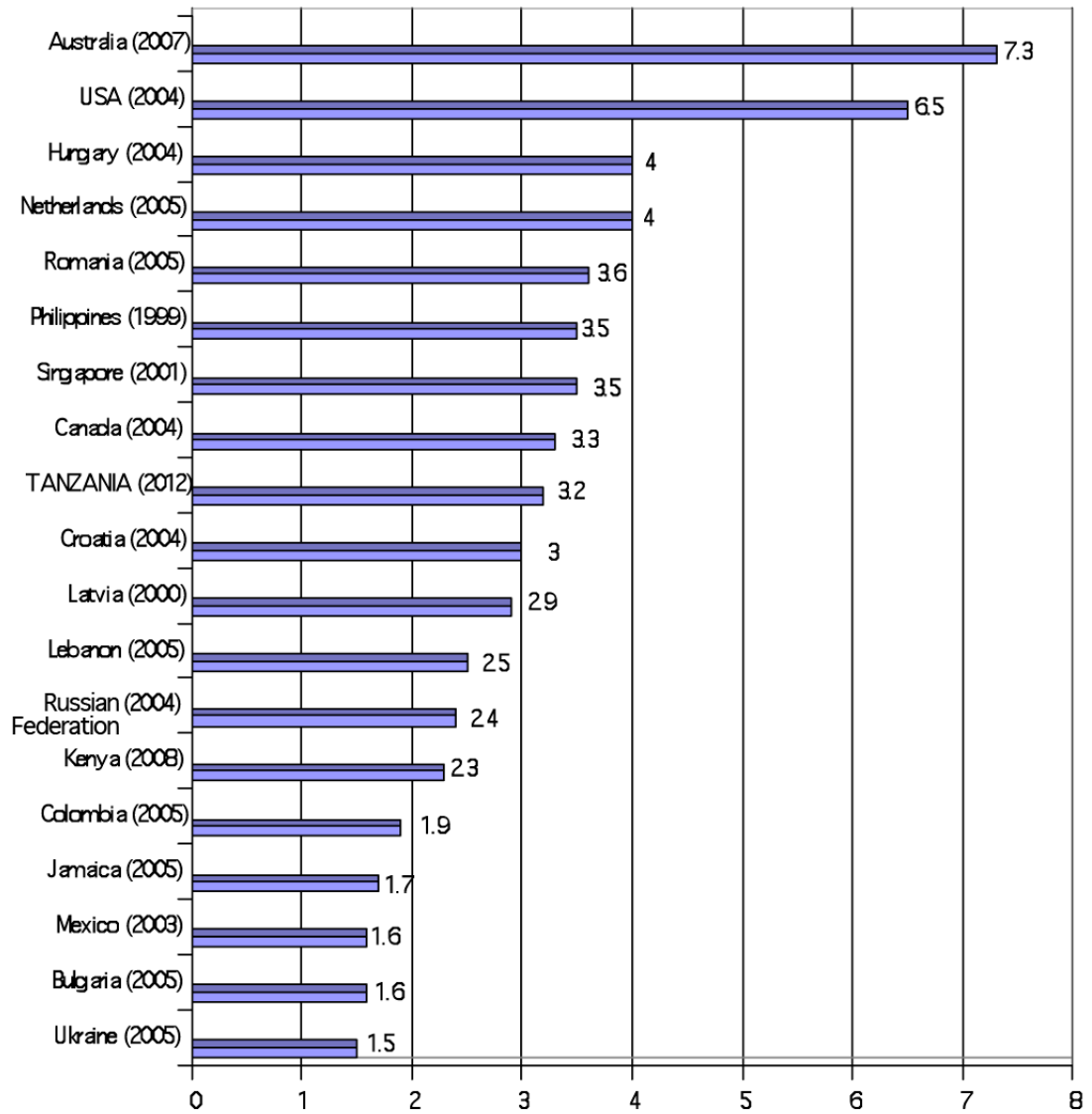


6. Comparison of Tanzania's Study Results with Previous Studies

This chapter provides a comparison of the results of this study of Tanzania based on 2009 data with results of similar studies carried out in various countries using the WIPO guide. While the statistics generally provide a picture of the international situation, they nevertheless represent different years of study (shown in brackets in the figures), and this therefore may not present a perfect comparison. The countries compared with Tanzania include Kenya, Singapore, the United States of America, Hungary, Jamaica, Colombia, and the Netherlands, among others. Kenya was the first Sub-Saharan African country to complete this kind of study, in 2008, and therefore provides a good comparison, particularly because of its proximity and similar economic structure to Tanzania.

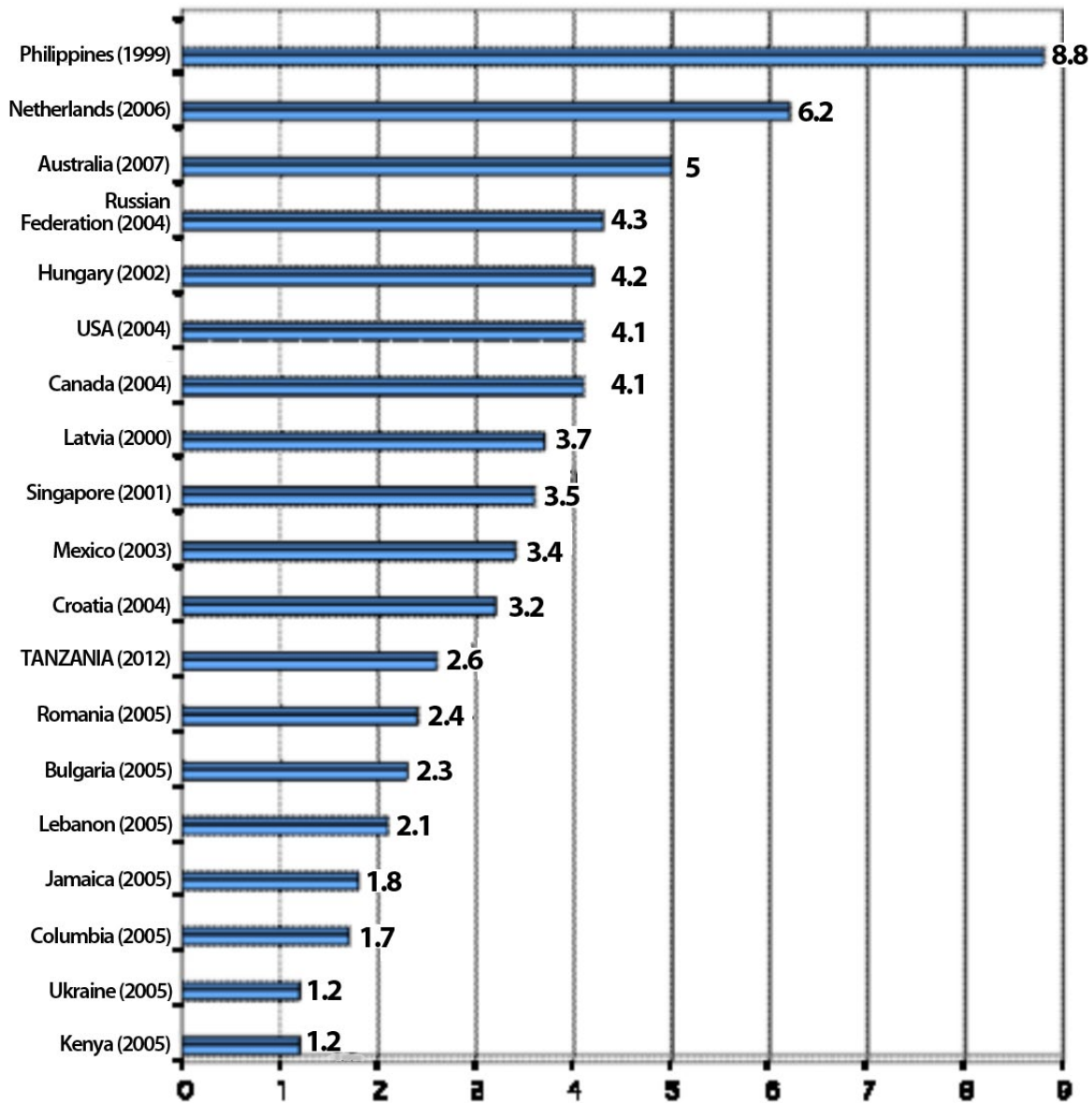
The results of the Tanzania study are to some extent consistent with those of Kenya and most other countries. Tanzania's core copyright industries contributed about 3.2% to the GDP in 2009. This performance is better than that of 11 countries, including Croatia (3%), Latvia (2.9%), Lebanon (2.5%), the Russian Federation (2.4%), and Kenya (2.3%). So far, among the available results from studies based on the WIPO Guide, Australia records the highest (7.3%), while Ukraine (1.5%) is the lowest performing, based on value added by core copyright industries. These results indicate that, out of the 19 countries compared, Tanzania is placed ninth in terms of the importance of the copyright industries to its economy (Figure 23).

Figure 23: International Comparison of the Contribution of Core Copyright-Based Industries to GDP (%)



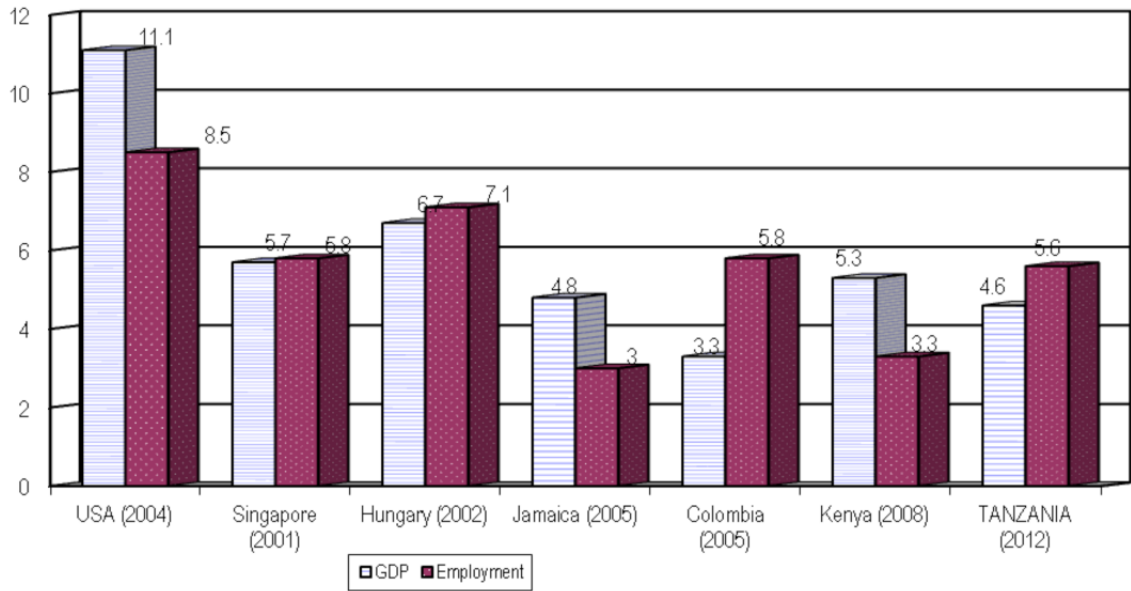
Tanzania also performed well with regard to the proportion of national employment contributed by the core copyright-based industries. A value of 2.6% placed it above seven countries, namely Romania (2.4%), Bulgaria (2.3%), Lebanon (2.1%), Jamaica (1.8%), Colombia (1.7%), Kenya (1.2%) and Ukraine (1.2%) (Figure 24).

Figure 24: International Comparison of the Contribution of Core Copyright-Based Industries to Employment (%)



We also compare the contributions of the total copyright-based industries to GDP and employment between Tanzania and six other countries: a Sub-Saharan country (Kenya), the United States of America, a European Union country (Hungary), an Asian country (Singapore), a Caribbean country (Jamaica), and a country from Latin America (Colombia). The results indicate that Tanzania performed fairly well, comparing well with Kenya, Colombia, Jamaica and Singapore (Figure 25).

Figure 25: International Comparison of the Total Copyright-Based Industries to GDP and Employment (%)



7. A Review of Developments of Selected Core Copyright-Based Industries in Tanzania

This chapter presents profiles and development trends of some of the core copyright industries. The chapter seeks to explain briefly the trends and important issues regarding press and literature, music, theatrical production, opera, film production and videos, radio and television, and business and professional associations.

7.1 The Media

“The media” is a term that collectively represents radio, television, magazines and newspapers.⁹ The media is an important player in any society, Tanzania included, as it serves to inform and educate the public about what is happening, daily or occasionally. Media also plays an important role in entertainment, as many radio stations play music that is an important component in people’s daily lives.

The audience in Tanzania presents varied demands to the media, as many people listen to radio, read newspapers and take part in educative programs. In Tanzania, radio remains people’s most popular home-based pastime. *Dala dalas* (public transport vehicles) also have radios, which tune in to local stations to entertain the passengers.

Approximately 60% of Tanzanian households have a radio set. The literacy rate is over 85%, so the majority of the population can read and write.

7.2 The Press and Literature

7.2.1 Tanzania Newspapers

Newspapers in Tanzania represent various interests and tastes, depending on the readers. Since the advent of multi-party politics in the country, many newspapers have sprung up. Newspapers are written in both English and Kiswahili (Table 39), but English newspapers are more dominant in terms of numbers. Most newspapers in Tanzania report day-to-day events, especially politics, social and economic issues.¹⁰ Table 38 is, however, not exhaustive, as some tabloids are not included.

Ownership of the newspapers is mixed, with some owned privately while others are state-owned. The income of most newspapers and periodicals derives mainly from sales to readers and advertising. Print media is the largest advertising medium in Tanzania.

Other than the dailies, a large number of weekly and other assorted periodicals are published in Tanzania. These are presented in Box 2.

⁹ http://www.tanzania.go.tz/mass_media.html

¹⁰ <http://www.pressreference.com/Sw-Ur/Tanzania.html>

Table 38: Daily Newspapers and Languages of Publication in Tanzania

Name of newspaper	Language	Circulation/Day (Copies)
Arusha Raha	Kiswahili	N/A*
Arusha Times	English	N/A
Business Times	English	N/A
The Citizen	English	N/A
Daily News	English	50,000
The Express	English	N/A
The Guardian	English	N/A
Kafoi Online	English and Kiswahili	N/A
Mwananchi	Kiswahili	N/A
Raia Mwema	Kiswahili	N/A
Tanserve	English	N/A
Tanzania Daima	Kiswahili	N/A
The African	English	N/A
Alasiri	Kiswahili	N/A
The Democrat	English	15,000
Kipanga (Kite)	Kiswahili	N/A
Majira (Times)	Kiswahili	15,000
Nipashe (Inform me/Information)	Kiswahili	N/A
Uhuru (Freedom)	Kiswahili	100,000
Mtanzania (The Tanzanian)	Kiswahili	N/A

*N/A = Data not available.

Box 2: Weekly and Other Periodicals

Weeklies:

Business Times, published in Dar with a circulation of 15,000 copies.

The Express, published in Dar with a circulation of 20,000 copies.

Government Gazette, published in Zanzibar for official government announcements.

Mfanyakazi (The Worker), published in Dar with a circulation of 100,000 copies.

The Family Mirror, published in Dar.

Mzalendo (The Patriot), published in Dar with a circulation of 115,000 copies.

Leta Raha (Bring Comfort), published in Dar.

Nipashe Jumapili (Sunday Information), published in Dar.

Sunday News, published in Dar with a circulation of 50,000 copies.

Sunday Observer, published in Dar.

Taifa Letu (Our Nation), published in Dar.

Kweupe (Open Space), published in Zanzibar by the Information and Broadcasting Services.

Other Periodicals:

The African Review, the periodical is produced twice per year with a circulation of approximately 1,000. It is a journal of African politics, development and international affairs and it is published by the Political Science department at UDSM.

Eastern African Law Review, also published twice yearly with a circulation of approximately 1,000 copies.

Taamuli, which means “thought”. It is produced in Dar twice yearly published by the Political Science department at UDSM.

Elimu Haina Mwisho, Swahili for “education has no end” or “perpetual education”, is published in Mwanza monthly with a circulation of about 45,000 copies.

Habari za Washirika (Union News), which is published in Dar monthly by the Co-Operative Union of Tanzania and has a circulation of 40,000.

Jenga (Build), (DSM, Journal of the National Development Corporation), with a circulation of 2,000.

Kiongozi (The Leader), is published fortnightly by the Roman Catholic Church with a circulation of 33,500.

Mlezi (The Guardian), published every two months and with a circulation of 8,000.

Mwenge (The Torch), published monthly with a circulation of 10,000.

Nchi Yetu (Our Country), published monthly in Dar with a total circulation of 50,000.

Nuru (The Light), which is the official Zanzibar Government publication published twice monthly with a circulation of approximately 8,000 copies.

Safina (The Ship), published in Dar with a circulation of 10,000.

Sauti ya Jimbo (Voice of the Province), published in Dodoma quarterly by the Anglican Diocese.

Sikiliza (Listen), published quarterly in Morogoro by the Seventh Day Adventist Church with a circulation of 100,000 copies.

Tantravel, published in Dar quarterly.

Tanzania Trade Currents, published twice monthly in Dar with a circulation of 2,000 copies.

Uhuru na Amani (Freedom and Peace), published in Arusha quarterly, by the Evangelical Lutheran Church in Tanzania with a circulation of 15,000 copies.

Ukulima wa Kisasa (Modern Farming), published twice monthly in Dar by the Ministry of Agriculture with a circulation of 15,000 copies.

Kiswahili is the national language of Tanzania. The leadership and the people of Tanzania are fully educated in Kiswahili, and all debates in parliament are in this language. Tanzania is one of the few countries in Sub-Saharan Africa where Kiswahili is appreciated, and this has had an impact on the development of the press. The reason for this is that Tanzania as a country has experienced historical events that have not occurred elsewhere. Kiswahili, which is a Bantu language with some Arabic loan words, was developed due to the influence of traders from Yemen and Oman.¹¹

Kiswahili's strongest presence has been along the coast and adjacent islands and is due to Arab immigration and traders who went very deep into the interior, as far as the Congo (formerly Zaire) and Malawi. The Arab incursion into the African interior from the Tanganyika coast was the first engine for the spread of Kiswahili.

The Maji Maji revolt, the union between the islands of Zanzibar and Tanganyika, and Germany's language policy for Tanzania, contributed greatly to the spread of the Kiswahili language. During the Maji Maji revolt, which was an uprising against the German colonial rulers, Kiswahili as a language acted as a unifying

¹¹ <http://www.pressreference.com/Sw-Ur/Tanzania.html>

force. Later on, the German colonial policy adopted Kiswahili language for inter-ethnic communication and communication between the African population and German colonial administrators.¹²

The union between the islands of Zanzibar and Tanganyika promoted the spread of Kiswahili as the primary language, and the union has had the continuing impact of promoting the Kiswahili language. The policies of the first President, Julius Nyerere, (famously known as Mwalimu, meaning “teacher”) also contributed immensely to the spread of Kiswahili, as he helped establish the language as the official as well as the national language. Kiswahili therefore replaced English as the language of instruction through to the secondary school level, with a strong Kiswahili language department at the University of Dar-es-Salaam, and an equally viable Institute of Kiswahili Research (Taasisi ya Uchunguzi wa Kiswahili, TUKI), which has been incorporated into the university system. However, English still retains a strong presence at all levels in Tanzanian society. This is partly due to the benefit of English as an international language.¹³

7.2.2 *The Press and Law in Tanzania*

Although the Tanzanian constitution, through Article 18, guarantees every Tanzanian the right to freedom of opinion and expression, the Newspaper Act of 1976 allows authorities within the government, including the President, the power to prohibit publications that might be deemed not to be in the nation’s best interest.

The Broadcasting Services Act of 1993 provides that private broadcasters are only allowed to send their signals to 25% of the country. To an extent, this limits private broadcasters, although the government views it as a way of ensuring national cohesion.¹⁴

The Newspaper Act of 1976 (Act No. 3/1976) gives the President of the United Republic of Tanzania powers to prohibit any publication to be imported or printed if he/she finds that it jeopardizes national interest. It also gives the minister responsible for information the power to prohibit the publication of a newspaper, and furthermore provides that it will be an offense if any person sells, prints or distributes a prohibited publication. This Act also licenses print media organizations.

The Broadcasting Service (Act. No. 6/1993) establishes several functions. The commission outlined under Section 6(1) of the Broadcasting Act No. 6/1993 issues broadcasting licenses, and regulates and supervises broadcasting activities. The commission is responsible for standardization, planning and management of the frequency spectrum.

Although in the past the media could not report on news relating to state officials, this has changed, as today the papers report freely. The papers sometimes go as far as discussing democratic principles, but they are more cautious in questioning the election outcomes. Sometimes, however, they will compare one government official to another, but only in a measured way.

The relationship between the media and the state in Tanzania has been occasionally tense because, despite the censorship issues, many papers still expose and criticize political events and personalities. The Tanzanian media has continued to be an important source of information for the society. The Internet is emerging as another important source of information, especially in the major cities: for example, there is a cyber café on almost every street of Dar-es-Salaam.

English-language newspapers from United Kingdom and the United States of America are regularly available in every major town, with most readers being foreign nationals and the elite Tanzanians. There is a large Asian community in Tanzania, which is strongly bilingual in English and Kiswahili, in addition to being fluent in their various ethnic Indian-Pakistani languages, such as Gujarati or Urdu. Their reading preferences remain the local English-language papers and the British and American papers and journals.

¹² <http://www.pressreference.com/Sw-Ur/Tanzania.html>

¹³ <http://www.pressreference.com/Sw-Ur/Tanzania.html>

¹⁴ http://www.tanzania.go.tz/mass_media.html

7.3 Radio and Television

7.3.1 Radio

Unlike other large colonial territories in Africa, such as Kenya, Zambia, and Nigeria, broadcasting was late arriving in Tanganyika due to the presence of a relatively small settler population compared with other territories that had large numbers of settlers demanding a radio station.¹⁵

The development of radio in Tanzania can be traced back to 1951, when a British Broadcasting Corporation (BBC) official proposed establishing an experimental station to produce local programs for a native audience. This led to the founding of Sauti ya Dar-es-Salaam,¹⁶ which initially produced a single one-hour program in Kiswahili each week. The name was eventually changed to Tanganyika Broadcasting Service (TBS) in around 1954.

Soon after independence, the new government saw radio as their best means of linking the villages with the government and motivating people to take pride in their country and to try to make it better. This can be simplified by Nyerere's famous remark that, while others were trying to reach the moon, they were trying to reach the villages using the radio.

The TBS was an independent service, so the newly independent government found it difficult to use TBS to propagate government policies. Therefore, in 1965, TBS was nationalized and its name was changed to Radio Tanzania Dar-es-Salaam (RTD), with the Ministry of Information being the manager. Apart from propagating government policies, RTD also provided entertainment and educational programs to school-going children.

Although RTD did not initially have a wide reach, it had acquired higher power transmitters by the mid 1980s, giving it a good signal across Tanzania. Radio became the main medium of reaching the entire country, with even remote villages being reached by the RTD signal.

During Mwalimu Nyerere's term of office, Tanzania became a one-party state, "not due to dictatorship", but because of what Mwalimu described as the need to promote national cohesion. During the same period, RTD became the main broadcaster. However, things started to change with the adoption of a free market economy. This led to the emergence of a chain of medium wave stations in major towns across the country.

RTD still maintains its long-standing reputation as a public service broadcaster. However, it is also now adapting to meet the commercial challenges of an increasingly competitive media environment. To keep younger listeners from straying too much to foreign stations, RTD is giving more attention to sports and modern music.

RTD is the only radio transmission that is allowed countrywide, alongside the national television network (Televisheni ya Taifa). As mentioned earlier, only 25% of the country receives broadcasts from private stations. Kiswahili is again strongly promoted, but not at the expense of English. The promotion or prominence of Kiswahili is usually at the expense of Tanzania's other indigenous ethnic languages. Kiswahili is not squeezed in between English-language programs: rather there are Kiswahili-language radio stations alongside English-language ones. Almost every adult in Tanzania has a radio. Currently, there are more than 50 radio stations in Tanzania. Some of the current national and regional radio stations on the Tanzanian mainland are shown in Table 39, while Table 40 provides information on the two types of radio services – commercial and non-commercial. RTD was later transformed again, to Tanzania Broadcasting Corporation (TBC).

¹⁵ <http://www.pateplumaradio.com/genbroad/tanzania.html>

¹⁶ <http://www.tbc.go.tz/~tbcgo/about-tbc/background-information.html>

Table 39: Some National and Regional Radio Stations in Mainland Tanzania

Name	Authorized Service Area	Location of Base Station
Radio One	National	Dar-es-Salaam
Radio Free Africa	National	Mwanza
Radio East Africa FM	National	Dar-es-Salaam
Clouds Entertainment	National	Dar-es-Salaam
TBC Taifa	National	Dar-es-Salaam
TBC FM	Regional	Dar-es-Salaam
Radio Kwizera	Regional	Ngara
Radio Tumanini	Regional	Dar-es-Salaam
Passion FM	Regional	Dar-es-Salaam
Radio Kiss FM	Regional	Mwanza
Radio Sauti ya Injili	Regional	Moshi
Radio Maria	Regional	Songea
Radio Uhuru FM	Regional	Dar-es-Salaam
Radio Mwangaza FM	Regional	Dodoma
Radio Imaa FM	Regional	Morogoro
Capital Radio	Regional	Dar-es-Salaam
Times Radio FM	Regional	Dar-es-Salaam
Safina Radio FM	Regional	Arusha
Sibuka FM	Regional	Maswa
Radio 5 Arusha	Regional	Arusha
Radio Ebony FM	Regional	Iringa
Radio Kili FM	Regional	Moshi
Country FM	Regional	Iringa
Classic FM Radio	Regional	Dar-es-Salaam
Magic FM Radio	Regional	Dar-es-Salaam
Radio chemi chemi	Regional	Sumbawanga
Radio Saut FM	Regional	Mwanza

Source: The Tanzania Communications Regulatory Authority (TCRA).

Table 40: Commercial and Non-Commercial Radio Services in Mainland Tanzania

Type	Commercial	Non-Commercial	Total
National Radio	3	2	5
Regional Radio	4	3	7
District Radio	17	18	35
Total	24	23	47

7.3.2 Television

Before 1995, Mainland Tanzania did not have a television station, although people with television sets in some parts of Tanzania could access programs from Kenya and Television Zanzibar (TVZ). Television broadcasting began from Dar-es-Salaam in 1995. But Zanzibar opened its first television station in 1972, the Television Zanzibar (TVZ). TVZ was inaugurated in 1973 and it broadcast in Kiswahili and the English language, and carried both local and international programs.¹⁷ TVZ covers the islands of Unguja and Pemba, and its signal reaches Dar-es-Salaam, Tanga, Bagamoyo and the coastal belt of the Tanzanian mainland, and up to Mombasa in Kenya.

¹⁷ <http://www.jamiiforums.com/habari-na-hoja-mchanganyiko/29107-history-of-television-zanzibar-tvz.html>

Private television stations have mushroomed in urban areas. They transmit local programs and relay internationally broadcast programs from CNN, BBC World News and Deutsche Welle. The stations are in Dar-es-Salaam, Morogoro, Arusha and Mwanza. There is a reasonably wide distribution of television sets. International news outlets like CNN, BBC World News and Al-Jazeera are commonly available on television and are watched avidly. These are the primary sources of international news for the vast majority of Tanzanians.

There are currently about 30 television stations in Tanzania. Table 41 gives a list of some of the regional and national television stations.

Table 41: Some National and Regional Television Stations in Tanzania

Name	Authorised Service Area	Location of Base Station
Independent Television ITV	National	Dar-es-Salaam
Star TV	National	Mwanza
Channel Ten	National	Dar-es-Salaam
TBC 1	National	Dar-es-Salaam
East Africa TV	National	Dar-es-Salaam
Agape TV	Regional	Dar-es-Salaam
C2C TV	Regional	Dar-es-Salaam

Source: The Tanzania Communications Regulatory Authority (TCRA).

With the introduction and enactment in Tanzania of the Electronic and Postal Communication Act No. 3 (2010), the electronic communication industry has experienced a remarkable achievement of growth. The main objective of the Act is to put in place a comprehensive regulatory framework for electronic and postal communication services. This is achieved through the TCRA. The law addresses a number of important issues, including, among others, the establishment of National Computer Emergency Response Teams. The role of these teams is to ensure recognition of Tanzania's pride and identity in cyberspace by providing proper oversight of the dot-TZ country code top-level domain, and the migration from analogue to digital broadcasting. Other objectives of the Electronic and Postal Communication Act are shown in Box 3:

Box 3: Other Objectives of the Electronic and Postal Act

To keep abreast of the law with changes in the communication sector.	To establish a Computer Emergency Response Team to advise and handle cyber threats.
To consolidate the Broadcasting Services Act, Cap. 306 and the Tanzania Communication Act, Cap. 302.	To establish a National Consultative Spectrum Committee.
To put in place a legal framework for convenience.	To establish a new postal addressing system or Postcode.
To establish a Central Equipment Identification Register.	To introduce Digital Broadcasting.
To introduce registration of SIM cards.	To enhance penalties on any act or omission concerning offenses related to electronic communications, SIM card and postal communications and other related offenses.
To regulate competitive practices and conduct in the electronic communication and postal sectors.	

The TCRA is a quasi-independent government body responsible for regulating the communications and broadcasting sectors in Tanzania. It was established under the Tanzania Communications Regulatory Authority Act No. 12 (2003), which merged the Tanzania Communications Commission and the TBC. The Authority is a statutory body established as part of the government policy reforms in the communication sector, with the aim of improving the availability of the info-communications services to the public as well as allowing new players into the market.

Another recent phenomenon in Tanzania in the development of television is digital broadcasting. The introduction of digital technology can be traced to the 1990s, when it was introduced in Europe. However, it was not until 1997 that the Digital Terrestrial Television Broadcasting (DTTB) standards were fully achieved through the process of migration from analogue to digital broadcasting. Since then, other services such as voice, data, and the Internet have migrated from analogue to digital technology.

In Tanzania, the migration process from analogue to digital was initiated in 2005 by issuing the First Public Consultation Document on how digital broadcasting should be managed, regulated and implemented. In 2006, the Second Public Consultation Document was issued on the need to establish Multiplex Operators. The Ministry of Communication, Science and Technology, the Ministry of Information, Culture and Sports and the TCRA are responsible for this migration. The TCRA regulates the ICT, broadcasting and postal sectors under the umbrella of two ministries.

7.4 Film and Music

In Tanzania today, the film and music industries are two of the most successful and well-developed examples of creative industries. The local music industry, for example, has carried with it some aspects of Tanzanian culture, with most musicians producing songs with local and traditional tunes, which are cultural in nature. It is important to note that, in Africa, culture is central to societal development and, if well harnessed, could spur economic growth and development.

If culture is used as a dynamic process, it can become a tool for social change and can be used for the creation of awareness, behavior modulation, advocacy, therapy, and the mobilization of social support. Culture and development may be defined as a framework in which cultural factors and actions influence the process of development at local levels. This has impacted greatly on the music and film industries in Tanzania, as many consumers of music or film have a tendency to prefer locally produced songs or films. In contrast to the past, when local radio airwaves were flooded with foreign music, local stations are today awash with locally produced songs and films, which are becoming popular with consumers. This aspect of culture is therefore sold as a commodity in the market related to creativity, and so is a boost to economic growth.

The power of culture and the creative industries cannot be underestimated. These industries have contributed to remarkable developments elsewhere in the world. A case in point is how theatre contributed to the fall of the Marcos regime in the Philippines and the Samoza regime in Nicaragua.

7.4.1 The Film Industry

The film industry has become a profitable venture in Tanzania, although it is still working with small budgets and still needs to be upgraded in terms of quality and profitability through increasing investments in the sector. Some of the factors inhibiting the growth of the film industry in Tanzania are lack of foreign exchange, foreign control of distribution, and the fact that domestic markets are too small to effectively demand the film products and support the industry.

The film industry in Tanzania can be traced back to the 1930s, when Tanzania was chosen as the site for the International Missionary Council's Bantu Education Kinema Experiment (BEKE), which was a tribute to the British faith in the power of film as an agent to increase the literacy levels of Africans. The first cinema hall was opened in 1929. However, there was serious censorship of what was consumed by Africans, as the colonial government was very concerned that unrestricted access could lead to a rebellion.

Shortly after, BEKE, the colonial government, through the colonial film unit, started to produce educational, entertainment and propagandistic films. At around the same time, mobile cinema units were introduced and toured the whole country, showing newsreels and films supplied by the Central Office of Information (COI) in London.

In 1948, the film unit, which was a governmental unit responsible for documenting important government events, started local production of films. This then led to the establishment of the Tanzania Film Company (TFC) in 1968. The TFC was replaced by the Audiovisual Institute (AVI) formed in 1974, which continued to play the role of a government documentary unit. AVI also produced educational documentaries, which were used in educational institutions.^{18,19}

¹⁸ <http://afraf.oxfordjournals.org/content/88/352/389.extract>

¹⁹ <http://www.filmbirth.com/tanzania.html>

7.4.2 The Music Industry

In the past few years, the Tanzanian music industry has seen many changes. The changes have brought a mix of influences from other countries, along with the original feel of local musical traditions. Tanzania boasts of being home to some of the best artists in East Africa.

The local musicians have developed a new style, christened “Bongo Flavor”, commonly known as “Bongo fleva”, which is a blend of all sorts of melodies, beats, rhythms and sounds. Tanzanian music consumers have developed a preference for products from their local artists, who sing in Kiswahili.

The first music craze in Tanzania can be traced to the early 1930s. This is when Cuban Rumba was widespread. This period also saw young Tanzanians organizing themselves into dance bands, like the Dar-es-Salaam Jazz Band, which was founded in 1932. Bands like Morogoro Jazz and Tabora Jazz were formed during the same period.

After independence in 1961, the state system that was set up led to state-owned bands like the National Union of Tanganyika Workers (NUTA), which led to the formation of the NUTA Jazz Band (currently known as Msondo Jazz Band or Bana Mwambe), the Dar-es-Salaam District Council (DDC) Jazz Band, the Usafiri Dar-es-Salaam (UDA), a public transport company, Jazz Band, the Prisons Department (Magereza) Jazz Band, and many more. During this period, the musicians were paid salaries plus a percentage of the gate collection, and worked for various government departments.

Over the years, the music industry in Tanzania has evolved to a mix of all genres of music. The industry has also seen the mushrooming of hip-hop and reggae artists producing these genres in the Kiswahili language. This has led to Tanzanian artists being celebrated outside the country.²⁰ Tanzanian music has also been influenced by music from the Democratic Republic of Congo, which has contributed to the development of mixed-genre music.

7.5 Copyright Office, Collective Management Organization and Other Copyright Organizations

7.5.1 Copyright Society of Tanzania (COSOTA)

In Tanzania, there is only one joint Copyright Office and Collective Management Organization. This is COSOTA, which is a statutory body set up by the Tanzania Government under the Ministry of Industry and Trade. It was established under Section 46 of the Copyright and Neighbouring Rights Act, No. 7 (1999) and is mandated to administer the Copyright Act.

The functions of COSOTA are:

- Promotion and protection of the interests of authors, performers, translators and publishers, and in particular to collect and distribute any royalties or other remuneration accruing to them in respect of their rights.
- Maintenance of registers of works, productions, and associations of authors, performers, translators, producers of sound recordings, broadcasters and publishers.
- Provision of publicity on the rights of owners and giving evidence of ownership of these where there is a dispute or an infringement.
- Printing and publishing or circulating any information, reports, periodicals, books, pamphlets, leaflets, or any other material relating to copyright, expressions of folklore and neighboring rights.
- Advising the Minister on all matters under the Act.

The above functions mean that COSOTA was set up to help in collectively administering the rights of authors, performers, producers of sound recordings and broadcasters. The Society acts as a link between the owners of the rights on the one hand and the users of their works on the other, hence the authority of the Society to collect royalties on behalf of the rights owners.

²⁰ http://en.wikipedia.org/wiki/Music_of_Tanzania

The efforts of COSOTA are geared towards ensuring that the owners of the rights receive adequate remuneration from their efforts. Therefore, the aims of the Society are:²¹

- To represent and defend the interests of its members in Tanzania and abroad.
- To administer on an exclusive basis within Tanzania such economic rights of its members as the Society may determine.
- To collect fees from users of the works on behalf of its members and distribute those fees among the members.
- To help in the preparation of standard forms of contract for the benefit and use of its members.
- To foster harmony and understanding between rights owners and users of their works as are necessary for the members' economic rights.
- To make reciprocal agreements with foreign societies for the issue of authorizations in works and for the collection and distribution of copyright fees deriving from those works.

COSOTA has also given the mandate to the Reproduction Rights Society of Tanzania (KOPITAN) to deal with reprographic rights in Tanzania. KOPITAN has been funded by KOPINOR and NORCODE since 2009.

The copyright law is currently (i.e. at the time of this study) being amended and the separation of COSOTA and the Copyright Office is among the issues being considered.

Professional organizations also exist, the objectives of which include overseeing the development of their sectors and promoting the interest of their stakeholders. However, these are not collective management organizations. These professional organizations are discussed briefly below.

7.5.2 Book Development Council of Tanzania (BAMVITA)

The Book Development Council of Tanzania (BAMVITA) was established in 1999 with the aim of coordinating and stimulating the activities of all stakeholders in the book industry of Tanzania.²² The intention was to ensure production of high-quality books in Tanzania.

Thus, the objectives of BAMVITA are:

- To support, encourage and liaise with associations involved in the development of a reading culture and books, and urge for the formulation of such associations where there is a need.
- To formulate plans and policies regarding the development of the book industry, and to present the plans to the government and private stakeholders as a means of coordinating the efforts of all concerned parties.
- To improve performance in the book sector by identifying training needs and facilitating the provision of such training.
- To establish and maintain a data bank, and issue publicity materials on the Tanzanian book industry.
- To encourage and support the production and provision of childhood reading materials throughout Tanzania.
- To promote books, literature and reading through exhibitions, fairs, children's rural outreach reading programs and children's reading tents, and literary and book prizes.
- To promote gender-balanced literature.

²¹ For further information about COSOTA visit: <http://www.cosota-tz.org/frameset-t5.html>

²² <http://www.bamvita.or.tz/about.asp>

For the purpose of achieving the above objectives, the functions of BAMVITA are outlined as being:

- To coordinate the various activities of the Council member associations, institutions and organizations, and to lobby the government for action and support.
- To promote the book industry through book fairs, book and library weeks, literacy and literary awards, advertising and other activities.
- To collect information and data on all aspects of the book sector through research, consultation and periodic sector surveys, and processing and disseminating such information through reports, publications, news releases on book activities, news bulletins to council members and others in the book sector, catalogues, and brochures.
- To regulate practice in the book sector by standardizing codes of ethics of member associations, institutions and organizations by publicizing violations of copyright and other laws relating to the book sector, and seeking legal action when necessary and possible. Also to improve professional skills by encouraging the establishment of training facilities, courses and seminars to upgrade the personnel in all facets of the book sector.
- To support the development of suitable infrastructures in order to encourage indigenous authorship, editing, illustrating, printing and publishing, and to provide opportunities for local book production.

7.5.3 Booksellers Association of Tanzania (BSAT)

BSAT was established in 1964 and became active when a group of experienced booksellers met and shared their experiences in 1987. It was officially re-registered by the registrar in 1988.²³

The vision of BSAT is to encourage, enhance and sustain a reading culture in the country through a self-sustainable bookselling trade. The mission of BSAT is to improve access to books in Tanzania by developing and organizing Tanzanian booksellers. BSAT is a non-profit making organization of individual booksellers across Tanzania.

7.5.4 Media Council of Tanzania (MCT)

The Media Council of Tanzania (MCT) is an independent, voluntary, non-statutory self-regulatory body established by the media fraternity of Tanzania. The MCT was established on June 30, 1995, at the Journalists and Stakeholders' Convention held in Dar-es-Salaam. It began work on May 22, 1997, when it was officially registered under the Societies Ordinance (1954).²⁴

The mission of the MCT is to create an environment that enables a strong and ethical media that contributes towards a more democratic and just society, while the vision is to push for a democratic Tanzania with a free, responsible and effective media.

The general objective of the MCT is to assist and maintain the freedom of the media in Tanzania. Box 4 lists the specific objectives of the MCT.

²³ <http://.kabissa.org>

²⁴ www.mct.or.tz/mediacouncil

Box 4: Specific Objectives of the MCT

To promote, assist, safeguard and defend the freedom of the media and allied forms of public communication in Tanzania.

To oversee that journalists, editors, broadcasters, producers, directors, proprietors and all those involved in the media industry in Tanzania, adhere to the highest professional and ethical standards.

To receive and conciliate, mediate and or arbitrate upon complaints from the public and among the media against alleged infringements of the Code of Ethics.

To encourage development of the media profession in Tanzania by undertaking activities including, but not limited to, training of journalists, overseeing press club development, and to conduct various media freedom campaigns, seminars, workshops and/or symposia.

To maintain a register of developments likely to restrict the supply of information of public interest and importance, keep a review of the same, and investigate the conduct and attitude of persons, corporations and governmental bodies at all levels, towards the media, and make public reports on such investigations.

To involve members of the public in the work of the Council and constantly and reasonably keep them informed about its operations, views and decisions.

To promote and defend the interests of readers, viewers, and listeners.

To promote gender sensitivity, equality, equity in and balanced reporting and dissemination of information.

To raise funds for the purposes of the Council on such terms as are compatible with the autonomy of the Council and within the spirit of its mission and vision.

To publish papers, journals, newsletters and other materials to achieve these objectives.

To do such other things as may be in the interest of the Council, the media and the public as may be necessary to achieve these objectives.

8. Conclusions and Recommendations

Copyright-based industries in Tanzania make a considerable contribution to the national economy, ranging between 3% and 4.6% of the total GDP, and between 4.5% and 5.7% of the total national employment, as is exemplified by their performance in the period 2007-2010. On the basis of GDP, the performance of these industries in the same period was equal to or better than the hotels and restaurant sector and the mining and quarrying sector. In fact, the core copyright industries alone contributed more than the mining and quarrying sector in 2009 and 2010 (3.2% and 2.8% respectively), underscoring the importance of the copyright-based industries to the economy of Tanzania.

In terms of employee productivity, the core copyright-based industries exhibited impressive productivity, outperforming all other sectors considered except the agricultural, hunting and forestry sector, depicting the significant contribution of these industries to the national economy. However, in terms of labor productivity, the copyright-based industries combined only outperformed the fishing and the hotels and restaurants sectors.

Tanzania's copyright-based industries showed a large negative trade balance, which was mainly a result of the interdependent copyright industries, implying that copyright industries have a relatively high import component of interdependent copyright categories of goods, which reduces their overall added value. This foreign trade imbalance can be corrected through appropriate and operational policy frameworks.

Copyright-based industries in Tanzania face several challenges that require attention. Some of these are specific to Tanzania, while some generally affect other countries, especially those in the developing world. As demonstrated by the growth of GDP between 2007 and 2010, the copyright industry sector is one of the rapidly growing sectors in Tanzania.

As in many other countries, the value of this sector is, however, not well recognized as an important driver for national development. It is important, therefore, to promote this recognition. In addition to the government's inadequate interest in providing all the required data to determine the true contribution of this sector, the rapid growth rate of the industry has also made it difficult for the government to keep track of its activities. Therefore, for the most part, copyright industries in Tanzania have been operating informally, and much of their contribution is not reflected in the government tax books. This implies that the industry's contribution to the GDP is likely to be higher than that computed from the available data.

Databases on the contribution of creative industries in Tanzania, similar to Kenya, for which data are available, are highly aggregated. Additionally, the composition of copyright-based industries is not well harmonized in the Tanzania national accounts. This is a possible source of inaccuracy in estimations of the contribution of these industries. In order to circumvent this problem, Tanzania's classification system should correspond to ISIC classifications. Further to this, it would be useful to coordinate and standardize the collection of data on copyright-based industries, and indeed any other data, among major government departments such as the NBS and TRA.

Another impediment to the development of creative industries is piracy, which is normally considered to pose a serious challenge in developing countries. Those involved in the business of creative industries are said to frequently evade taxes, either in the effort to avoid exposing themselves so that they may protect their products from piracy because of the absence of adequate IP protection, or because their businesses operate illegally or stock pirated materials, and would be reluctant to make any disclosures. These factors can lead to poor or no documentation, and therefore inadequate databases.

Despite the challenges facing copyright-based industries in Tanzania, the economic contribution of these industries is noteworthy. Tanzania's performance regarding these industries compares very well with its neighbor, Kenya. Indeed, other than the contribution to GDP, Tanzania's industries generally performed better than Kenya's on the basis of employee income and employee numbers, which were actually greater proportionally than in several countries in Europe, Asia and the Americas.

To strengthen and streamline the activities of the copyright industries, relevant policies should be put in place and existing policies should be reinforced to make them more effective in improving the operational efficiency

of the industries. This will, in turn, encourage the development of the industries, through creating an enabling environment for the government to harness the benefits that they provide, which will subsequently lead to a greater recognition of their value in the creation of wealth.

This study is among the few to have been completed in the African continent. It has captured the dynamism of copyright-based industries in Tanzania, albeit over a short period of four years. This calls for regular and consistent monitoring and evaluation, given the fast growth rate of these industries.

9. Appendices

Appendix I: Sample Questionnaires

1. Consumer (Household) Survey Questionnaire

1. Date of interview:/...../2011.
Questionnaire No:
2. Name of enumerator:
3. Name of respondent:
4. Occupation:
5. How much did you spend in total purchases last year? (TSHs)
6. How much did you spend in purchasing these products/services last year? (TSHs)

Item	Price (TSHs)
Textile Products	
Leather and Related Products	
Wearing Apparel and Dressing Products	
Rubber and Plastic Products	
Glass Products	
Wood and Cork Products Except Furniture	
Furniture	
Jewellery and Related Articles	
Clothing and Footwear	
Structural Clay Products	
Household Appliances, Articles and Equipment	
Pottery, China and Earthenware	
Hardware, Paints and Glass	
Museum Activities and Preservation of Historical Sites	
Other Retail Sales in Specialized Stores	
Botanical and Zoological Gardens and Nature Reserves	
Washing and Dry Cleaning of Textiles and Fur Products	
Engineering, Architectural and Technical Services	
Totals	

2. *Copyright Industry (Activity) Survey Questionnaire*

Industry:

1. Date of interview:/...../2011.

Questionnaire No:

2. Name of enumerator:

3. Name of respondent:

Designation in business/company/organization:

4. Name of organization/business/activity/individual

5. Location of the business:

6. Sex of the respondent:

(1) Male

(0) Female

7. When was your business/company/organization established?.....

8. Are you a member of any association/society? If yes, list them:

.....

.....

9. How much did you make in sales last year?

10. What was the number of employees and their wages in your business/company/organisation last year?

Number of employees:

Total salaries/wages (TSHs.):

11. How much money did you pay as Value Added Tax last year? (TSHs)

12. Do you know of any person who is involved in a similar activity? If yes, fill in the table below (Use separate sheet if list is long):

Producer	Location

Appendix II: Table of Performance of Copyright Industries in Tanzania, 2007-2010

Copyright Industries	Gross Domestic Product (GDP) ²⁵		Employee Incomes		Employee Numbers	
	Million TZS	%	Million TZS	%	People	%
Year 2010						
Core copyright industries	445,504,374,830	2.797	20,742,872,602	1.200	20,079	2.570
Interdependent copyright industries	218,258,758,647	1.370	51,194,690,617	2.962	16,931	2.168
Partial copyright industries	580,788,572	0.004	58,383,139	0.003	1,339	0.171
Non-dedicated support industries	16,646,030,407	0.104	5,045,498,049	0.292	5,982	0.766
TOTAL COPYRIGHT INDUSTRIES	680,989,952,456	4.275	77,041,444,407	4.457	44,331	5.674
Total national economy	15,930,753,115,599	100	1,728,620,541,470	100	781,266	100
Year 2009						
Core copyright industries	477,083,298,840	3.217	28,272,365,169	1.757	18,616	2.560
Interdependent copyright industries	183,900,961,799	1.240	48,294,231,725	3.000	15,589	2.144
Partial copyright industries	602,576,873	0.004	65,035,416	0.004	2,077	0.29
Non-dedicated support industries	14,871,486,986	0.100	3,842,755,263	0.239	4,646	0.639
TOTAL COPYRIGHT INDUSTRIES	676,458,324,498	4.561	80,474,387,573	5.0	40,928	5.633
Total national economy	14,828,345,000,000	100	1,609,000,000,000	100	727,202	100
Year 2008						
Core copyright industries	443,756,050,480	3.215	27,387,048,990	1.829	19,991	2.953
Interdependent copyright industries	150,640,635,713	1.091	25,917,414,455	1.731	11,746	1.735
Partial copyright industries	1,128,952,495	0.008	89,982,242	0.325	2,081	0.307
Non-dedicated support industries	10,671,127,425	0.077	2,385,263,172	0.159	3,097	0.456
TOTAL COPYRIGHT INDUSTRIES	606,196,766,113	4.392	55,779,708,859	3.724	36,915	5.454
Total national economy	13,801,921,000,000	100	1,497,657,200,000	100	676,880	100
Year 2007						
Core copyright industries	255,098,812,610	1.980	14,968,966,326	1.071	12,247	1.939
Interdependent copyright industries	129,647,192,889	1.001	16,792,895,234	1.201	11,920	1.887
Partial copyright industries	253,061,249	0.002	20,285,051	0.001	2,077	0.329
Non-dedicated support industries	6,636,468,597	0.052	1,393,247,776	0.100	1,958	0.310
TOTAL COPYRIGHT INDUSTRIES	391,635,535,345	3.043	33,175,394,387	2.373	28,202	4.464
Total national economy	12,881,163,000,000	100	1,397,763,464,760	100	631,732	100

²⁵ GDP and employee income in constant prices.

For more information contact WIPO at www.wipo.int

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