

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT  
IN COLLABORATION WITH  
THE GOVERNMENT OF THE REPUBLIC OF ZAMBIA

# STRENGTHENING THE CREATIVE INDUSTRIES FOR DEVELOPMENT

in Zambia

MULTI-AGENCY PILOT PROJECT: ACP/EC/ILO/UNCTAD/UNESCO



Strengthening the Creative Industries  
in Five Selected African, Caribbean and Pacific Countries  
through Employment and Trade Expansion



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**Note**

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Creative Industries Country Studies Series:

No. 1: Strengthening the Creative Industries for Development in Zambia

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## FOREWORD

At UNCTAD's XI Ministerial Conference, held in São Paulo, Brazil, in 2004, more than 150 UN Member States agreed to introduce the topic of creative industries into the international economic and development agenda. Since then, UNCTAD has been shaping a number of international and national policy initiatives in the area of the creative economy and its development dimension.

This policy-oriented country report is the first prepared as part of UNCTAD's involvement in a pilot project on "Strengthening the Creative Industries in Five African, Caribbean and Pacific countries, through employment and trade expansion". This multi-agency undertaking is a component of the ACP-EU Support Programme to Cultural Industries in ACP countries, being jointly implemented by ILO, UNCTAD and UNESCO during 2008-2011.

The main purpose of this study is to assist the Government of Zambia in articulating a development strategy that can optimize the economic potential of the creative sector for job creation, trade expansion and social inclusion. In addition to reviewing current policy in these areas, the report proposes a plan of action to be conducted with the support of relevant United Nations agencies, and an institutional mechanism to facilitate concerted policy actions and interministerial decisions.

The report responds to the specific objectives of the project, which operates within the framework of national priorities to meet two core objectives: (a) providing policy recommendations at enhancing the institutional and regulatory environment in the county; and (b) fostering the development of productive creative capacities, cultural entrepreneurial skills and trade opportunities. Ultimately, the aim is to boost the number and quality of jobs, generate income, increase trade in creative products while promoting cultural diversity and development. Among the expected results are the creation of a participatory methodology, the identification of key creative sectors, and the development of institutional mechanisms and creative capacity<sup>1</sup>.

UNCTAD will continue to assist governments to foster their creative economy. In line with the three pillars of its work: (a) consensus-building, by providing a platform for intergovernmental debates; (b) policy-oriented analysis, by identifying key issues underlying the creative economy and the dynamics of creative industries in world markets; and (c) technical cooperation, by helping developing countries to enhance their creative economies for trade and development gains.

UNCTAD renews its commitment to join the European Commission and the ACP Group of States in this endeavour by recommending concrete measures to take better advantage of the creative potential and cultural richness of ACP countries to foster development.



**Dr. Supachai Panitchpakdi**  
Secretary-General of UNCTAD



**Dr Mohamed Ibn CHAMBAS**  
ACP Secretary-General

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<sup>1</sup> See annex I-1: Logical Framework, from the Project proposal entitled "Strengthening the creative industries in five selected ACP countries through employment and trade".

## ACKNOWLEDGMENTS

This report was undertaken under the overall guidance of UNCTAD's Project Coordinator and Chief of the Creative Economy Programme, Edna dos Santos-Duisenberg, co-author of this country study jointly with Dr. Teresa Hoefert de Turégano, UNCTAD international consultant. Together, they carried out a fact-finding mission in Zambia in July 2008, holding consultations with government officials, and meetings and interviews with stakeholders, visiting relevant institutions, and collecting documentation and factual information. From the UNCTAD secretariat, Carolina Quintana provided research and statistical assistance, Daniel Sanderson provided editorial support and Sophie Combette was in charge of the cover of the publication. Experts from ILO and UNESCO involved in the project were invited to provide comments.

Many people and institutions contributed to this study with their ideas and information, and UNCTAD is greatly indebted to them all. Our special thanks to the representatives of the European Commission in Brussels and Lusaka, in particular, Mr. Jose Valente and Ms. Cesaltina Bastos, as well as to the officials of the ACP Secretariat, in particular Ms. Aya Kasasa, for their institutional and financial support, which was paramount to move ahead this project.

First and foremost, our gratitude goes to the Ministry of Community Development and Social Services, in particular to Mr. Wesley Kaonga, Director of Cultural Affairs and an artist himself, for his committed effort to place creative industries at the centre of the development and economic debate, and for his eagerness to implement the project in Zambia.

Other line ministries that provided insightful comments and support include the Ministry of Commerce, Trade and Industry, the Ministry of Tourism, Environment and Natural Resources, the Ministry of Information and Broadcasting, the Ministry of Science, Technology and Vocational Training, the Ministry of Finance and National Planning, the Ministry of Education and the Ministry of Labour, as did officials from the Department of Culture and the Department of Tourism of Livingstone.

The large number of institutions engaged in the promotion and dissemination of creative industries includes the Zambia National Arts Council, in particular its Chair, Ms. Mulenga Chafihusa, as well as representatives from the National Theatre Arts Association of Zambia, the Zambia National Visual Arts Council, the National Media Arts Association, the Zambia Folk Dance and Music Society, the Zambia Women Writers' Association, the Zambia Association of Musicians, the Zambia Popular Theatre Alliance, the Zambian Association of Chambers of Commerce and Industry, the Zambia Development Agency, the Zambian Federation of Trade Unions, the National Museum, Arts Acres Africa, the University of Zambia, the Zambian Open University, the Lusaka Theatre Club, Southern Africa Communications for Development, the women's organizations WEDAZ and ZFAWIB, the Youth Organization, Muvi Television and Kabwata Cultural Village.

UNCTAD also wishes to thank artists and intellectuals alike, for their creativity and insights which made this exercise a participatory process reflecting the aspirations of the artistic and creative communities and the civil society in general. We thank Mr. William Bwalya Miko, artist/curator/arts and culture consultant, Ms. Norah Mumba, writer/arts adjudicator, Mr. Maik Zulu, musician, Mr Brian Chengala Shakarongo, musician, Mr. Edy Moto, musician/band manager and Mr. Victor Mweetwa, performing artist.

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Finally, UNCTAD wishes to convey its gratitude to the United Nations Resident Coordinator and the offices of the United Nations Development Programme, the International Labour Organization and other relevant international organizations based in Zambia, for their support and cooperation in the context of the implementation of this project.

To everyone who contributed in various ways to the preparation of this policy-oriented study, and to the achievement of the objectives of the Multi-Agency Project for Strengthening the Creative Industries in Zambia through employment and trade expansion, we express our gratitude. We look forward to their continued engagement for a successful implementation of the actions proposed and for the sustainability of a creative economy strategy in the long term to ensure development gains.

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## LIST OF ABBREVIATIONS

ACP	African, Caribbean and Pacific Group of States
AGOA	African Growth and Opportunity Act
ARIPO	African Regional Intellectual Property Organization
ASSITEJ	Association of Theatre for Children and Young People in Zambia
COMESA	Common Market for Eastern and Southern Africa
CSO	Central Statistical Office
DCA	Department of Cultural Affairs
EBZ	Export Board of Zambia
EPA	Economic Partnership Agreement
EU	European Union
FDI	Foreign Direct Investment
GATS	General Agreement on Trade in Services
GDP	Gross Domestic Product
ILO	International Labour Organization
IPR	Intellectual Property Rights
IT	Information Technology
ICT	Information and Communications Technology
LDC	Least developed countries
LLDC	Landlocked developing country
MCDSS	Ministry of Community Development and Social Services
MFNP	Ministry of Finance and National Planning
MTENR	Ministry of Tourism, Environment and Natural Resources
NAC	National Arts Council
NAMA	National Media Arts Association
NATAAZ	National Theatre Arts Association of Zambia
NEPAD	New Partnership for Africa's Development
NGO	Non-governmental organization
NORAD	Norwegian Agency for Development Cooperation
ODA	Official Development Assistance
PAAC	Provincial Arts Advisory Committee
PPP	Public-private partnership
SACOD	Southern Africa Communications for Development
SADC	Southern African Development Community
SEED	Small Enterprise Development
SMEs	Small and medium-sized enterprises
SWVSE	Structurally Weak, Vulnerable and Small Economy
TNC	Transnational corporation
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
VAC	Zambia National Visual Arts Council
VAT	Value added tax
WIPO	World Intellectual Property Organization
WTO	World Trade Organization
ZAFODAMUS	Zambia Folk Dance and Music Society
ZAM	Zambia Association of Musicians
ZAMCOPS	Zambia Music Copyright Protection Society
ZAP	Zambia Adjudicators' Panel
ZAPOTA	Zambia Popular Theatre Alliance
ZAWWA	Zambia Women Writers' Association
ZDA	Zambia Development Agency

# Strengthening the Creative Industries in Zambia

This report was prepared under the multi-agency project “Strengthening the creative industries in five ACP [African, Caribbean and Pacific] countries through employment and trade expansion”. This ACP pilot project is funded by the Ninth European Development Fund of the European Commission, as a component of the Support Programme to ACP Cultural Industries with the institutional support of the Secretariat of the African, Caribbean and Pacific Group and has been jointly implemented by ILO, UNCTAD and UNESCO, during the period 2008–2011. The idea of this project emerged during the First Meeting of the ACP Ministers of Culture held in Dakar in June 2003, and a project proposal was presented and endorsed at the Second Meeting of ACP Ministers of Culture held in Santo Domingo, Dominican Republic, in October, 2006.

This policy-oriented report addresses the objectives set out for the implementation of phase I of the project with a view to identify needs and priorities and recommend policies to foster employment, enhancing creative capacities, trade expansion and the linkages between culture and development. The purpose is to make an analytical assessment and a policy review of the current status of the creative industries in Zambia to identify key issues and formulate policy proposals for a strategic plan of action.

The ACP-EU Support Programme to cultural industries in ACP countries is funded by the European Commission, managed and monitored by the Secretariat of the African, Caribbean and Pacific Group of States (ACP). The Programme is open to the 79 African, Caribbean and Pacific (ACP) Group of States and the European Union Member States that are signatories to the 9th European Development Fund (EDF). It aims at reinforcing the capacities of policy and decision makers, cultural operators and certain domains of culture and cultural industries in the ACP countries, and it is structured around three complementary components: (i) the establishment of an ACP Cultural Observatory as a mechanism for providing technical advice and information in order to improve the policy, legal and institutional frameworks of the sector; (2) a multi-agency pilot project to strengthen the creative industries in 5 selected ACP countries (Fiji, Mozambique, Senegal, Trinidad and Tobago and Zambia), jointly implemented by ILO UNCTAD and UNESCO, and (3) a grant scheme seeking to reinforce the technical, financial and managerial capacities of ACP cultural operators and cultural industries.

The European Union remains the world’s leading donor for technical cooperation projects. In 2008, the year this project has started, the European Commission and its Member States collectively provided 60% of total development assistance for developing countries. For ACP countries a budget of 23 billion euros has been allocated under the 10<sup>th</sup> European Development Fund for the period 2008-2013, nearly the double of the amount allocated under the 9<sup>th</sup> EDF. Furthermore, the EU Commissioner for Development and Humanitarian Aid, in collaboration with the EU Commissioner for Education, Culture and Youth, in the context of the EU-ACP policy and economic relations, organized an important EU-ACP colloquium on the topic "Culture and Creativity, Vectors for Development" held in Brussels in April 2009. The event gathered about 800 participants from 65 African, Caribbean, Pacific and EU countries, including policymakers, development professionals, artists, creators and the civil society. The innovative aspect of the colloquium was that the "Brussels Declaration" was prepared by artists and cultural and development professionals setting three types of objectives at policy, economic and cultural levels. The growing importance of the creative industries to foster development was recognized by both the European and ACP partners.

## EXECUTIVE SUMMARY

This report was prepared with the purpose to make an assessment and a policy review of the current status of creative industries in Zambia with a view to identify key issues and formulate policy recommendations to assist the government to shape a strategic plan of action aiming at building a solid basis for enhancing its creative economy for employment, trade and development gains.

Part I of the study provides a general introduction to Zambia's economic, political and social environment. Throughout each of the chapters of the study, concrete action steps are proposed with the aim to promote and strengthen the creative industries in Zambia.

Part II describes the project context and the efforts undertaken at local level to develop the creative industries. The Government of Zambia is aware that the creative industries are a fast-growing economic sector that holds great potential for developing countries, which often have rich traditions of art, music, dance, literature, film, and other forms of creative assets, as well as a vast cultural heritage and traditional knowledge.

Part III, provides an overview of macroeconomic issues and cross-cutting factors that have an impact in the development of the creative industries. The institutional framework and the current organizational structure for the administration of cultural policy are examined. Particular attention is given to the vision presented at the Fifth National Development Plan as regards arts and culture, and to the objectives set by the Ministry of Community Development and Social Services, whose goal is to provide an enabling environment for safeguarding and promoting Zambian tangible and intangible heritage and to ensure the development and promotion of cultural industries. The chapter reviews the institutional mechanisms already in place to support the creative sector and gives an overview of the organization of the cultural sector in the country, identifying the main stakeholders, and needed actions. It also examines the current regulatory framework and relevant legislation. Issues related to employment conditions are pointed out since most artists and creative professionals are self-employed or work in the informal sector, thus, they do not benefit from the usual rights and obligations prescribed by the Industrial and Labour Relations Act. The report stresses the need of better awareness at country level about issues related to intellectual property rights, emphasizing that the international legislation on current copyright and related rights needs to address the concerns of developing countries, in the context of the proposals and deliberations being negotiated under the WIPO Development Agenda. In the same way, countries can stimulate their creative industries by providing special fiscal regimes as an incentive to artists and cultural producers. Investments and access to capital remains a key issue for unleashing the creative potential of developing countries. UNCTAD proposes the "creative nexus" model as a way to stimulate private investment, attracting new technologies, promoting entrepreneurship and setting the basis for a an export-led strategy for the creative industries. The report notes that the creative entrepreneurs are mostly micro and small enterprises often at the top of the supply chain at the creation stage.

Part III highlights that creative industries are among the most dynamic sectors of world trade. According to the Creative Economy Report 2010, world exports of creative goods and services are expanding fast and reached \$592 billion in 2008 with an annual growth rate of 14 per cent during the 2002-2008 period. South-South trade of creative goods amounted to nearly \$60 billion. Zambia's total trade on creative goods amounted to \$2.3 million in 2008; however no data is available for the creative services. Services are of critical importance for most economies in Africa. Therefore, two main sectors are briefly examined, the tourism and the audiovisual sectors, due to their close linkages with the local creative economy. Technology and connectivity, education and training as well as the linkages between the creative economy and the ecology are discussed as key components for a national strategy to reinforce entrepreneurial and creative capacities. Collection of reliable data for the creative industries remains imperative for a clear picture of the country situation and for policy formulation. On the basis of the UNCTAD Global database on creative economy, a country profile for Zambia was created to analyze the trade performance of the creative industries in the country.

Part IV, focus on a sector specific overview, describing the performance of pre-designated creative industries, including performing arts, music, audiovisuals, new media and the publishing sector. In the views of UNCTAD, in the short-medium terms, the creative sectors with better potential for development are: art crafts, visuals arts and design.

In Part V conclusions and policy actions are integrated into the analysis. A plan of action jointly prepared by UNCTAD/ILO/UNESCO and validated by the Government of Zambia is presented in Part VI of this study. Some policy actions proposed in this study are now reflected in the Sixth National Development Plan of Zambia presently under implementation.

In Part VII, to finalize, a comprehensive compilation of economic indicators brings evidence on the potential of the creative industries to foster inclusive and sustainable development. UNCTAD presents a country profile highlighting the trade performance of the Zambian creative industries, as a tool to formulate a strategy to enhance creative capacity and trade opportunities in the future.

## PART 1. GENERAL INTRODUCTION

This project is a contribution to the objectives set by the Dakar Declaration and Plan of Action for the Promotion of ACP Culture and Cultural Industries (2003) and by the Santo Domingo Resolution (2006), adopted by the ACP ministers of culture. Zambia was the first beneficiary country visited. This study is the UNCTAD contribution for the first phase of the project implemented in Zambia.

In the scope of the project, UNCTAD is focusing on the economic aspects of a development strategy, offering policy advice, technical assistance and capacity-building activities intended to enhance: (a) public policies; (b) supply capacities; and (c) trade and investment related to the creative industries. The work of the International Labour Organization (ILO) is oriented towards the social aspects, by promoting employment, decent work and entrepreneurship in the creative sectors. The United Nations Educational, Scientific and Cultural Organization (UNESCO) is setting standards in the cultural field, aiming at safeguarding cultural diversity, and enhancing linkages between culture and development.

Initially, various methodological questions were set out in the project document,<sup>2</sup> including the rationale for selecting the five countries and the target creative sectors. Three subsectors were designated as preferential for project activities, depending, of course, on the results of the policy analysis, the priorities, and the creative potential in each country. The initially designated sectors are: (a) performing arts,<sup>3</sup> (b) audiovisual and new media,<sup>4</sup> and (c) publishing and aspects of the “book chain.”<sup>5</sup> Within the broader context of these subsectors, a tailor-made selection will be made depending on the specificity of each pilot country.

The analysis in this report is the result of research based on primary and secondary material. The research process included one fact-finding mission, and extensive collaboration with local stakeholders, including government officials, professionals from the all creative industries, and civil society. Feedback on the main findings of this analysis was provided by the Government and by stakeholders, including discussions about the priorities for a national policy agenda to enhance the creative economy.

**Figure 1. UNCTAD High-Level Policy Dialogue on Creative Industries  
July 2008, Lusaka, Zambia**



Chair person: Vice-Minister of Community Development and Social Services

<sup>2</sup> ACP secretariat, ILO, UNCTAD and UNESCO. Summary Joint Programme Document for Strengthening the Creative Industries in five selected African, Caribbean and Pacific Countries through Employment and Trade Expansion. Geneva. February 2007.

<sup>3</sup> Performing arts refers to: music recordings, musical instruments, musical compositions and publications etc.; festivals, concerts, plays and artistic performances, dance, songs, other performing arts; performing arts venues; music and performing arts production, dissemination, operation and promotion services.

<sup>4</sup> Audiovisual and new media refers to: film, video recording, radio and television programmes, Internet creativity sites etc.

<sup>5</sup> Publishing and other elements of the “book chain” refers to: bookshops, libraries, initiatives to support the development of reading (such as public readings).



As part of the methodology, UNCTAD organized the High-Level Policy Dialogue on Creative Industries in Zambia, which was held from 2 to 4 July 2009 in Lusaka.<sup>6</sup> The purpose was to submit the final draft of this policy-oriented study for discussion and validation by the Government and stakeholders. In order to prepare for the session, UNCTAD worked in close collaboration with the Director of the Department of Cultural Affairs from the Ministry of Community Development and Social Services. The session was opened by the United Nations Resident Coordinator in Zambia. The Deputy Minister chaired the debates and stressed the commitment of his Government to ensuring an effective implementation of the project and to provide full support for UNCTAD's activities.

UNCTAD made a comprehensive presentation of the study, identifying key issues and proposing a number of policy actions. The session was fruitful, as evidenced by the lively debates and the large number of participants from all segments of the creative industries. On behalf of the Zambian Government, the Permanent Secretary of the Ministry of Community Development signed a document endorsing the study and approving the plan of action.

The policy dialogue was followed by the official signing and validation statements by high-level officials from seven line ministries, who agreed to form the Creative Economy Inter-Ministerial Committee, as proposed in chapter 1.<sup>7</sup> The study was praised by the officials, who congratulated UNCTAD on its well-researched study and its pragmatic proposals. The stakeholders and professionals from the creative industries, artists, and relevant institutions voiced their hope for concrete results. UNCTAD thanked the Zambian Government for its strong engagement, and agreed to include the comments received into this final version.

**Figure 2. Signing of the study validation**



Permanent Secretary, Ministry of Community Development and Social Services, Director of Cultural Affairs, and Chief of the Creative Economy Programme, UNCTAD

## 1.1 COUNTRY INFORMATION

Zambia is a landlocked country with an estimated population of approximately 12.5 million.<sup>8</sup> The country has 73 ethnic groups, with a small percentage of European, Asian and other immigrant communities. There are seven national languages: Bemba, Kaonde, Lozi, Lunda, Luvale, Nyanja and Tonga. The official language is English. The majority of the population originates from Bantu-speaking groups.<sup>9</sup> The country is administratively divided into nine provinces: Central, Copperbelt, Eastern, Luapula, Lusaka, Northern, North-Western, Southern and Western. The country has vast

<sup>6</sup> See: UNCTAD Creative Programme e-newsletter no. 10. Geneva. September 2009.

<sup>7</sup> For more details, see section 3.1: Institutional framework around the creative economy.

<sup>8</sup> Projected mid-year population 2000–2008. CSO Populations Projection Report. <http://www.zamstats.gov.zm>

<sup>9</sup> Republic of Zambia (2008). Ministry of Community Development and Social Services. National cultural policy (draft). June: 9.

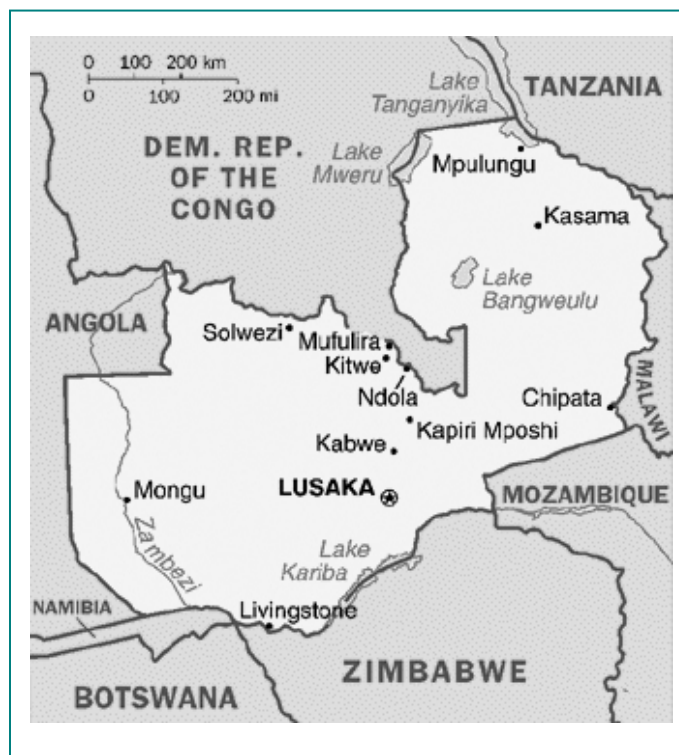
mineral resources including copper, cobalt, zinc, lead, coal, gold, silver and various gemstones. In addition, the country has hydroelectric power and good agricultural potential.

According to the United Nations, Zambia is among the world's 49 least developed countries (LDCs), based on the three criteria of low income, human resource weakness and economic vulnerability.<sup>10</sup> About 36 per cent of Zambia's total population is considered non-poor, while the remaining 64 per cent of the population are categorized as living under either extreme or moderate poverty.<sup>11</sup> As a landlocked country, Zambia shares borders with eight countries. The capital is Lusaka. Zambia is one of Africa's most urbanized countries; approximately 30 per cent of the population lives in urban areas. The rate of illiteracy is about 27 per cent. The dropout rate at schools is very high.<sup>12</sup> Zambia is nonetheless known for the political and social stability that prevails in the country.

## 1.2 POLITICAL STRUCTURE

Zambia gained independence in 1964 and Kenneth Kaunda became the first president. The country was ruled as a one-party State until general elections were held in October 1991. Since then, Zambia has been a multi-party parliamentary democracy. Its legislature is the National Assembly of Zambia, which has a total of 160 members.<sup>13</sup> Zambia has universal adult suffrage. The constitution calls for separation of powers between the executive, the legislature and the judiciary. The president is elected for a term of five years by direct vote. In 2008, Rupiah Banda was elected the fourth president of the country.

Figure 3. Country Map



<sup>10</sup> See the annual issues of the *Least Developed Countries Report* published by UNCTAD.

<sup>11</sup> Socio-demographic data. <http://www.zamstats.gov.zm>

<sup>12</sup> <http://www.zambiatourism.com>

<sup>13</sup> [http://www.parliament.gov.zm/index.php?option=com\\_content&task=view&id=74&Itemid=45](http://www.parliament.gov.zm/index.php?option=com_content&task=view&id=74&Itemid=45)

### 1.3 ECONOMIC BACKGROUND

Once a middle-income country, Zambia faced a long degradation of economic conditions in the 1970's, with a decline in gross domestic product (GDP) per capita between the 1960's and the 1990s, driven by a decline in copper prices on the world market and decrease in domestic production. In 2009, the resource-endowed country ranked 164<sup>th</sup> out of 182 countries on the Human Development Index and a large percentage of the population lives below the poverty line. Zambia was granted LDC status in 1991. Zambia's economy started growing in the late 1990s, thanks to the economic and public-sector reforms initiated in 1991. Key milestones included privatization of the mining sector, promotion of the private sector, infrastructures development, and fiscal management and debt reduction initiatives in the mid-2000s<sup>14</sup>.

#### Economic and social indicators

Economic and social indicators	2008
Population (millions)	12.6
Gross national income per capita (\$, current prices)	1,053
Poverty (% of population below national poverty line)	68
Urban population (% of total population)	35
Life expectancy at birth (years)	45
Literacy (% of population age 15+)	71
Agriculture (% of GDP)	21.2
Industry (% of GDP)	46.3
Manufacturing (% of GDP)	11.6
Copper products export (% of total exports)	64.3

Sources: World Bank, Comtrade, TAC

About 65 per cent of Zambia's export earnings come from mining – mainly copper and cobalt. Other exported commodities are sugar, cereals and tobacco. The main imports are machinery and petroleum.<sup>15</sup> Zambia's main trading partners are European countries, in particular Germany and the United Kingdom, and also Japan, India, Saudi Arabia, Egypt and Thailand. Its main trading partners in Africa are South Africa, Malawi, Zimbabwe, the United Republic of Tanzania, and the Democratic Republic of the Congo.<sup>16</sup>

Zambia economic growth has shown some resilience to the global crisis (+6.3 per cent for real GDP in 2009), thanks to the increase in copper production and a salient agricultural production. In parallel, while decreasing international food and commodities prices had an adverse impact on revenue collections, domestic prices' dynamics eased significantly and the current account deficit narrowed. The Zambian Kwacha depreciated by more than 80 per cent after the burst of global financial turmoil in 2008-2009, in parallel, the banking system was subject to the global restriction on access to foreign capital. The Special Drawing Rights allocation by the International Monetary Fund (IMF) in September 2009 has boosted international reserves and the banking sector's confidence; the exchange rate has thus recently strengthened and stabilized, supported by the recovery in copper prices.

<sup>14</sup> UNCTAD Trade and Development Board, Geneva, 6-8 September 2010. In-depth evaluation of UNCTAD's Technical cooperation activities dedicated to least developed countries, landlocked developing countries, small island developing States and other structurally weak, vulnerable and small economies- Case study on Zambia. TD/B/WP/224

<sup>15</sup> Zambia exports for the period 2005–2007 and Zambia imports for the period 2005–2007. <http://www.zamstats.gov.zm>

<sup>16</sup> SADC. *The Official SADC Trade, Industry and Investment Review 2007/2008*. Zambia: 265.

Zambia was officially included in the list of LDCs in 1991<sup>17</sup>. The LDC status currently provides special support measures which differ among the various development partners, but they primarily relate to trade preference (for example, Zambia is a beneficiary of the Generalized System of Preferences) and official development assistance, including development financing and technical cooperation. In addition, LDCs receive support under the Enhanced Integrated Framework (EIF) to develop the necessary capacities in the area of trade, including improving upon their supply response to trade opportunities and better integrating into the multilateral trading system.

The 2009, UNCTAD's *Least Developed Countries Report* indicated that Zambia belongs to different groups of countries: mineral exporters in export specialization, net food exporters and net exporter of agricultural raw material in net agricultural trade. In addition, with distances from the nearest seacoast of more than 2,000 km and surrounded by eight neighboring countries, Zambia is classified as an LLDC<sup>18</sup>. Zambia also belongs to the unofficial category of SWVSEs<sup>19</sup>, based on smallness and vulnerability factors.

Dedicated programmes of actions have to be implemented, in Zambia in particular, to reduce transportation constraints and poverty resulting from their remoteness and isolation from world markets. Transit time for goods from or to Zambia is extremely long because of substantial distance and often inefficient transit transport conditions in the country and the surrounding transit developing countries. The distance is highly correlated with transport costs (the Zambian Ministry of Commerce, Trade and Industry estimates that 70 per cent of the cost, insurance and freight price of internationally traded goods in or from Zambia is related to transport cost), so Zambian competitiveness on the world market is eroded. As dominant exports are commodities and as such exports are transit-intensive, higher payments of transport and insurance services imply an equivalent reduction in export earnings. Higher transport costs borne by Zambia can be considered as a major restrictive barrier to trade, thus lowering Zambia integration in the multilateral trading system.

Recent FDI inflows have contributed modestly to the much-needed diversification of the economic base and exports. There is some evidence indicating that FDI has contributed to skills and technology transfer. Zambia can achieve its potential, but needs to work hard on bringing its investment policy framework, its macroeconomic policies, its infrastructure and the costs of doing business to levels that make the country's producers and creators more competitive regionally and globally.

Tourism represents a major potential growth industry for Zambia. The country has vast wilderness areas, and if properly used, they could help attract considerable amounts of FDI. Tourism contributed 3.4 per cent to the GDP of the region and was directly responsible for 1.75 million jobs in 2006<sup>20</sup>. The creative industries have a close link with the tourism industry. The creative industries are a sector with growing economic potential (see chapter 3), with art crafts, performing arts, and the publishing and design industries standing out as the sectors with the best prospects of contributing to employment, exports and GDP. In addition, the creative industries can have a positive impact on enhancing gender equality, as they offer numerous possibilities to women to be active in the creative sectors. They also contribute to social inclusion because of their attractiveness to young people, including those from rural communities.

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<sup>17</sup> General Assembly resolution A/RES/46/206 adopted at its forty-sixth session

<sup>18</sup> Landlocked developing country

<sup>19</sup> Structurally weak, vulnerable and small economy

<sup>20</sup> Ibid.

## PART 2. PROJECT CONTEXT

### 2.1 THE PROJECT BACKGROUND

This project to enhance the economic potential of the creative industries in five Africa, Caribbean and Pacific countries embodies a new approach to this fast-growing sector, and has been designed and agreed upon between three United Nations agencies, the ACP Group of States and the European Commission. By nurturing and building upon cultural assets already existing in a set of countries, the project is intended to develop the music, film, performing arts, publishing and other related creative industries, through a variety of targeted activities spread over four years. It is intended to respond to needs expressed by ACP countries, by offering effective policy guidance and developing capacity-building materials to assist transform local talent into a catalyst for dynamic creative industries that can foster sustainable employment, encourage economic growth and enhance trade capacity. Project activities will aim at providing support to policy-makers responsible for promoting the creative economy, creative industries workers, agents/managers and practicing artist-entrepreneurs. The project will be centered on local people's needs and expectations, with a view to preserving its traditions and encouraging its creativity and thereby contributing to the promotion of cultural diversity while fostering an inclusive and sustainable development.

Creative industries comprise the creation, production, marketing and distribution of products and services resulting from human creativity. According to UNCTAD, the creative industries deal with the interplay of various knowledge-based economic activities comprising tangible products and intangible intellectual assets, with economic and culture value, creative content and market objectives. They include the performing arts, the motion picture and recording industries, book, journal and newspaper publishing; and the computer software and games industry, music and theatre production, photography, commercial art, advertising, radio, television and cable broadcasting industry. The prominent role of creativity in shaping the direction and volume of trade flows has important implications for both development and socio-economic growth, especially in developing countries. In developed countries, the creative economy is becoming a platform for promoting innovation, enhancing services and reducing unemployment. The strengths of this creative economy rely on its capacity to improve competitiveness and to help countries to diversify their economies. While the range of skills and specific cultural features of a country are preconditions for successful expansion of the creative economy, creativity is becoming crucial to articulate development strategies. Creativity is a strategic asset that can offer a comparative advantage in the globalizing world and help maintain a country's cultural identity.

In many developing countries, the performance and competitiveness of the creative industries have suffered from weak institutional and political support, low levels of entrepreneurial capability, low added value, over-dependence on foreign firms and massive copyright infringement. Earnings, working conditions and employment could be enhanced if the industries were more effectively organized: if capacities for cultural entrepreneurship were strengthened and if new market opportunities were identified and exploited more fully. Challenges posed by globalization can be dealt with expanding the economic and trade potential of local talents, through cultural traditions and expertise. Understanding and responding to the influences shaping the creative industries is a precondition for defining effective intervention strategies<sup>21</sup>.

Noteworthy policies and project activities have been undertaken in support of the creative industries in some developing countries, but few could be identified as models for systematic and strategic support to build and strengthen their competitiveness. The potential for boosting sustainable socio-economic

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<sup>21</sup> Strengthening the Creative Industries in five selected African, Caribbean and Pacific countries, project document, Annex 1, description of action.



growth and employment through the creative industries in developing countries remains mostly untapped. Although creative industries currently contribute significantly to employment, this is often a precarious source of income, characterized by unstable work contracts, poor working conditions and lack of social protection.

Creative industries could promote new ways of integration with the global economy, through regional cooperation. They could thus become a more important economic sector recognized for its substantial contribution to GDP. With appropriate strategic policy support at both national and international levels and strengthening of the capacities of creative industry practitioners and entrepreneurs, the creative economy represents new opportunities for developing countries to create new products, open up access to global markets and leap-frog into new areas of wealth creation.<sup>22</sup>

Creative industries have impressive growth and economic performance in many countries in comparison to other more traditional sectors. The complex global value chain of creative industries offers many opportunities for developing countries to link up with international productions networks. Special attention should be paid to ways of increasing the participation of developing countries in international trade. Each country needs to choose its own "model", based on its realities and specificities, because there are no "one size fits all" models of development for creative industries suitable to all countries.

This project is building on ongoing work of the three implementing agencies. In the case of UNCTAD, the project takes into account the progress made in the intergovernmental debate in the area of the creative industries and the emerging creative economy. Particularly, in the context of mandates from UNCTAD XI (2004) and UNCTAD XII (2008), UNCTAD has been playing a key role in sensitizing governments about the potential of the creative economy to foster trade and development gains, promoting policy initiatives and enhancing cooperation with countries, institutions and the international community. UNESCO has been promoting the implementation of the Convention on the Protection and Promotion of the Diversity of Cultural Expressions as well as its Global Alliance for Cultural Diversity that creates synergies among public, private and not-for-profit sectors. The project also links up with related work in the area of culture, promoting demand for cultural goods, sustaining local initiatives and businesses, encouraging investment by the state or local structures and engaging other partners from the culture sector, especially those involved in publishing, recording and live performance.

In most advanced countries, the creative industries have already become a strategic priority. For example, some governments have carried out analysis and mapping exercises, and consciously defined and planned national policies for each sector. Unfortunately, this is not happening in most developing countries, where the lack of attention given to producers of cultural goods and services translates into weak support in specific accompanying measures (legislation and regulation, institutional support, access to credit and funding, etc.). In this environment, policy guidelines can assist in supporting the creative industries to develop and flourish. Governments can play a key role in the design of the policy framework for enhancing their creative economy.

The economic importance of culture in the development of ACP countries was clearly stressed in the Cotonou Agreement, in particular in Article 27<sup>23</sup>. The Agreement urges ACP governments to undertake action aimed at promoting and implementing ACP cultural projects and programmes. It highlights the importance of culture in terms of identity, cultural dialogue and cultural industries. The Nadi Declaration of Heads of State of ACP countries (July 2002) underscored the contribution of culture to the economic and democratic development of ACP countries. The First Conference of ACP Ministers of Culture in Dakar, June 2003 clearly acknowledged the importance of cultural industries in

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<sup>22</sup> UNCTAD, "Creative industries and development"(Eleventh Session, Sao Paulo, 13-18 June, 2004). TD(XI/BP/13 4 June 2004, p.7.

<sup>23</sup> European Commission DG-Development - Cotonou Agreement.  
[http://europa.eu.int/comm./development/body/cotonou/agreement\\_en.html](http://europa.eu.int/comm./development/body/cotonou/agreement_en.html)

development processes in the Dakar Declaration on the Promotion of ACP Cultures and Cultural Industries and its Plan of Action. The ACP Ministers of Culture recognized "the potential of enterprises involved in culture and their contribution to sustainable economic development and the fight against poverty". The Dakar Plan of Action identifies, among others, as objectives: the development or the creation of several mechanisms to improve the ACP cultural institutions (capacity-building); the development of human capital (artists, designers, managers, etc.), the development of cultural products, businesses and industries, and, the development of ACP cultural markets for better integration in global markets.

The transition from cultural to creative industries is not a straightforward or automatic process and requires nurturing and specific policy initiatives. The First Conference of ACP Ministers of Culture in Dakar recognized the specific role that ILO, UNCTAD and UNESCO can play in this field and this was endorsed by the Declaration on the Promotion of ACP Cultures and Cultural Industries. The ACP group confirmed their commitment "to work with the private sector and specialized agencies, such as the International Labour Organization (ILO), to promote the creation and development of Small and Medium Enterprises (SMEs) and entrepreneurship in the cultural sector" (Clause 58). The Declaration also recognized "the work by UNCTAD on the development potential of cultural industries and requests UNCTAD and other relevant international organizations to carry out studies in evaluating the impact of the current trade regime on domestic cultural policies" (Clause 58). It also supports "facilitating partnerships between the public sector, private sector and civil society, in particular within the framework of UNESCO'S Global Alliance for Cultural Diversity" (Clause 54).

Furthermore, within the framework of Regional Strategy Papers<sup>24</sup> between the ACP region and the European Community, complementary actions to regional economic integration and trade are to be considered. The cultural sector is of growing significance throughout the region and can be used as a unifying factor to cement regional ties. The development of creative industries can be part of the ACP-EU policy agenda with its potential impact on integration processes, intra-ACP and international trade, institutional capacity building, regional cooperation and integration, conflict prevention and dialogue between nations.

## 2.2 THE MILLENIUM DEVELOPMENT GOALS (MDGS)

This policy-oriented study was also carried out in the context of the Millennium Development Goals (MDGs) since they represent the international policy environment within which national strategies for advancing the creative economy in developing countries are being implemented. The MDGs express the international community's commitment to the global development agenda. There are eight goals with specific targets to be reached by 2015 namely to: (1) eradicate extreme poverty and hunger; (2) achieve universal primary education; (3) promote gender equality and empower women; (4) reduce child mortality; (5) improve maternal health; (6) combat HIV/AIDS, malaria and other diseases; (7) ensure environmental sustainability; and (8) develop a global partnership for development. The MDGs address development challenges as an inherent part of the global economy and the life of societies.

The creative industries sectors of the developing economies have significant potential to contribute towards the achievement of 5 out of the 8 MDGs. The creative economy has a multitude of dimensions and it contributes to economic, social, cultural and sustainable development in a number of ways. From the economic perspective; it promotes economic diversification, revenues, trade and innovation. According to UNCTAD, world trade in creative industries products continues to increase; trade in creative goods and services grew on average 14 per cent annually during the period 2002-2008. A

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<sup>24</sup> Regional Strategy Papers and Regional Indicative Programmes for 2002-2007 for: 1. Southern African Development Community/European Community; 2. West Africa/European Community; 3. Region of Eastern and Southern Africa and the Indian Ocean/European Community; 4. Central African Region /European Community; 5. Pacific ACP/European Community; 6. Caribbean Forum of the ACP States/European Community.



major social impact of the creative industries is their contribution to employment, particularly for women and the youth. Another important social aspect of the creative industries relates to their role in fostering social inclusion. At the grass-root level, the creative economy includes cultural activities that can be important in linking social groups in communities and contributing to social cohesion. Finally, the manifestations of a people's culture - customs, rituals, artifacts, music and so on - permeate the daily lives of men, women and children and constitute a significant element in providing for their education, culture, happiness and well-being<sup>25</sup>.

### 2.3 SUSTAINABLE DEVELOPMENT AND THE GREEN ECONOMY

The creative industries also contribute to sustainable development. It is becoming increasingly recognized that the concept of "sustainability" has a larger scope beyond its application to the environment. The tangible and intangible cultural capital of a community, a nation or a region of the world is something that must be preserved for future generations just as natural resources and ecosystems need to be safeguarded to ensure continuation of human life on the planet.

Cultural sustainability implies a development process that maintains all types of cultural assets, from minority languages and traditional rituals to artworks, artifacts and heritage buildings and sites. The contributions that artistic and cultural production, dissemination and participation make to economic empowerment, cultural enrichment and social cohesion in the community, in order to promote major social progress, are the main reasons to support the principles of cultural sustainable development.

Creative industries built on cultural capital and heritage often have deep roots in the natural environment. The traditional knowledge that makes the creative industries so unique evolved over centuries through observation and use of the natural environment. From the study and use of plants came our first systems of medicine and the basis of the natural health and cosmetics industry. Indigenous knowledge of the natural environment has created lucrative markets for visual arts, eco-fashion and ecotourism.

The primary input for creative activities is creativity, a natural resource in abundance in the world. The creative industries production is usually less dependent on heavy industrial infrastructure and can be easily compatible with environmental protection and preservation. There is a recent trend towards ethical consumerism. Both producers and consumers of creative products increasingly question the true cultural, economic and environmental value of what they create, buy and sell. In this spirit, creativity and biodiversity are well matched and should be seen as a win-win solution to promote responsible use of the world's biodiversity, while promoting the development dimension of the creative economy<sup>26</sup>.

### 2.4 ZAMBIA'S SIXTH NATIONAL DEVELOPMENT PLAN 2011-2015

The Zambia Government has approved in January 2011, its Sixth National Development Plan 2011-2015 whose theme is "Sustained Economic Growth and Poverty Reduction". Tourism and its linkages with arts and culture through the creative industries is one of the priority sectors for development and potentially a major contributor to advance socio-economic development in Zambia. The new National Development Plan foresees Zambia as a major tourism destination with unique features, a thriving

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<sup>25</sup> Creative Economy Report 2010: A feasible development option. UNCTAD/UNDP, 2010. For further information on the MDGs please refer to page 33. <http://www.unctad.org/creative-programme>

<sup>26</sup> Creative Economy Report 2010: a feasible development option. UNCTAD/UNDP, 2010. See also UNCTAD Creative Economy E-News No.12, April, 2010.

national cultural heritage and creative industries which contribute to sustainable economic growth and poverty reduction by 2030<sup>27</sup>.

Arts and culture will also focus on the provision of requisite infrastructure and skills for the promotion of the creative industries and for the preservation of cultural heritage, promotion of creative industries, integrating climate change concerns in the development of the tourism industry and the preservation of and promotion of Zambia's cultural heritage practices and expressions for posterity<sup>28</sup>.

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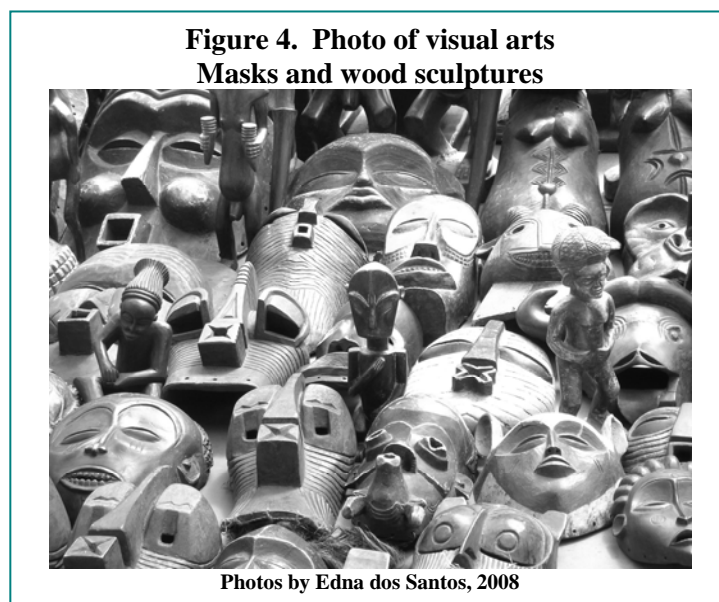
<sup>27</sup> The Sixth National Development Plan 2011-2015- Sustained Economic Growth and Poverty Reduction in Zambia. Executive Summary, Ministry of Finance and National Planning, Lusaka, January 2011.

<sup>28</sup> Zambia Media News Summary, 8 February 2011, Daily Mail, SNDP to boost tourism sector, distributed by UNDP office in Lusaka.

## PART 3. CREATIVE INDUSTRIES POLICY REVIEW

This section looks at macroeconomic issues and cross-cutting factors that have an impact on the development of the creative industries at national level and policy formulation at international level. Throughout this report, recommendations are made in each subsection for possible policy interventions that could be taken for strengthening the creative industries for development gains.

Now-a-days it is widely recognized that in our globalized world, it is important to understand the interface between creativity, economics, culture and technology, for an appropriate design and articulation of the development strategies for the twenty-first century. Moreover, in a world increasingly dominated by images, sounds, texts and symbols, the so-called creative economy is leading growth, employment, innovation and social cohesion in many advanced countries. Therefore, the creative economy can also be a feasible development option to diversify the economies of developing countries, if effective public policies are in place. At the heart of the creative economy are the creative industries.<sup>29</sup>



The creative industries are a fast-growing economic sector that holds great potential for developing countries, which often have rich traditions of art, music, dance, literature, film, and other forms of creative talent, as well as vast cultural heritage and profound traditional knowledge. As per UNCTAD, throughout this decade the creative industries became one of the most dynamic sectors in the world economy and in international trade. However, the large majority of developing countries are not yet able to harness the potential of their creative economies to create jobs, revenues and export earnings.<sup>30</sup> The *Creative Economy Report 2008*, provides empirical evidence that the creative industries had an average growth rate of 8.7 per cent during the period 2000–2005. More recently, worldwide trade in creative goods and services reached \$592 billion in 2008.<sup>31</sup> Africa, however, it is not yet benefiting from its creative economy to accelerate development.

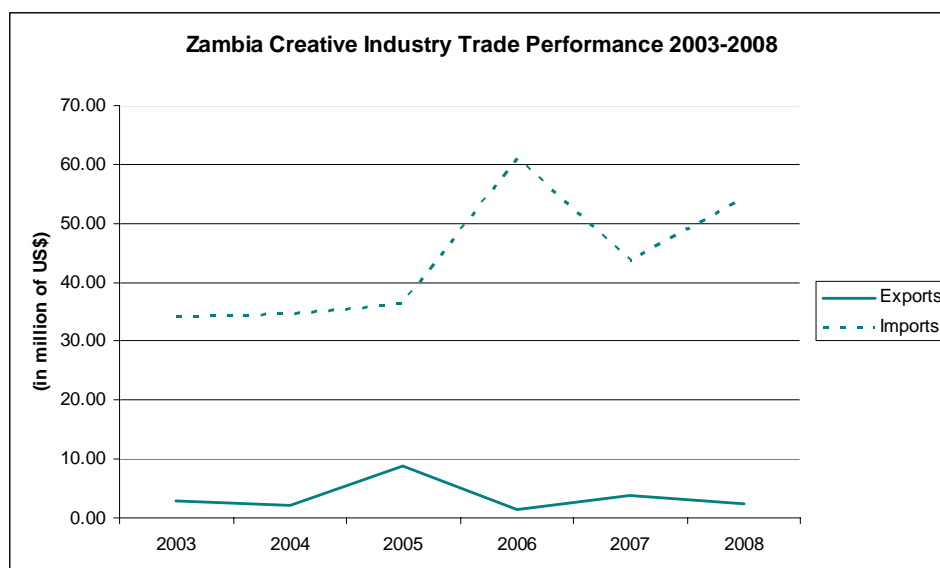
<sup>29</sup> UNCTAD (2006). Creative economy: a feasible development option. Article by E. dos Santos.

<sup>30</sup> UNCTAD (2008). Secretary-General's high-level panel on the creative economy and industries for development. Background paper. TD(XII)BP/4. January.

<sup>31</sup> UNCTAD and UNDP (2010). *Creative Economy Report 2010. The Creative Economy, A feasible development option*. UNCTAD/DITC/TAB/2010/3. New York and Geneva.

For the moment, despite the abundance of talents, the creative industries in Africa are relatively small and very fragmented. According to available official statistics, Zambia's exports of creative goods totaled \$2.3 million in 2008. The trade aspect of the creative industries will be further elaborated in subsequent sections.

**Chart 1. Zambia Creative Industry Trade Performance, 2003-2008**



Source: UNCTAD Database on Creative Economy

### 3.1 INSTITUTIONAL FRAMEWORK AROUND THE CREATIVE ECONOMY

Zambia's first president established the Department of Cultural Services and gave it the mandate of managing and coordinating official cultural activities. Over the years, the Department has been shifted from one ministry to another. There is no specific ministry of culture within the current government structure. Currently, there is the Department of Cultural Affairs (DCA) housed within the Ministry of Community Development and Social Services (MCDSS), which has responsibilities in the cultural sectors.

The objective of the MCDSS is to contribute to the socio-economic recovery programme and to improve the welfare of the Zambian people. It is mandated to contribute to the reduction of poverty, to improve the standard of living of the most vulnerable members of society, to protect children, and to preserve, develop and promote Zambia's cultural heritage and identity. With respect to culture, the MCDSS oversees the National Arts Council (NAC) and is responsible for the national cultural policy, promoting folk culture, and supporting the arts and the cultural industry programme.<sup>32</sup> In its strategic plan, the MCDSS states its objective of furthering policy for the effective participation of the private sector, non-governmental organizations (NGOs) and community-based organizations with respect to folklore and culture.

The DCA has a strong focus on intangible heritage, in particular dance and music and other aspects of folk culture such as art crafts. It is also directly responsible for the development of the national cultural policy. The DCA participated in the creation of the Copyright Society, which is under the Ministry of Information and Broadcasting Services. Responsibilities for the performing and visual arts were transferred from the DCA to the National Arts Council when it became operational. The DCA is active

<sup>32</sup> Republic of Zambia (2007). Ministry of Community Development and Social Services. *Strategic Plan for the Ministry of Community Development and Social Services 2007–2011, September*.

in capacity-building among community theatre groups and cultural organizations, and it is involved in the training of district cultural officers. It is also active in developing cultural and art crafts villages throughout Zambia, as well as theatres and art galleries. The DCA is active in promoting and documenting traditional ceremonies, and providing cultural news and literature including an anthology of Zambian poetry. The DCA also organizes entertainment during state and public functions.

The role of the DCA is to improve the quality and standards of cultural production, to safeguard cultural heritage, and to promote the integration of culture into the mainstream of development.<sup>33</sup>

**Figure 5. Photo of visual arts- a typical creative product from Zambia**



Photo by Edna dos Santos

Administration of the culture sector also cuts across various other ministries, including the Ministry of Information and Broadcasting Services, which oversees the Zambia Music Copyright Protection Society and the film and cinema administration; the Ministry of Tourism, Environment and Natural Resources, which oversees the National Museum Board and the National Heritage Conservation Commission; the Ministry of Local Government and Housing, which oversees Chiefs' Affairs; the Ministry of Science, Technology and Vocational Training, which oversees the training of artists in colleges; the Ministry of Home Affairs, which oversees the National Archives; the Ministry of Education, which oversees book policy; and the Ministry of Commerce, which deals with intellectual property.

**Action:** The current organizational structure for the administration of cultural policy – and its impact on creative sectors – appears, to a certain extent, to be fragmented, making the design of more concerted strategic policies difficult for the short and long term. It could be useful to reinforce one single entity that would encompass the multiple aspects related to culture and the creative sectors, for example, through the establishment of an empowered ministerial body devoted to culture and the creative economy. In the short term, the establishment of an inter-ministerial committee for the creative economy could be considered, or a Zambian creative economy agency, as a centralized coordinating body and institutional mechanism to facilitate policy formulation and to play a key role in shaping inter-ministerial decisions. This would involve government officials from all the relevant ministries and institutions, as well as key stakeholders from professional associations in the creative sector, to develop and put in place appropriate and more effective strategies to enhance the creative industries as a strategic component of Zambia's economic development policy agenda. The implementation of this action is likely to reinforce the current institutional mechanism and facilitate more effective policy actions.

<sup>33</sup> Ibid.

In its strategic plan, the MCDSS has included two objectives which are of particular relevance for developing the creative industries:

*Objective 3:* To develop and promote viable creative/cultural industries for sustainable development.

*Strategies:* To develop and implement a programme to conduct periodic surveys on creative/cultural industries; to develop and implement a programme to promote viable creative/cultural industries; and to promote the establishment of cooperatives among cultural associations and industry.

*Performance indicators:* Number of viable creative/cultural industries identified annually; number of creative/cultural industries promoted annually; number of jobs created in the creative/cultural industries; percentage increase in the contribution by creative/cultural industries to GDP.<sup>34</sup>

*Objective 4:* To preserve, protect and promote folklore and intangible heritage for cultural enrichment and national identity.

*Strategies:* To facilitate and develop a comprehensive legal framework on folklore and intangible heritage; to enforce the legal framework on folklore and intangible heritage in collaboration with law enforcement agencies and stakeholders; to collaborate with international communities on the legislation and enforcement of folklore and intangible heritage enacted; to develop and implement a programme for collecting, documenting and disseminating folklore and intangible heritage to the public for increased awareness; to develop and disseminate catalogues and calendars on local, regional and international fairs and exhibitions.

*Performance indicators:* Inventory of folklore and intangible heritage likely to be established and maintained annually; legal framework for the protection of folklore and intangible heritage expected to be in place by 2010; reduction in the incidence of theft and piracy of folklore and intangible heritage; number of traditional, cultural ceremonies promoted and provided annually; number of Zambian artists participating in private and public, state/national functions annually; number of international fairs participated in annually by local artists and creative/cultural groups.<sup>35</sup>

**Action:** *Objective 3* is particularly crucial for strengthening creative industries. Concrete steps to effectively implement this objective should be put in place as soon as possible, if the required human and financial resources are available. As regards *Objective 4*, encouraging links between entrepreneurial development and folklore and heritage-related activities would be useful.

Along with the Department of Cultural Affairs, the National Arts Council is a crucial institution in the Zambian cultural scene. The National Arts Council of Zambia is a statutory body established under Act no. 31 of 1994 of the Laws of Zambia. It became operational in 1996. Its overall objective is to advise the Government on policy towards visual, performing, media and literary arts in the country. Its aim is also to encourage artistic excellence on both amateur and professional levels in the country and to promote the arts as an integral part of the lives of people in Zambia.<sup>36</sup>

The National Arts Council comprises nine arts associations representing performing, literary, media and fine arts: the National Theatre Arts Association of Zambia (NATAAZ); the National Media Arts Association (NAMA); the Zambia Folk Dance and Music Society (ZAFODAMUS); the Zambia Women Writers' Association (ZAWWA); the Zambia Popular Theatre Alliance (ZAPOTA); the Zambia Association of Musicians (ZAM); the Zambia Adjudicators' Panel (ZAP); the Zambia National Visual Arts Council (VAC); the Association of Theatre for Children and Young People in Zambia (ASSITEJ).

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<sup>34</sup> Ibid.

<sup>35</sup> Ibid.

<sup>36</sup> <http://www.nationalartscouncil.org.zm>



The functions of the NAC are to provide policy input at the national level with respect to all forms of cultural expression in the country. The NAC also develops, promotes, regulates and encourages all forms of amateur and professional arts on a national basis in conjunction with the associations and the Government. It assists the formation of associations or organizations, encourages them to register as national arts associations, and encourages their affiliation to the appropriate international organizations. The National Arts Council also assists, financially or otherwise, any group or individual representing Zambia in any artistic activity within or outside Zambia. It issues arts permits. It also assists Zambians in obtaining relevant training within or outside Zambia. It ensures that arts groups at all levels maintain proper accounts, and if necessary, it supervises the accounts. It regulates and provides modalities for the award of national honors for artistic merit. The NAC regulates and monitors all national arts programmes presented in Zambia, and it promotes the development and organization of the arts.

The National Arts Council is comprised of the leaders of the associations that are affiliated with the NAC. Two members of the MCDSS are also on the NAC council, as well as the director of the DCA, and one member each appointed from the Ministry of Education, the Ministry of Information and Broadcasting Services, the Ministry of Science, Technology and Vocational Training, and the Ministry of Tourism. The Ministry of Commerce was recently asked to appoint a member to be part of the NAC Council.<sup>37</sup>

In order to move forward, the NAC has established eight goals, each of which is accompanied by one or more strategic objectives:

*Goal 1:* Ensure the sustainability of NAC operations.

*Strategic objectives:* Increase sources of funding; secure increased funding from government.

*Goal 2:* Build the institutional capacity of the NAC.

*Strategic objective:* Provide space for operations related to the arts.

*Goal 3:* Improve the management capacity of the NAC.

*Strategic objectives:* Provide communication; build the information management capacity of the NAC; decentralize the operations of the NAC; improve NAC staff efficiency; strengthen the institutional capacity of the affiliates.

*Goal 4:* Promote gender awareness and commitment in the arts.

*Strategic objective:* Mainstream gender in all arts programmes.

*Goal 5:* Ensure legislation and legislative procedures to support the objectives of the NAC.

*Strategic objective:* Periodically review the NAC Act.

*Goal 6:* Promote the commitment to fight HIV/AIDS.

*Strategic objective:* Mainstream HIV/AIDS issues in all arts programmes.

*Goal 7:* Promote lifelong learning and education in the arts.

*Strategic objective:* Lobby for the establishment of arts education in schools and tertiary education curricula.

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<sup>37</sup> Discussion with the Chair of the NAC. Lusaka. 28 July 2008.



*Goal 8:* Nurture and promote the arts as an integral part of the lives of people in Zambia.

*Strategic objective:* Promote growth of the arts sector into a major contributor to the GDP of the country.

**Actions:** Consider reinforcing the institutional structure, provide a higher level of budgetary funds, and broaden the mandates of the National Arts Council to cover not only the arts but also other more technology-intensive and service-oriented creative industries, such as new media, design and creative services (advertising, web services etc.). The UNCTAD classification of creative industries, as shown in figure 6, which has a broader scope than the more traditional cultural industries, is a model that the Government may wish to take into consideration.

Consider a more inclusive policy to ensure that artists who are not yet members of a specific arts association are able to join, in order to have equal opportunities. A mechanism and an information campaign could be used to attract independent artists and creators to be affiliated. This would facilitate the move from the informal to the formal sector.

### 3.1.1 Cultural policy

The Fifth National Development Plan has a specific chapter on arts and culture. An official National Cultural Policy was published in 2003, recognizing that culture is one of the fundamental dimensions of development. The MCDSS–DCA is in the process of revising that policy, and a first draft of the new policy was prepared in June 2008.<sup>38</sup> The new national cultural policy is being designed to conform to the Fifth National Development Plan and to the Strategic Plan of the MCDSS. Among the guiding principles of the new cultural policy is the complementarity between culture and economic and sustainable development, which is an initial step recognizing the contribution of the creative sectors to the economic development of the country.<sup>39</sup>

The draft national cultural policy includes five main objectives:

(1) *Cultural research:* To undertake and facilitate cultural research in order to preserve, develop, promote and disseminate information and knowledge on cultural heritage for sustainable development.

The following measures are planned: (a) preparation of registers and inventories of Zambia’s cultural heritage; (b) creation of a national cultural research fund; (c) strengthening institutions for capacity-building in cultural research; (d) establishing botanic gardens for research in indigenous knowledge and genetic resources; (e) developing a national cultural research agenda; (f) establishing centres of excellence for cultural products and services; (g) ensuring that cultural institutions are properly funded; and (h) providing appropriate cultural research information for curriculum development.

(2) *Advocacy and public awareness:* Increase knowledge and appreciation of Zambian culture.

The following measures are planned: (a) organizing cultural festivals; (b) promoting special cultural celebrations; (c) establishing a national cultural week; (d) publicity campaigns; (e) the establishment of ethnotourism villages; (f) increases in support for cultural activities in schools and community-based youth organizations; (g) establishing partnerships with media institutions to disseminate and market cultural activities; and (h) ensuring that cultural infrastructures are accessible to all.

(3) *Indigenous knowledge systems (IKS):* To provide means for the sustainable use of IKS in national development programmes.

<sup>38</sup> Republic of Zambia. Ministry of Community Development and Social Services. National cultural policy (draft). June 2008.

<sup>39</sup> Ibid.

The following measures are planned: (a) establishing a legal framework for the protection of IKS; (b) incorporating IKS in the school curriculum (primary, secondary and tertiary); (c) developing comprehensive documentation centres for indigenous knowledge databases; (d) providing incentives for entities that commercialize indigenous knowledge; (e) creating means to reward holders of indigenous knowledge through the use of benefit-sharing principles; (f) promoting research, training and skills development; (g) disseminating information on the importance of IKS; and (h) promoting research and development in IKS.

(4) *Indigenous designs and cultural industries*: To promote Zambian indigenous designs and features in construction and in cultural industries, and to ensure the protection of copyright and intellectual property rights in cultural industries.

The following measures are planned: (a) establishing apprenticeship programmes for indigenous designs and cultural industries; (b) integrating indigenous design into the curricula of tertiary institutions offering arts and design; (c) promoting innovation in indigenous designs through scientific fairs; (d) integrating indigenous designs in trade fairs and commercial shows; (e) partnering with the media to promote knowledge and appreciation of indigenous designs; (f) establishing a cultural development fund for microfinancing for indigenous designs and cultural industries; and (g) cooperating with the Patents Office with respect to the protection of copyright and intellectual property rights (IPR) in indigenous design and cultural industries.

(5) *Preservation and promotion of tangible and intangible heritage*: To promote, conserve and manage movable and immovable heritage.

The following measures are planned: (a) conducting a heritage identification and diversification survey; (b) surveying cultural heritage sites and objects; (c) encouraging traditional methods and knowledge in the preservation of cultural objects; (d) implementing site development for tourism; (e) maintaining the status of cultural heritage sites and objects; and (f) nominating cultural heritage sites.<sup>40</sup>

The vision of the Fifth National Development Plan 2006–2010 in Arts and Culture is a *thriving national cultural heritage and cultural sector industry by 2030*. The goal is to *provide an enabling environment for safeguarding and promoting Zambian tangible and intangible heritage and to ensure the development and promotion of cultural industries*.<sup>41</sup>

**Action:** The draft cultural policy could be revisited with respect to the creative industries, giving it a clearer role in the overall policy towards the creative economy. For example, the current draft links indigenous design and cultural industries, and while this is clearly an important connection that can be made, the development of the creative industries could be included in a more comprehensive manner, emphasizing not only its cultural aspects but also its economic, social and technological dimensions.

The creative industries can be catalyst to support government efforts to further integrate Zambia into the world economy by increasing the competitiveness of its creative goods and services in global markets, while at same time promoting job creation, cultural diversity and social inclusion. According to UNCTAD, the creative economy deals with a set of knowledge-based economic activities with a development dimension and cross-cutting linkages at macro and micro levels with the overall economy.

The creative industries have significant potential for wider-scale development, since they produce tangible goods or intangible services able to generate revenues through trade and intellectual property rights. The sector encompasses the cycles of creation, production and distribution, of goods and services that have creative content, cultural and economic value and market objectives. In this regard,

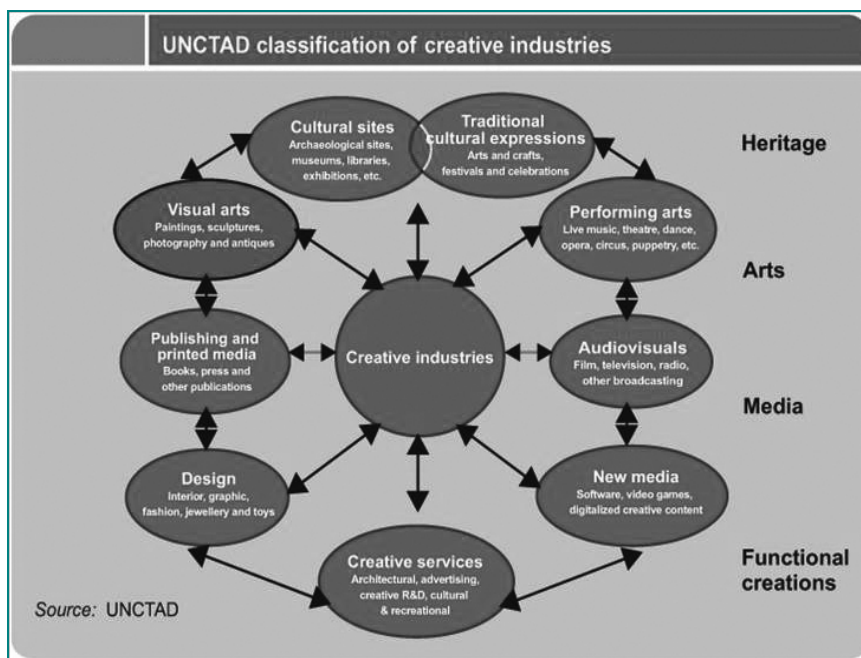
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<sup>40</sup> Republic of Zambia. Ministry of Community Development and Social Services. National cultural policy (draft). June 2008: 22–26.

<sup>41</sup> Fifth National Development Plan 2006–2010 on Arts and Culture.

the creative industries have been classified by UNCTAD as including creative goods and services related to cultural heritage, to the arts, to the media and to functional creations, with subsectors identified in each of these categories,<sup>42</sup> as shown in figure 6 below.

**Figure 6. UNCTAD Classification of the Creative Industries**



**Action:** The new national cultural policy could be finalized along the lines indicated above, and adopted. A clear implementation mechanism, indicating the time frame and the allocation of resources, should accompany the new policy, or possibly a broader creative economy strategy.

According to the draft national cultural policy, two of the MCDSS objectives with respect to culture are particularly relevant for the development of the creative industries. Notably, the MCDSS is responsible for helping develop, promote and market cultural goods and services, and is responsible for ensuring the relevant legislation. Eleven ministries, including the MCDSS, are cited in the national cultural policy as having responsibilities in the domain of culture.

If the policy recognizes the need for innovative multi-disciplinary policy responses to strengthen the creative industries, several line ministries should be involved in the process of policymaking: the Ministry of Science, Technology and Vocational Training, which is responsible for innovation, for information and communication technologies (ICTs) and for scientific innovation; the Ministry of Information and Broadcasting Services, which is responsible for the administration and protection of copyright; the Ministry of Tourism, Environment and Natural Resources, which is responsible for stimulating tourism and environmental protection; the Ministry of Local Government, which is responsible for Chiefs' Affairs; the Ministry of Education, which is responsible for arts education; the Ministry of responsible for youth policy; the Ministry of Commerce, Trade and Industry, which is which is responsible for the international trade of creative goods and services; the Ministry of Justice, which is responsible for the regulatory framework and competition policies; the Ministry of Sport, Youth and Child Development, the Ministry of Finance and the National Planning, which is responsible for fiscal and budgetary policies. As noted above, the MCDSS has, nonetheless, the task of

<sup>42</sup> Reference is made to the UNCTAD definition and classification of the creative industries and the creative economy, elaborated in 2006 by the Creative Economy Programme. This classification is also presented on page 14 of the *Creative Economy Report 2008* (UNCTAD/DITC/2008/2).

coordinating and implementing cultural policy. However, it should be noted that cultural policy is just one element to be considered in the overall strategy for the creative economy. It calls for concerted multi-disciplinary policy responses and inter-ministerial action.

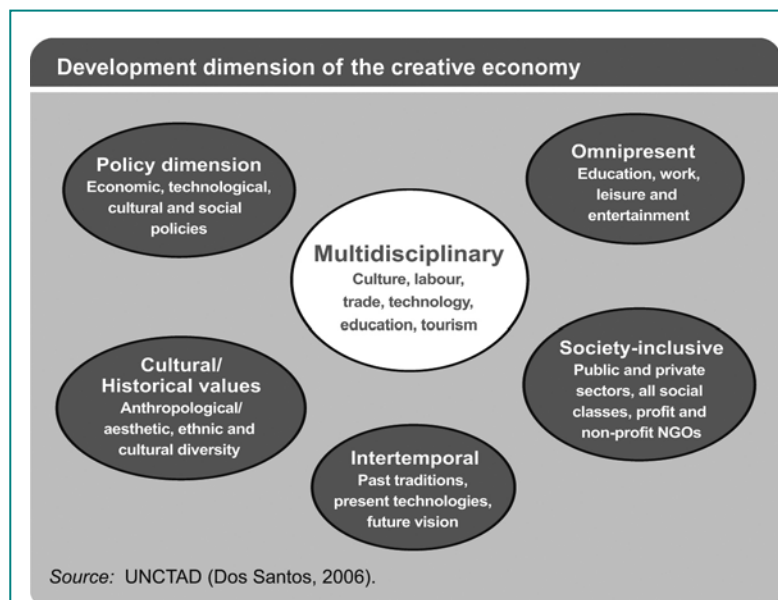
**Action:** Initially, the Government could set up a creative economy inter-ministerial committee or advisory board, with a representative from each relevant ministry and from key institutions. This institutional mechanism could evolve and set the basis for establishing a *Zambian Creative Economy Agency*. Each ministry would be member of the board, and should be responsible for policies in its respective area, such as fiscal and budgetary policies, trade and investment policies, IPR and competition policies, financing mechanisms, tourism, labour and SME issues, cultural and educational policies, social and rural integration, technology and ICT tools etc. UNCTAD is willing to continue providing policy advice in this regard.

A first step would be to organize a high-level conference to present and debate this report, as a forum to engage in a dialogue with all the stakeholders, harmonize views, and increase awareness on the subject. This action, indeed took place in July 2009, and as indicated earlier in this report, was followed by a commitment for the implementation of this plan of action and the setting-up of the Creative Economy Inter-ministerial Committee or advisory board.

Moreover, in order to be effective, the process should be participatory, involving stakeholders not only from government but also from the private sector, professional associations, the non-profit sector and civil society, and artists.<sup>43</sup> Figure 7 below underlines the key characteristics of the creative economy. As stated in the *Creative Economy Report 2008*, the creative economy extends to almost all areas of government policy, calling for an integrated cross-cutting approach.

An awareness-raising campaign could be initiated. The national cultural policy already calls for the establishment of a national culture week, and the campaign around the creative economy could fit into such a platform.

**Figure 7. The development dimension of the Creative Economy<sup>44</sup>**



<sup>43</sup> *Creative Economy Report 2008*. Chapter 10. Lessons learned and policy options: 203.

<sup>44</sup> This refers to the multifaceted aspects of the creative economy and its complex interactions with culture, labour, trade, technology, tourism, etc.

### 3.1.2 Financing

As in the great majority of countries, the cultural and creative industries are heavily dependent on public funds and incentives, mainly because traditionally they have been seen predominantly from a cultural rather than a commercial point of view. The time has come to change this misperception. The creative industry is a multi-billion-dollar business, and it should be seen not only from a cultural perspective but also as a profitable economic activity responsible for creating jobs and generating revenue and export earnings. The creative economy fulfils a dual role – as a tool for socio-economic growth on the one hand, and for cultural and human well-being on the other.

Many small and micro creative enterprises do not have access to credit facilities or to loans and investment which would make their business viable, and from which artists and creators would be able to make a living exclusively from their creative or artistic works, like any other professional. A major obstacle for local medium-sized businesses – particularly in non-traditional sectors such as the creative industries – has been the high real cost of domestic borrowing from local financial institutions, both for investments and working capital. Although this situation has improved recently, it still affects the creation of linkages between foreign and local firms, particularly in audiovisual-related areas, which require greater investment in equipment and technology. High inflation also makes business planning difficult.

**Action:** Financing should come from various sources: public funding, private investments, commercial loans, public–private partnerships, joint ventures, and international cooperation projects.

There is very little public funding available for the creative industries in Zambia. The primary source of funding is the National Arts Council, which allocates funds to its affiliated associations, which in turn disburse funds to their members.<sup>45</sup> All arts associations must have an audit made of their accounts before they receive any financing from the NAC.<sup>46</sup>

The NAC has set up an Arts Development Fund which benefits individual artists and arts associations with small projects, new associations, and other specific arts projects e.g. the recording and production of music. In the future, scholarship requests from individual artists will also be handled from this fund.<sup>47</sup>

**Action:** To consider expanding the funds and the scope of the National Arts Fund. It could incorporate sector-specific funds, i.e. a film and audiovisual fund, a fine arts fund, a design and innovation fund etc. The fund could be financed by a combination of public and private funding sources, including monies from industry transfers such as small taxes on DVD sales and/or tickets sold, or a percentage of broadcasters' receipts etc. Agreements could also be made with the private sector in terms of sponsorship, publicity as well as social and environmental responsibility, as a way of matching funds.

The NAC also organizes the annual Ngoma Awards, which are held to honour artists in the different creative sectors. Each winner receives 1,500,000 kwacha (approximately: \$320). In 2007, there were eight categories of awards: visual arts, drama, children's theatre, popular theatre, media arts, creative writing, contemporary and gospel music, and traditional music and dance.

**Action:** Additional or alternative categories, which take into account artistic and entrepreneurial work in the creative sectors, could be considered in this award process. For example, one could consider design awards (e.g. for jewellery, fashion, furniture, graphic design), as well as creative services awards (e.g. for architecture, advertising, web services). Alternatively, the current media award could

<sup>45</sup> Discussion with Chair of the NAC. Lusaka. 28 July 2008.

<sup>46</sup> <http://www.nationalartscouncil.org.zm>

<sup>47</sup> <http://www.nationalartscouncil.org.zm>



be expanded to include, for example, video films, video clips for music, animated films and television programmes etc.

**Action:** The Ngoma Awards are only given to people who are members of an association. These awards could be opened up so that they attract potential creative talent such as students, and independent artists, whether or not they are members of a registered association – this would encourage the winner to join. Efforts to facilitate joining by non-member artists should be made, too.

In summary, support mechanisms for the creative industries could include actions such as: (a) direct subsidies; (b) tax relief on income to promote investment; (c) granting preferential credit; (d) financial guarantees to help cover risks; (e) financial transfers (as mentioned above, industry transfer organized through public authorities); and (f) microcredit for independent artists, and for artists and artisans from rural communities.

### **3.1.3 Organization of the professional sector**

The NAC is the overall coordinating body for artistic activities in the country. An associative structure clearly characterizes the organization of professionals active in the various arts sectors. The associations listed below are members of the NAC:

#### **(a) National Theatre Arts Association of Zambia (NATAAZ)**

NATAAZ was established in 1986 as a result of a merger between TAZ and ZANTAA. (TAZ and ZANTAA operated as promoters of theatre in the country.) NATAAZ currently runs theatre programmes for schoolchildren and in smaller theatres all along the railway line. Membership: approximately 3,500 actors and performing arts professionals.

#### **(b) Zambia Association of Musicians (ZAM)**

ZAM came about from the Zambia Union of Musicians (ZUM) that was registered in 1979. ZAM has operated with stakeholders, such as record companies, and is the only association currently working with the Zambia Music Copyright Protection Society (ZAMCOPS). Membership: approximately 900 musicians.

#### **(c) Zambia National Visual Arts Council (VAC)**

This association was officially registered in 1989, although it had been active as an association prior to that date. The VAC is based in the Henry Tayali Centre. It has full-time staff who manages the general membership and the satellite centres in other provinces. VAC membership includes all types of visual and fine artists in the country; VAC also undertakes programmes for training and setting up material production centres. Membership: approximately 1,000 artists.

#### **(d) Zambia Folk Dance and Music Society (ZAFODAMUS)**

ZAFODAMUS is an association of folk dance practitioners. It was formed in 1996. It has been actively engaged in the introduction of group membership nationwide. Membership: approximately 1,900 artists.

#### **(e) Zambia Women Writers' Association (ZAWWA)**

ZAWWA was formed in 1994 to promote women authors. It is now open to all writers and is not gender-specific. ZAWWA's annual calendar includes publications, organizing writing and reading clinics, and attending book fairs.

#### **(f) Zambia Popular Theatre Alliance (ZAPOTA)**

This alliance was formed in 1990 and is active throughout the country. Its activities are focused on theatre for development. It carries out advocacy and awareness-raising campaigns sponsored by numerous NGOs and government departments. Its annual contribution to the NAC involves honouring groups that have excelled in theatrical methodologies and artistry. Membership: approximately 1,500 members.

**(g) Zambia Adjudicators' Panel (ZAP)**

The Zambia Adjudicators' Panel is a guild founded in 1990. It is comprised mainly of the more experienced and distinguished practitioners and academics. ZAP aims at providing quality adjudication at all levels of artistic competition in the country.

**(h) National Media Arts Association (NAMA)**

The NAMA was launched in 2000. Its aim is to stimulate and promote a vibrant media culture in the country.

**(i) Association of Theatre for Children and Young People in Zambia (ASSITEJ)**

The Zambian chapter of the Association of Theatre for Children and Young People was founded in 1999 and registered in 2001. Its main objective is to develop an interest in the theatre in primary school children.

Based on comments made by members of the associations mentioned above, some observations can be made. Almost all the associations noted the lack of professional training possibilities available to them, and emphasized the strong need for capacity-building, for example in terms of managerial skills. They pointed out the serious infrastructural limitations and the lack of access to materials and current information in each of their sectors of activity. The associations are generally run by volunteers, rather than by a full-time trained professional. The administrators themselves stated that they need to be more professionalized, so that they can offer a real service to their members.<sup>48</sup> For example, they do not have a secretariat, internet access, basic facilities etc. It should be pointed out that not all artists belong to an association. Indeed, the ZAM, which was clearly one of the most dynamic associations, noted that given its infrastructural, monetary and functional limitations, it has little to offer to musicians for the time being.<sup>49</sup>

**Action:** The NAC could organize capacity-building for associations in the fields of managerial skills and creative entrepreneurship; as well as specific training for the effective use of new technologies, in particular ICT tools, both for the creation of “creative digitalized content” such as for new media, videos, music and images, and also for the marketing, promotion and sale of all sorts of creative products via the web. The association could also provide training and assistance to establish websites with information and marketing strategies for artists.

At the provincial level, the NAC has established provincial arts advisory committees (PAACs) in all nine provinces to coordinate and reactivate the various artistic activities. Each PAAC is made up of the leaders of arts associations at the provincial level, the provincial cultural officer, representatives of government ministries and other institutions, and members of the general public who are interested in the promotion of the arts, as stipulated in the Act.

The PAAC has multiple roles, namely to promote and coordinate artistic activities in the various provinces in cooperation with the provincial cultural officers; to keep an inventory of artists, art organizations and promoters in the provinces; to monitor all the artistic activities taking place in the provinces; to monitor the activities of art associations in the provinces; to maintain financial accountability for the funds received from the NAC and from their own initiatives; to advise and assist

<sup>48</sup> Meeting with stakeholders. Lusaka. 29 July 2008.

<sup>49</sup> ZAM representative. Lusaka. 29 July 2008.



the NAC in the development and promotion of the arts in the provinces; to collect information on the arts and on artists and art organizations in the provinces for inclusion in the arts directory; to facilitate the NAC's research programmes in the provinces; to organize multi-disciplinary art festivals in the provinces; and to participate in provincial events of national interest, for example Independence Day celebrations and Labour Day celebrations<sup>50</sup>.

**Action:** The NAC could also offer the services of a legal adviser who specializes in IPR issues and contractual arrangements. Such advisory services would guide and assist artists in negotiating contractual arrangements, and in particular, with regard to offering their services in international markets. Another important function could be to set a national database to collect, analyze and share relevant sectoral data and information with the associations. This would also facilitate networking and the sharing of best practices with other associations, both in Africa and elsewhere.

### 3.2 REGULATORY FRAMEWORK AND LEGISLATION

Regulation in creative industries is a complex issue. National legislation cannot be drafted in isolation, but has to be aligned with commitments already made under multilateral processes and global instruments, such as World Trade Organization (WTO) rules, World Intellectual Property Organization (WIPO) regulations, United Nations Educational, Scientific and Cultural Organization (UNESCO) conventions, and other similar international legal instruments. Furthermore, national legislation has to be compatible with regional cooperation treaties and integration agreements, such as those of the African Union and the Southern African Development Community (SADC), and with EU-ACP economic partnership agreements etc. Therefore, developing countries have very limited autonomy or policy space to review national policies in areas related to the creative industries, particularly in sensitive areas such as audiovisual and other creative services.

Nowadays, there are growing tensions between international integration and national policy autonomy, mainly due to two factors: (a) the policy agenda pursued by most developing countries over the last two decades has not resulted in the desired acceleration of economic development; and (b) the globalization and internationalization of markets have, in most cases, weakened the effectiveness of domestic policies. This debate remains unsettled.<sup>51</sup>

The following are the most important pieces of legislation for the creative industries in Zambia:

- (a) As has already been mentioned, the National Arts Council of Zambia was established under Act No. 31 of 1994 of the Laws of Zambia, and became operational in 1996;
- (b) the Zambia Independent Broadcasting Authority Act 2002;
- (c) the Zambia National Broadcasting Corporation (Amendment) Act 2002; and
- (d) the Media Law and Media Policy Act 1996.

**Action:** The Ministry of Information and Broadcasting Services states among its objectives the updating of these laws to ensure compliance with other updated laws. If possible, despite the external constraints, efforts should also be made to update its objectives in terms of encouraging the film, audiovisual and media industries.<sup>52</sup> UNESCO may wish to provide technical assistance in this regard.

**Action:** A film law and implementation policy should be established. Issues related to national quotas, tax incentives and other types of preferential treatment should be duly examined, taking into account

<sup>50</sup> <http://www.nationalartscouncil.org.zm>

<sup>51</sup> See: UNCTAD (2008). Policy space: What, for what and where? Discussion paper 191, by Jörg Mayer. Geneva. October.

<sup>52</sup> Republic of Zambia. Ministry of Information and Broadcasting Services. *Strategic Plan for the Ministry of Information and Broadcasting Services 2006–2010*: 20.

some built-in flexibilities for LDCs in the context of the General Agreement on Trade in Services (GATS) under negotiation at the WTO Doha Round and the implementation of the UNESCO Convention on the Protection and Promotion of the Diversity of Cultural Expressions. UNESCO technical assistance may be required.

**Action:** To strengthen the legal and regulatory framework for the creation of cooperatives for cultural and creative enterprises, including the registration of such entities, their constitutions, and their labour policies. ILO may provide technical advice on these issues.

### 3.2.1 Competition policy

The competition policy is governed by the Competition and Fair Trading Act, which aims to encourage competition by prohibiting anti-competitive business practices and by regulating monopolies and the concentration of economic power. The Act protects consumer welfare and strengthens the efficiency of production and distribution of goods and services. The Zambia Competition Commission was established under the Act, to guard against anti-competitive business/trade practices and to protect the interests of the consumer.<sup>53</sup> It also prevents predatory behavior, discriminatory pricing, and restrictions on distribution. The Commission also plays an important role since it must authorize all mergers and acquisitions before they are completed.

As is the case in most creative industries, distribution channels for creative products in Zambia are dominated by large multinationals. Therefore, it is important to have competition policies in place, with a view to safeguarding the interests of local creative enterprises and artists in the domestic and the global market.

**Action:** The reinforcement of competition policy is of great relevance to the creative industries, particularly to allow fair competition between national and highly concentrated foreign companies with leading positions in value-added products such as audiovisuals, new media and creative services. UNCTAD could provide further assistance in this regard, if required.

### 3.2.2 Employment conditions

In general, employment conditions in Zambia are covered by the Employment Act, which is under review. This is the fundamental law providing the basic parameters for employment conditions, such as the minimum contractual age, the establishment of employment contracts, dispute settlement, and the appointment of labour officers. It also provides for certain conditions of employment, such as ordinary leave, sick leave and maternity leave etc.<sup>54</sup> However, as most artists and creative professionals are self-employed or work in the informal sector, they do not benefit from the usual rights and obligations prescribed by the Industrial and Labour Relations Act of 1993.

Social and economic security for artistic workers and creative professionals is essential to change the traditional misperception that creative activities are transitory activities, or recreation or hobbies. Comprehensive national legislation is required to regulate the relationship between workers in the creative industries and employers, in order to set up a social and economic security scheme for these workers. Why is this important? Many artistic workers have to become entrepreneurs out of necessity; they are the first to set up small enterprises, and the first to look for clients and contracts, thereby creating job and income opportunities.

This is a fundamental issue to address, because although the law is advanced in terms of rights, it does not cover artistic or intellectual activities. Therefore, it is crucial to address this issue so that artists (composers, actors, audiovisual creators, audio assistants etc.) can be covered by a wider framework of social and economic protection, offering these workers a sense of security.

<sup>53</sup> <http://zamcom.smetoolkit.org/zambia/en/>

<sup>54</sup> For further information, see UNCTAD's *Investment Policy Review of Zambia*.

The DCA and the NAC apply wage standards when they employ local artists, and they are working towards the implementation of national wage standards for the creative sectors. In addition, the Government is putting in place a programme to facilitate the integration of disabled artists into the job market.

It is widely recognized that employment conditions for artists are often very precarious in most countries. Artists' contractual obligations are usually project-based, with long periods of unemployment between engagements. Most artists, particularly in the performing arts, work on an irregular, part-time or self-employed basis, and their coverage by pension and medical schemes is limited or non-existent.<sup>55</sup>

**Action:** A social security scheme for artists is in the process of being put in place. Professionals active in the creative economy – such as Yezi Arts Promotions and Productions – have been central in pushing forward the necessity for such legislation.<sup>56</sup> During the implementation of this project, ILO could provide technical assistance and support for the adoption of a social security scheme for workers in the creative industries.

As in the majority of developing countries, there are a large number of artists in the informal sector. This makes it difficult for governments to formulate labour policies and to measure the employment generated by the creative industries. Zambia already has a good structure of professional organizations in place, as described in section 3.1.3; a large number of creative workers are registered in their respective associations. This provides a good basis for categorization by size of sector, type of activity, and numbers employed in creative enterprises, as a first step for the mapping of the creative industries at national level. In this regard, the classification of occupational categories for the cultural and creative sectors is an important issue.

**Action:** To strengthen the role of the NAC and/or to create complementary institutional mechanisms with the mandate to set up a computerized database to compile, assemble, analyze and disseminate quantitative and qualitative economic, social and cultural indicators for each creative industry. Initially, surveys could be sent to the professional associations and to the provincial arts advisory committees, as the starting point of a process that would be evolving and continuous. ILO is developing the framework for all occupational categories in the cultural sector, and certainly will be willing to provide technical advice in this area during the implementation of this multi-agency project.

### 3.3 INTELLECTUAL PROPERTY RIGHTS

The evolution of the Internet and the digital technology has created an open market for the distribution and sharing of intellectual properties. The protection of intellectual property rights has become one of the most difficult challenges for creative industries, affecting governments, artists, creators, analysts and agencies alike. The most significant challenge is how legal and policy frameworks can keep up with the constant change.

While copyright remains the fundamental guarantor of the rights of authorship, the Creative Commons movement is winning favour among artist, creators and educators looking to protect their intellectual property rights. Creative Commons (CC) is a non-profit corporation dedicated to making it easier to share creative works within the rules of copyright<sup>57</sup>. CC licenses are not an alternative to copyright but are a permissive tool for facilitating the release and waiver of rights, primarily for works of low immediate commercial value. There are now more than 250 million CC-licensed items on the Internet.

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<sup>55</sup> *Creative Economy Report 2008*: 118.

<sup>56</sup> Times of Zambia (2007). Artistes' social security scheme long overdue. 15 September. <http://allafrica.com/stories/printable/200709150151.html>

<sup>57</sup> Based on an article by Ahrash Bissle, Executive Director, CC Learn, Creative Commons, published by the International Trade Forum ITC, Issue 3/2009. For more information about Creative Commons visit [www.creativecommons.org](http://www.creativecommons.org).

### 3.3.1 Intellectual Property Rights in Zambia

Zambia has a long intellectual property rights (IPR) tradition. It signed the 1883 Paris Convention, on protecting industrial property, and the 1886 Berne Convention, protecting literary and artistic works. The Patent Act, the Trademark Act, the Registered Design Act and the Copyright and Performance Rights Act of 1994<sup>58</sup> are the instruments that provide the legal framework for the protection of intellectual property rights in Zambia.

As a member of WTO and an LDC, Zambia signed the Trade-Related Aspects of Intellectual Property Rights (TRIPS) agreement in 2005. Zambia is also a member of WIPO, and of the African Regional Intellectual Property Organization (ARIPO).

Copyright is the IPR law that provides protection to original works of authorship such as paintings, sculptures, music, novels, poems, plays, dance, architecture and software. This legislation provides protection for 50 years (copyright) and 5 years (registered design). It is important that Zambian artists be able to derive the benefit from their works. Today, in a growing number of countries, procedures to register became simpler and creators and artists can easily register their artistic creations through internet by clicking "copyrights".

In Zambia, issues of IPR are vested in two Ministries namely the Ministry of Commerce, Trade and Industry (MCTI) and the Ministry of Information and Broadcasting. The Patents and Companies Registration Office (PACRO), which is an executive Agency of the MCTI, administers the Industry Property aspect of Intellectual Property Rights and Neighboring Rights. The Government of Zambia has mandated PACRO to administer IP issues through three acts. These are the Trademarks, Patents and Industrial Designs. However, these Acts do not specifically provide for the protection of traditional knowledge, expressions of folklore and genetic resources. The TRIPs Agreement makes provisions to protect these resources either as patents or under a sui generis system. Zambia has until 2013 to make its laws in IP compliant with the TRIPs Agreement.

Many countries in the region of southern Africa do not have intellectual property policies. However, Zambia has completed formulation of the policy document which has since been submitted to Government for approval. It was observed that Zambia has not utilized the full potential of Intellectual Property as a tool for social and economic development although intellectual property legislation has been in existing dating back to the pre-independence days. Despite having an abundance of Genetic Resources, Traditional Knowledge whose intellectual Property can significantly contribute to the social and economic development of the country if properly and effectively harnessed. The formulation of this policy is therefore aimed at encouraging investors, innovators and creators to work hard so as to reap the benefits of intellectual property rights for example, through payment of royalties. The ethical basis of this policy, in principle with regards to appropriate intellectual property protection was to promote policy objectives that are consistent with widely ethical norms and values. In this regard, the policy will endeavor to reflect and promote an inherent entitlement for reward and recognition of one's intellectual and creative contributions on one hand while on the other, promote a strong utilitarian flavor to Intellectual Property law and policy, as a conscious tool to promote social welfare.<sup>59</sup>

Copyright administration is the responsibility of the Ministry of Information and Broadcasting Services. In 2002, the Copyright Office established a copyright taskforce to advise the Government. As a requirement of the Copyright Act, the Copyright Office established the Zambia Music Copyright Protection Society, in 1994. It deals with the financial aspects of collective management of rights, and is registered with the Ministry of Information and Broadcasting.

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<sup>58</sup> <http://www.aripo.org>

<sup>59</sup> Policies, measure and experiences regarding intellectual property and generic resources: submission by Zambia to the World Intellectual Property Organization, February 19, 2010.

It attempts to regulate the copyright law with respect to public performance and broadcasting of music for its 500 members. The Society has collected 25 per cent of copyright royalties annually since 1996, which it apparently distributes to members once a year. The society collects from broadcasting stations, such as the Zambia National Broadcasting Corporation, and from various radio stations.<sup>60</sup>

**Action:** Create, for example, a Zambian copyright society that has a broader approach – one that is not only restricted to the music sector. Or, encourage the creation of a national federation of collecting societies that joins together the different creative sectors in a type of loose affiliation. A focus on the adoption of the legislation and regulatory measures is needed. UNESCO and WIPO have expertise in this field and could provide technical assistance in this area in the course of the implementation of the project.

According to stakeholders, very few people in the country actually have knowledge of IPR issues, and there are no institutions in place to obtain information, for example, on how to deal with copyright abuses. Indeed, very few artists are able to collect any revenues at all.<sup>61</sup> In this regard, the Ministry of Broadcasting has reiterated its willingness to put in place a more user-friendly system for copyright administration. This will be very helpful for all artists – not only those from the big cities, but also those living in the provinces.

Some artists sell their rights outright, according to the buyout concept. Usually, the rights for an artistic work are sold for a specific territory and for a specific time period and in a specific medium. In concrete terms, that would mean – for example – selling the rights to a film to be shown in cinemas (or on DVD or video on demand (VOD), in Zambia (as opposed to another country or region), and for a period of five years, for a specific sum of money. Some artists end up selling all the rights to their film or their music without being able to negotiate any of the details, because they have little leverage to do so. Associations and unions can help individual artists or managers to be more aware of their options and can help them to negotiate better deals, in a fair manner, so that they can earn income from their creative works.

**Action:** Capacity-building training and awareness of rights issues for professionals in the creative industries and for civil society is a priority issue. The Government can also officially request technical assistance from the WIPO secretariat, taking into account the projects currently being carried out in the framework of WIPO's Development Agenda.

Due to Zambia's rich cultural and ethnic heritage and the large number of indigenous communities, issues related to indigenous design are of crucial importance. Better understanding of the international legislation and of the conditions that apply to issues such as the certification of origin, and labeling, is essential. Making traditional cultural expressions publicly available does not necessarily place them in the "public domain".

**Action:** It would be useful to refer to the legal mechanisms and practical tools for the protection of traditional knowledge and traditional cultural expressions (folklore) against misappropriation and misuse, and the intellectual property aspects of access to and benefit-sharing in genetic resources.<sup>62</sup> Many indigenous organizations, museums, archives and researchers have called for guidance in the process of recording and digitalization of indigenous knowledge for the WIPO Creative Heritage Project.

**Action:** The current "copyright and related rights" international legislation needs revision, in order to address the needs and concerns of developing countries. Zambia and other African countries should be

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<sup>60</sup> Times of Zambia (2005). ZAMCOPS poised to lessen piracy in Zambia. <http://www.times.co.zm/news/viewnews.cgi?category=8&id=1100088761>

<sup>61</sup> Stakeholders' meeting with artists and associations. Lusaka. 29 July 2008.

<sup>62</sup> Useful information can be found at: <http://www.wipo.int/tk/en>



involved in the process and defend the interests of its artists and creators in the context of the proposals and deliberations being negotiated under the WIPO Development Agenda.

Zambia has a rich variety of traditional cultural expressions and indigenous knowledge, such as traditional dance and music, indigenous design and performances, which embody cultural identity and heritage. This traditional knowledge should be protected and promoted.

**Action:** The Government could request the assistance of WIPO's Creative Heritage Project to provide information technology (IT) support on the recording, digitalization and dissemination of cultural materials by indigenous communities.

Attention should also be paid to the linkages between copyrights and new technologies and internet use for selling digitalized creative content, including issues related to collective management. The current IPR legislation has great lacunae and should be revisited, taking into account the specific needs of developing countries – in particular the LDCs – with a view to ensuring that actions are consistent with national objectives and development goals. The priorities identified by the stakeholders in the area of intellectual property were: (a) funding; (b) awareness and understanding of the regulations; (c) the necessity of going into the field to do training on a broad scale; and (d) technical and legal advice for artists to protect their rights.

At a regional scale, although there have not been many regional policies dealing with IP, Common Market for Eastern and Southern Africa (COMESA) came up with a regional policy which has a bearing on intellectual property vis-à-vis traditional knowledge. Currently, there is a policy formulated by COMESA which deals with IP and Trade. This policy has also encompassed the protection of traditional knowledge and IP. The recent development in biotechnological sciences and rise in patents in the field of biotechnology have put tremendous pressure on the Traditional Knowledge located in developing countries including for COMESA member states. The policy recognizes that a lot of money is raised from genetic resources; however, there is rampant bio-piracy in the region and this has raised a lot of concern.

In conclusion, protection of Traditional Knowledge, Genetic Resources and Folklore has not been given prominent attention in much legislation available. This has resulted in very limited protection for these very important resources. Many countries in the region either do not have policies on IP or are just beginning to prepare them. Furthermore, IP laws are outdated and have no provision for the protection of TK, FR and Folklore. It is only recently that organizations like COMESA and ARIPO have taken initiatives to include the protection of TK, GR and Folklore in their policies and protocols. This is a step in the right direction.<sup>63</sup>

### 3.4 FISCAL POLICY

The Income Tax Act, the Customs and Excise Act and the Value Added Tax Act are the basic laws that cover Zambia's tax system. The general corporate tax rate is 35 per cent. However, there have been a number of preferential rates and generous allowances for sectors that the Government has wished to promote. Value added tax of 17.5 per cent was introduced in 1995.<sup>64</sup>

At present, there are no specific fiscal incentives in place to benefit and encourage the creative industries in Zambia. On the contrary, as in most developing countries, creative products such as music, films and audiovisuals are classified as "luxury items", and tariff structures are usually unfavorable to domestic creators; in the case of imports of musical instruments and audiovisual and new media equipment, for instance, Zambia has very high import duties.

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<sup>63</sup> Conclusion of the document submitted by the Government of Zambia to the Intergovernmental Committee on Intellectual Property and Genetic Resources, Traditional Knowledge and Folklore of the World Intellectual Property Organization at its Sixteenth Session, Geneva, May 2010.

<sup>64</sup> UNCTAD's *Investment Policy Review of Zambia*.

**Action:** The Government is encouraged to provide tax exemptions and reductions in duties and levies for the import of equipment used by creative enterprises to produce local creative content. In this regard, the involvement of the Ministry of Finance in the Creative Economy Inter-Ministerial Committee is crucial. The Government seems open to examining proposals for tax exemptions from the creative sector.<sup>65</sup>

A special fiscal regime was granted to the tourism industry, in particular for hotel development, to promote Livingstone as a point of access for tourists visiting the Victoria Falls. Similar arrangements could be made for the construction of a large multi-purpose concert hall/theatre facility, which would provide the infrastructure to organize festivals and big performances, show movies etc. Incentives provided to foreign investors could also be extended to national investors, at least for the initial years.

**Action:** The Government is encouraged to enact legislation to provide fiscal incentives to artists, cultural producers and the corporate sector to encourage the organization of big cultural performances for tourists and for the local population.

**Action:** The Government could consider revising the tax breaks for the corporate sponsorship of the arts and culture, with a view to greater and sustainable benefit for the local creative sectors.

**Action:** The Government is encouraged to establish a system of tax rebates for investment in the creative sectors. For example, in Germany, a 20 per cent tax rebate in the film sector is available; however the rebate depends on fulfillment of specific conditions. For example, a German cinema distribution deal must be confirmed with a minimum number of copies for release, a certain amount of the overall spending must be in the country, etc. By linking the rebate to specific conditions, is the only way to ensure that the local sectors can benefit.

### 3.5 INVESTMENT

Investments in Zambia – foreign or domestic – are required to make an application under the Zambia Development Agency (ZDA) Act 2006. The company undergoes a screening process in order to get approval to invest. Some guarantees for foreigners are contained in the bilateral investment treaties.

A scheme to promote investment in the high-growth and more value-added sectors of the creative economy could greatly contribute to supporting the Government's goal of accelerating the National Economic Diversification Programme, and be a way to enhance creative supply capacities in the country. For instance, Zambia has an abundance of precious and semi-precious gemstones. These include emeralds, tourmalines, aquamarine and amethyst (Africa's largest deposit). Why not target the creative jewellery sector and attract investors and jewellery creators to the production of high-quality jewellery in Zambia, instead of exporting all the gemstones as a raw commodity? Provisions to encourage private sector investment in this area could be explored.

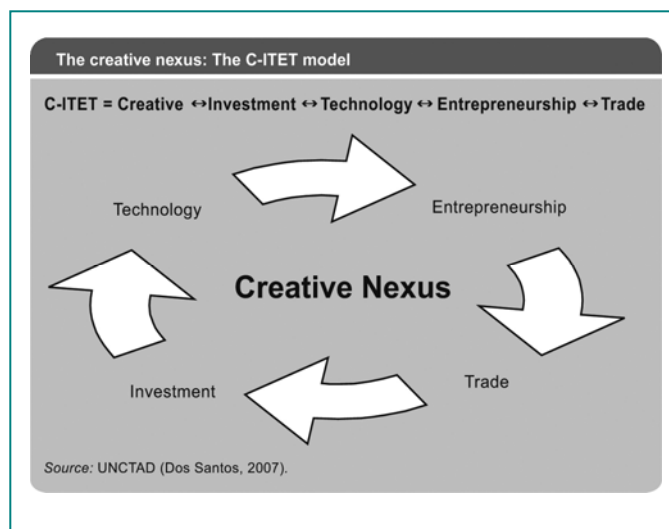
The same applies to textiles, as Zambia has a comparative advantage of availability of cotton and polycotton yarn, which could be used for the textile industry to produce distinctive ethnic designs and branded garments with high quality standards. Zambia has unlimited duty-free and quota-free access to the large United States market, under the African Growth and Opportunity Act (AGOA).

In this regard, UNCTAD proposes the "creative nexus" model as a way to stimulate private investment, attracting new technologies, promoting entrepreneurship and setting the basis for an export-led strategy for the creative industries. In this scheme, effective public policies would bring about a virtuous circle, as shown in figure 8.

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<sup>65</sup> At the UNCTAD High-Level Policy Dialogue on Creative Industries, held in Lusaka on 2 July 2009, a high official from the Ministry of Finance invited the artists to submit proposals for tax exemptions up to 17 July 2009. Proposals can be submitted every year.



**Figure 8: The Creative Nexus: C-ITET model<sup>66</sup>**

Moreover, the Zambian Government has committed itself to “create a vibrant private sector that would be exposed to competitive best practices at the international level”. As part of this strategy, a private sector development investment promotion programme has been elaborated, with the assistance of UNCTAD and funding from the Japan Bank for International Cooperation. UNCTAD’s *Blue Book on Best Practice in Investment Promotion and Facilitation: Zambia*<sup>67</sup> proposes investment promotion activities and minor legislative or regulatory changes to improve the investment climate in the country; its recommendations have already started having a very positive impact. Zambia’s FDI flows have registered a sharp increase in recent years, growing from \$357 million in 2005 to \$984 million in 2007.<sup>68</sup>

**Action:** A strategy could be put in place to attract foreign and domestic investment, in more technology-intensive creative sectors with greater competitive advantage in world markets. Joint ventures and public–private partnerships could be forged, allowing for strategic business alliances, particularly in the areas of design, new media and creative services. Further assistance from UNCTAD could be envisaged.

### 3.6 ENTREPRENEURSHIP AND THE SMALL AND MEDIUM-SIZED ENTERPRISES

The Industry Division of the Department of Commerce, Trade and Industry is in the process of developing a programme to benefit small and medium-sized enterprises (SMEs).<sup>69</sup>

The encouragement of SMEs is crucial to the development of the creative industries in developing countries. As is emphasized in the *Creative Economy Report 2008*, most SMEs are micro or sole trader businesses, which predominantly populate the various stages of the supply chains of creative products in many countries, from the initial ideas, creation, production and distribution up to the

<sup>66</sup> Creative Economy Report 2008, The challenge of assessing the creative economy: toward informed policymaking: 41.

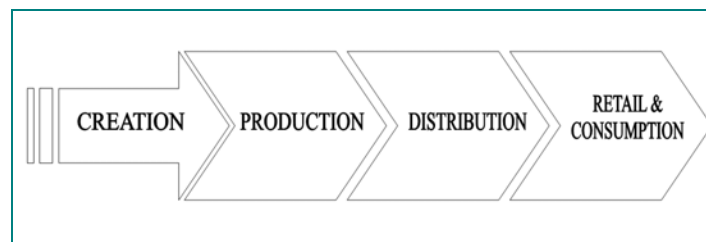
<sup>67</sup> <http://www.unctad.org/Templates/Page.asp?intItemID=4396&lang=1>

<sup>68</sup> UNCTAD (2008). *World Investment Report 2008: Transnational Corporations and the Infrastructure Challenge*.

<sup>69</sup> Department of Commerce, Trade and Industry. Meeting with National Trade Experts. Lusaka. 31 July 2008.

consumer in world markets.<sup>70</sup> Micro and small enterprises are especially evident at the top of the supply chain (at the creation stage).

**Figure 9. The Creative Industry Value Chain**



Source: UNCTAD

**Action:** Create an SME development policy that incorporates creative enterprises, based on a tailor-made microenterprise development plan. To provide services and facilitate the establishment of SMEs, by speeding up the registration process, facilitating licenses, avoiding redundancies etc. This initiative could certainly be a catalytic tool for effective social inclusion measures, helping to bring the informal sector into existing organizational structures, such as professional associations.

There is currently a project under way involving the International Finance Corporation, ELIF Business Solutions, and the Common Market for Eastern and Southern Africa (COMESA), entitled the SME Toolkit Zambia. The SME Toolkit offers free business management information and training to SMEs on accounting and finance, business planning, human resources, marketing and sales, operations and IT. It offers a wide range of how-to articles, business forms, free business software, online training, self-assessment exercises, quizzes and resources to help entrepreneurs, business owners and managers in emerging markets and developing countries to start up, finance, formalize and grow their businesses.<sup>71</sup>

Moreover, in the context of this multi-agency project, ILO has developed a specific business skills and training module for artists and creators, with a view to assisting creative entrepreneurs in setting up and promoting their business activities. This activity will be the most important contribution by ILO to this project.

**Action:** The SME Toolkit Zambia website could be enhanced to include a special section for the development of creative industries. Furthermore, ILO will provide training on cultural and creative entrepreneurship for trainers, professional associations and relevant educational institutions.

Another important aspect to consider is business linkages between transnational corporations (TNCs) and SMEs. This is potentially one of the fastest and most effective ways of upgrading domestic enterprises; facilitating the transfer of technology, knowledge and skills; improving business and management practices; and facilitating access to finance and markets. Strong linkages can also promote production efficiency, productivity growth, technological and managerial capabilities, and market diversification, in local firms.

**Action:** Discuss with stakeholders, linkage promoters and foreign affiliates, to establish more and deeper sustainable linkages.<sup>72</sup> Establish a linkages programme to identify and upgrade local enterprises that have the potential to supply to and to learn from foreign affiliates (large firms) and subsequently

<sup>70</sup> On this point, see pages 69 and 183 of *Creative Economy Report 2008. The challenge of assessing the creative economy: towards informed policymaking*. UNCTAD/DITC/2008/2.

<sup>71</sup> <http://zamcom.smetoolkit.org/zambia/en>

<sup>72</sup> UNCTAD (2006). *Business Linkages Programme Guidelines*. UNCTAD/ITE/TEB/2005/11.

become exporters in their own right. Such programmes have been successful in a number of emerging economies.<sup>73</sup> UNCTAD has already provided the elements for a pilot project for Zambia.

Considering the large number of TNCs operating in the mining field, the Government – as well as creative entrepreneurs – could propose target contractual arrangements to facilitate TNC–SME business linkages to support the creative industries. Advantage should be taken of the fact that many TNCs have a social responsibility policy, which in many cases could be oriented towards supporting cultural and artistic activities.

Sponsorship by TNCs should also be explored, to promote a more vibrant cultural life in the country, particularly in terms of involving TNCs with the building of infrastructure facilities for the theatre, cinema and concerts etc. One example could be to create a group of TNCs to finance the renovation of the Lusaka National Theatre (which is very old and in a very precarious condition); concerts, theatre and dance would benefit from a suitable facility.

Many of the skills and professions related to the creative industries are not well perceived in business terms, which make access to funding and/or credit extremely difficult, particularly for SMEs. The possibility of microcredit schemes should be explored, given that there have been some successful cases in other developing countries.

The Ministry of Community Development and Social Services oversees the Micro Bankers Trust.

**Action:** Given that the Department of Cultural Affairs and the Micro Bankers Trust are both housed within the same ministry, their natural proximity could be better tied up by establishing a special programme for microloans for the creative industries.

Public–private schemes can be especially useful in this area. The measures to facilitate such a process can include public guarantees for loans that can be combined with a lending credit line from a local bank. In addition, entrepreneurs can be made more “bankable” by lowering transaction costs and streamlining the credit risk assessment procedure. Another strategy is to screen business proposals in order to minimize the risk of default.

**Action:** Establish microfinance schemes to encourage the development of creative enterprises, in particular through public–private cooperation. ILO has expertise in this area and could provide technical advice to stakeholders in this project.

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<sup>73</sup> UNCTAD (2006). *Investment Policy Review of Zambia: Strategic Perspectives on FDI and Diversification*.

### 3.6.1 A successful case of creative industries in Africa

#### **The Biennale of Contemporary African Art of Dakar: A Contribution to Economic and Cultural Development in Africa**

For several years Africa has proposed a variety of events for the promotion of different forms of artistic expression. The Biennale of Contemporary African Art of Dakar undoubtedly makes a critical contribution to ensuring the promotion of artists and the diffusion of contemporary creative works within and beyond the continent.

The Biennale of Contemporary African Art was born from the desire of the Government of Senegal to position Dakar as a place of encounters and cultural exchange for the entire African continent. The event started as a Biennale of Arts and Literature in 1990, with literature occupying a predominant place. Dak'Art was organized for the first time in 1992, and since then, the visual arts component has moved to the forefront. Nowadays, 289 artists from 34 African countries, with 16 representing the African Diaspora and 123 from the rest of the world participate. Among the countries with the highest rates of participation in the Dak'Art exhibitions are Cameroon, the Democratic Republic of the Congo, Ivory Coast, Morocco, Nigeria, Senegal and South Africa. Furthermore, in 1996, the Biennale started to incorporate the Salon of Design, which showcases the work of talented designers from Africa: 92 creators were selected to represent 15 countries from the African continent during the period 1996-2006.

Dak'Art 2006 also was attended by 63 art critics, 25 specialized press agents, 19 African journalists, 32 representatives from galleries and museums, 13 organizers of 7 Biennales at the international level and a dozen of art collectors. Several important events were scheduled for 2008; the first one is Africa Now, an important programme under the initiative of the World Bank and in honor of Africa. The second one is the first Foire d'art contemporain African de Tenerife in Spain. In addition, the Biennales was associated with the UNCTAD secretariat for launching the "Creative Africa" initiative during the UNCTAD XII Ministerial Conference held in Ghana in 2008. Dak'Art 2010 edition "Retrospective and Perspective" saw the participation of young contemporary creations with 28 artists that never participated before at the Biennale coming from 16 African countries.

The economic spillovers of Dak'Art are linked mainly to the sales of important Africa art works. The event is also beneficial for several economic activities such as international tourism, international transportation, local transport, the hospitality industry and other services. In brief, Dak'Art is an illustration of the positive impact of international cultural manifestations for socio-economic development.

By Ousseynou Wade, Secretary-General of the Biennale of Contemporary African Art, Dakar, Senegal. Website: [www.biennaledakar.org](http://www.biennaledakar.org).

### 3.7 TRADE

Africa has a very weak presence in global markets for creative goods and services, mainly due to its very limited supply capacity. In fact, this observation applies to all the ACP countries – the 78 countries of Africa, the Caribbean and the Pacific – whose total exports of creative goods amounted to only \$1.75 billion in 2008, according to UNCTAD figures<sup>74</sup>. Given their abundance of creative talent, the creative potential of these countries is undoubtedly extremely underutilized.

According to official data, Zambia exports of creative goods amounted to \$8.9 million in 2005 and dropped sharply to \$2.3 million<sup>75</sup> in 2008. Nevertheless, this first attempt to analyze the export performance of the creative industries in Zambia should be seen with caution. It is important to check and improve the quality of trade figures; particularly for year 2005 since a sharp increase was observed. Efforts should be made to further enhance creative capacities and improve the export performance of the most competitive creative sectors.

The issues related to multilateral trade negotiations and market access for cultural and creative goods and services are very complex. They involve several agreements, such as the General Agreement on Trade in Services (GATS), the Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS) and the Agreement on Trade-Related Investment Measures (TRIMs); they also involve competition policies, trade efficiency, and most importantly, special and differentiated treatment for developing countries. For instance, temporary access for artists from developing countries to supply services in major markets – the so-called mode 4 at WTO negotiations, or, in other words, the mobility of artists to provide creative services in global markets – is a key issue for the expansion of trade in creative services.

In terms of market access, Zambia, in line with other LDCs, has duty-free quota-free access to the European Union under the Everything But Arms initiative for LDCs, which was introduced in 2001. It should be noted, however, that Everything But Arms (Generalized System of Preferences Plus (GSP+)) is a unilateral preferential scheme for LDCs granting market entry under very stringent rules of origin.

More generally, according to the WTO review of developed country unilateral preferential schemes in favour of LDCs, on average (weighted), LDCs benefit from preferential duty-free treatment on nearly 84 per cent of the dutiable most favoured nation (MFN) tariff lines. Coverage is 100 per cent, or close to it, for non-agricultural commodities (raw materials and minerals, including fuels). Over 88 per cent of manufactured products can potentially benefit from the preferential duty-free treatment.

Creative services are granted market access in all modes of supply in accordance with the existing GATS commitments and limitations on WTO members.

The EPA between COMESA and SADC may represent new opportunities for achieving market access on a permanent basis.

Zambia's main problem – like many other LDCs is its limited supply capacity. At this juncture, the key issue is developing productive creative capacities, rather than market access. In a simplistic way, the country first has to create and produce, before looking into trade opportunities and a bigger presence in world markets. Lack of infrastructure, high transportation costs, and macroeconomic instability, such as the weakness of exchange rates, are some of the main structural impediments hampering the export of creative goods from Zambia.

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<sup>74</sup> Creative Economy Report 2010, UNCTAD and UNDP.

<sup>75</sup> UNCTAD, Global Database on Creative goods and services. See <http://www.unctad.org/creative-programme>

The Department of Commerce, Trade and Industry has indicated that efforts continue to be made to promote exports, in particular, from the art crafts sector.

**Action:** Greater advantage should be taken of the available preferential schemes granted by developed countries – including the AGOA preferences – to expand the export of art crafts to the United States, through targeted networking, market promotion strategies, and higher-quality exportable products.

**Action:** Under this project, UNCTAD envisages to provide trade- and investment-related capacity-building with respect to the creative industries for policymakers and relevant professional associations. Issues related to multilateral trade negotiations, regional agreements and market access would be addressed and better understood.

**3.7.1 South-South Trade**

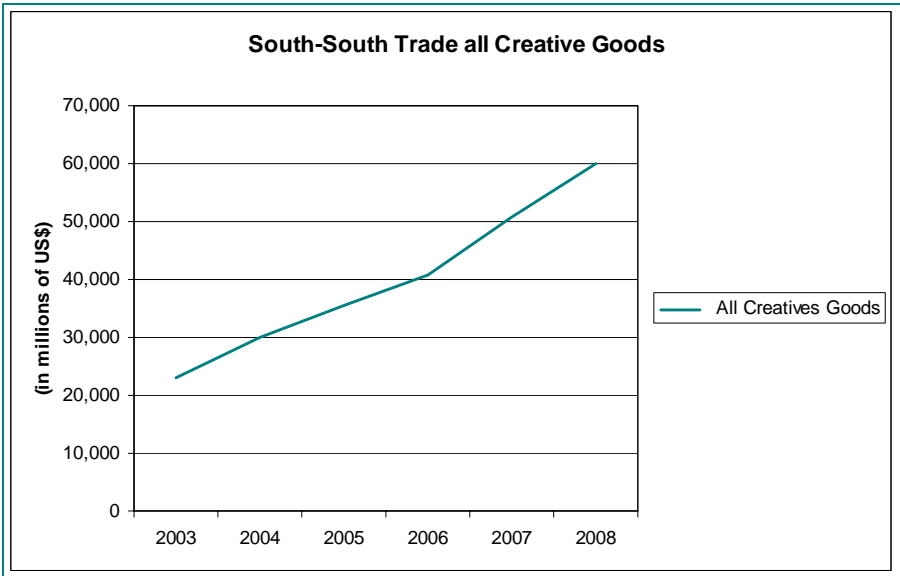
In recent years, UNCTAD trade analysis has provided evidence of new market opportunities in the South. The region's emerging trading and economic dynamism has created a new set of relationships among North and South economies, Between 2002 and 2008, the South's exports of all goods to the world rose from \$1.4 trillion dollars to \$6.1 trillion dollars. South export to the South, increased from \$828 billion to \$3 trillion during this period. Exports from South to South have increased faster than exports from South to North, revealing further opportunities for developing countries to engage in trading relationships with one another.

South-South trade of creative goods reached nearly \$60 billion in 2008, tripling in six years. This represents an astonishing rate of 20 per cent annually; while South exports to the North has been growing at an impressive, but relatively slower, annual rate of 10.5 per cent.

For developing countries, art crafts are the most important creative goods, accounting for 65 per cent of these countries' share in the world market for creative industries.

Zambia could benefit from the trade links it has with partners in the South such as Asia-Pacific, Latin America and the Caribbean and within Africa. It should also take advantage of the numerous cooperation agreements established while strengthening the creative sectors by tailoring policies to enhance their creative industries and the competitiveness of their products in regional and international markets.

**Chart 2. South-South Trade all Creative Goods, 2003-2008**



Source: UNCTAD Database on Creative Economy

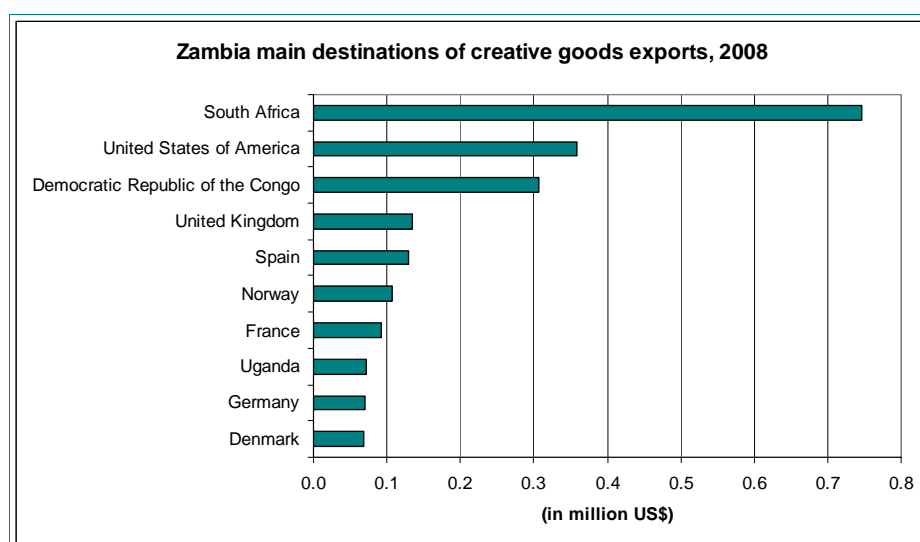


### 3.7.2 Regional and international cooperation

Africa has a long tradition of regional cooperation, its trade and monetary integration schemes being the oldest in the developing world. With the transformation of the Organization of African Unity into the African Union, and the launching of the New Partnership for Africa's Development (NEPAD) in 2001, the idea of a common monetary union has been revived. In terms of regional trade agreements, Zambia is a signatory both to the COMESA Free Trade Area, and to the SADC Trade Protocol whose goals were zero tariffs on 85 per cent of intraregional trade by 2008 and a customs union in 2010. Zambia appears to be a positive force within the SADC, and there is active cooperation, including in cultural spheres.

Zambia is a member of international bodies such as the African Union, the Commonwealth of Nations, the United Nations and the World Trade Organization. It has negotiated bilateral agreements with countries such as Belgium, Botswana, China, the Democratic Republic of the Congo, Egypt, Malawi, Mozambique, Namibia, Rwanda, Slovakia, Sudan, Ukraine, the United Republic of Tanzania, and Zimbabwe (some of these are still under negotiation)

**Chart 3: Zambia main destinations of creative goods exports, 2008**



Source: UNCTAD Database on Creative Economy

Zambia was a signatory to the Cotonou Agreement, which expired in 2007. Under the Cotonou tariff preferences, about 97 per cent of ACP exports used to enter the European Union free of duty. Moreover, as has already been mentioned, Zambia, as an LDC, is a beneficiary of the EU's Everything But Arms facility, and has been granted total duty-free quota-free access to the European market (i.e. to the 27 EU member countries).

At present, negotiations are under way to conclude a comprehensive regional economic partnership agreement (EPA) between the European Commission and the different regions of the ACP Group of States. An interim agreement between eastern and southern African States – including Zambia – was supposed to be concluded in 2008, but it is still under negotiation. During the first half of 2009 there

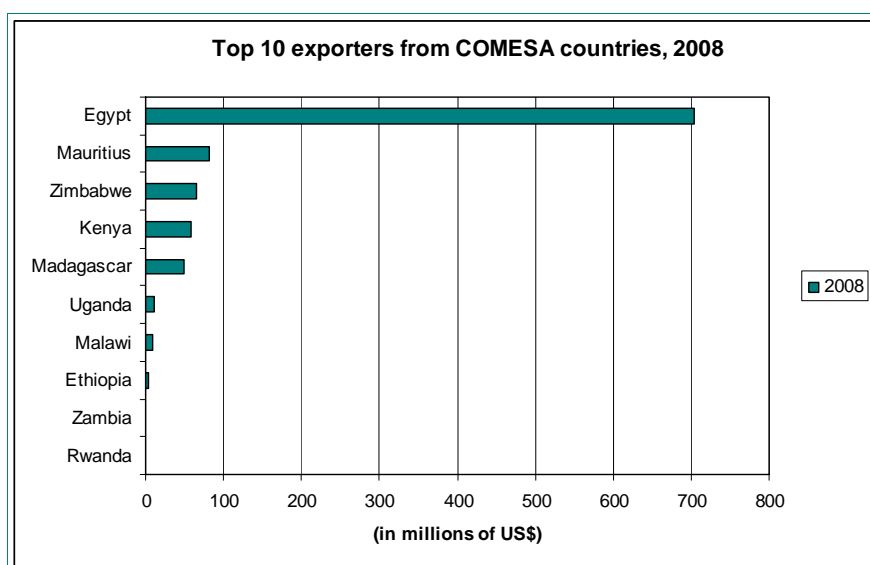
was a stalemate, resulting in serious discussion among SADC countries about the pros and cons of the EPAs.<sup>76</sup>

In this regard, it should be noted that an important precedent was reached in 2008 with the conclusion of negotiations on an EPA between the 27 members of the European Union and the 15 members of CARIFORUM,<sup>77</sup> with the inclusion of a protocol for cultural cooperation with special provisions for the cultural sector. This marked a breakthrough which aims to liberalize trade and investments in cultural goods and services between these two important markets. The EPA replaces and extends the coverage of the trade provisions of the Cotonou Agreement, which had governed the political dialogue between the European Union and the ACP Group of States since 2000, aiming at expediting the economic, cultural and social development of ACP States but with more focus on cooperation rather than on market access issues. For the first time, European countries granted market access to all entertainment services,<sup>78</sup> except audiovisuals. This had never been granted before.<sup>79</sup>

Zambia is also one of the qualifying countries under the African Growth and Opportunity Act passed by the United States.<sup>80</sup>

**Action:** As Zambia is a member of both SADC and COMESA, a political decision has to be made to choose only one customs union. The interim agreements are, by definition, only a first stage. Negotiations for a full regional EPA are ongoing. In the context of this project, UNCTAD can provide further policy advice on this matter, if required.

**Chart 4: Top 10 creative goods exporters from COMESA countries, 2008**



Source: UNCTAD Database on Creative Economy

<sup>76</sup> See: UNCTAD (2008). Regional cooperation and integration in sub-Saharan Africa. Discussion paper 189, by Martina Metzger.

<sup>77</sup> CARICOM member states plus the Dominican Republic.

<sup>78</sup> Entertainment services, as defined by the Central Product Classification (CPC) five-digit item codes.

<sup>79</sup> International Centre for Trade and Sustainable Development (2009). Expanding trade flows of cultural goods and services. Article by E. dos Santos-Duisenberg. Published in *Trade Negotiations Insights*. Issue 1, vol. 8. February.

<sup>80</sup> WTO (2002). Trade Policy Review: Zambia.

### 3.7.3 Export promotion

The Zambia Development Agency (ZDA) was established under the ZDA Act No. 11 2006, which came into effect in July 2006. It is a merger of the Zambia Privatization Agency, the Zambia Investment Centre, the Export Board of Zambia, the Zambia Export Processing Zones Authority and the Small Enterprises Development Board.<sup>81</sup> It is responsible for fostering economic growth and development in Zambia by promoting trade and investment based on an efficient, coordinated economic development strategy led by the private sector. The ZDA is meant to develop an internationally competitive Zambian economy through innovation that promotes a high level of skills, productive investment, and increased trade.

The role of the ZDA is to provide the following services on behalf of Government: (a) promotion of local and foreign investment; (b) provision of the business support necessary for the growth and development of SMEs; (c) promotion of exports and internationalism; (d) implementation of measures to improve efficiency in state-owned enterprises; (e) acting as a vehicle for consultations with the private sector, and recommending coherent trade and industry development strategies; (f) developing and facilitating multi-facility economic zones and industrial estates; and (g) providing assistance in securing services necessary for investment, such as land, immigration, registration and licenses.

The objectives of the ZDA are to: (a) increase the level and quality of direct investment in the Zambian economy and priority sectors; (b) increase the contribution of SMEs to the economy; (c) increase market access opportunities for the export of Zambian goods and services; (d) identify and promote the development of projects that are economically viable, in partnership with the private sector; (e) initiate and facilitate the establishment of competitive and sustainable industrial infrastructure in key economic sectors, with the overall objective of spearheading growth; (f) contribute to building skills, technology and infrastructure platforms from which enterprises can benefit; and (g) develop a clear policy and operational environment for state-owned enterprises, to ensure increased levels of operational efficiency and cost-effective service provision.<sup>82</sup>

In spite of the consolidation of different interests into the ZDA, it does not appear that the new ZDA Act, as yet, effectively facilitates the investment process or allows for incentives for small- and medium-scale investors.<sup>83</sup> All businesses engaging in trade are required to register with the Patents and Companies Registration Office. Exporters must complete an export declaration form, mainly for statistical purposes. Zambia has no export taxes, charges or levies.

**Action:** Government is encouraged to redress the weaknesses of the ZDA with respect to small-scale investors. Furthermore, the ZDA should envisage the creation of a specific programme to foster the expansion of creative industries.

**Action:** Encourage the development of a strategy for export development in which the creative sectors are taken into account.

Furthermore, opportunities exist for collaboration with the Aid for Trade initiative, whose aim is to strengthen the trade capacity of developing countries in order to allow better participation in and benefit from international trade. Aid for Trade is fundamentally about strengthening developing countries' productive capacities and tackling their supply-side constraints. A large part of Aid for Trade is aimed towards strengthening domestic production and internal trade, such as creating an enabling business environment for enterprises, or building economic infrastructure. Aid for Trade can be classified into five categories: (a) trade policy and regulations; (b) trade development; (c) economic infrastructure; (d) productive capacity; and (e) adjustment costs. During a workshop held in Zambia on December 2008 in collaboration with the Ministry for Foreign Affairs of Finland, a proposal was made to include issues related to culture, the creative industries and the "creative economy", as part of the

<sup>81</sup> <http://www.zda.org.zm/zda/default.aspx>

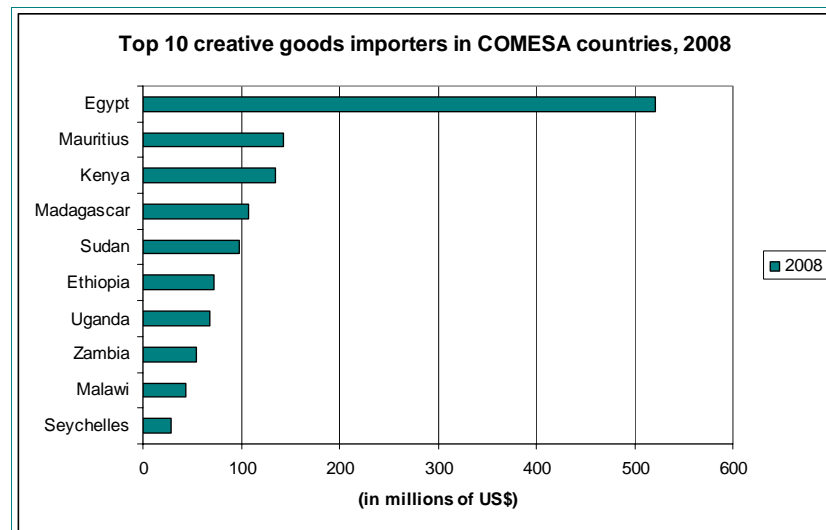
<sup>82</sup> <http://www.zda.org.zm/zda/default.aspx>

<sup>83</sup> UNCTAD (2006). *Investment Policy Review of Zambia*: 34.

Aid for Trade programme. The seminar served as an important step in the implementation of Finland's Aid for Trade Action Plan (2008–2011).<sup>84</sup>

**Action:** As a follow-up on Finland's proposal on Aid for Trade, UNCTAD is willing to support this process of providing trade/investment capacity-building activities for developing countries in the area of the creative economy, in the context of the Aid for Trade initiative.

**Chart 5: Top 10 creative goods importers in COMESA countries, 2008**



Source: UNCTAD Database on Creative Economy

### 3.8 SERVICES SECTOR

Services are of critical importance of most economies in the SADC region<sup>85</sup>. They provide the bulk of employment and income and are major contributors to GDP and trade. In 2006, the services sector contributed on average 50 per cent to the region's GDP. In Zambia, services make a large direct contribution to national income, thus the performance of this sector is vital for economic growth and poverty reduction. Currently, services account for nearly 64 percent of Zambia's GDP<sup>86</sup>.

In the area of communication services, which is crucial for the ICT related creative sectors, postal services are still a preserve of the Zambia Postal Services. The mobile sector has performed very well and has facilitated the participation of small and medium entrepreneurs, thus creating employment. The construction industry, which includes architecture an important creative sector, is currently the fastest growth sector in the world economy, with an average growth rate of 17.5 per cent per year for the last seven years<sup>87</sup>. The Government has committed itself to Vision 2030, in which it plans to construct more socio-economic infrastructure<sup>88</sup>. Regarding energy, Zambia is endowed with fuel, hydropower, coal and renewable energy sources. In line with Vision 2030, the government plans to

<sup>84</sup> Ministry for Foreign Affairs, Finland (2008). Aid for Trade seminar report. Lusaka, Zambia. December 9–10.

<sup>85</sup> Zambia is a member country of SADC.

<sup>86</sup> UNCTAD, Role of Services in SADC and negotiation approaches, pag.3. Towards SADC Services Liberation: Balancing Multiple Imperatives

<sup>87</sup> This is mainly attributed to the 10-year Road Sector Investment Programme costing 1.6 billion on Zambia's road network.

<sup>88</sup> Under the Highly Indebted Poor Countries Initiative (HIPC) almost all Zambia's foreign debt-amounting to about \$7.3 billion - has been written off. The attainment of HIPC means that the government has now more resources at its disposal to carry out socio-economic activities in the local economy.

increase access to electricity from 48 per cent to 90 per cent in urban areas and from 3.1 per cent to 60 per cent in rural areas. The financial services sector has so far provided services mainly to a limited number of individuals in the economy. The contribution to the GDP by the banking subsector is 33 per cent in the last three years and employs close to 5,000 individuals. By December 2005, there were 14 listed and 12 quoted companies in the Lusaka Stock Exchange. Market capitalization as a percentage of GDP stood at 28.65 per cent of the overall economy.

Zambia has made commitments under the General Agreement on Trade in Services (GATS) only in the construction and tourism sectors.

In the case of trade in services, specific infrastructure such as telecommunications, finance, logistics or professional services but also adequate investment policies and trade-supportive regulations are needed for the development of intraregional trade<sup>89</sup>. Trade agreements per se are not sufficient to promote increased trade among the parties. Many other factors related to the supply and demand structure of members' economies play a crucial role. For the purpose of this study, two main services sector are highlighted, tourism and, construction including architecture and audiovisuals, since they are considered closely linked to the creative industries.

### 3.8.1 Tourism: inter-sectoral linkages

The sector is of strategic importance to almost all SADC countries considering its high contribution to GDP, trade, foreign currency receipts and employment. However, development in the tourism sector is constrained by lack of capacity and inefficiency in the supporting services sectors, such as telecommunications, finance and transport.<sup>90</sup> Tourism contributed 3.4 per cent to the GDP of the region and was directly responsible for 1.75 million jobs in 2006<sup>91</sup>.

The tourism industry directly and indirectly provides significant employment and income opportunities for Zambians. There is a multiplier effect that creates more jobs indirectly, as a result of spending by tourists on tourism-related products such as cultural activities and creative industries products. Given that many of the tourism resources are located in rural areas, the tourism sector, together with the creative industries, is pivotal in bringing about development in rural areas.

Zambia's attractiveness as a tourist destination relies primarily on its reputation for wildlife and natural scenery, and for rich natural and cultural heritage sites, including the world-famous Victoria Falls located within its borders. The Government is committed to diversification, which will be encouraged both in the wildlife sector and for other new areas such as culture and heritage, traditional ceremonies, domestic tourism, community-based tourism, ecotourism and recreation tourism.<sup>92</sup> The tourism industry is a powerful instrument for sustaining demand for creative industries.

**Actions:** To facilitate and foster the active participation of local creative entrepreneurs in the tourism value chain, so that they can play a full role in the development of the industry.

**Actions:** To encourage and support entrepreneurs in the creative industries to operate their businesses in a way that is mindful of the environment, and according to appropriate quality standards and ethics.

<sup>89</sup> UNCTAD (2009). Strengthening Regional Economic Integration for Africa's Development: Economic Development in Africa Report 2009. United Nations publication. New York and Geneva.

<sup>90</sup> Towards SADC Services Liberation: Balancing Multiple Imperatives, Tourism Sector, pag.66. UNCTAD, 2010.

<sup>91</sup> Mfune F (2008). Tourism Development in Southern Africa. The Official SADC Trade, Industry and Investment Review 2007/08, SADC.

<sup>92</sup> Ministry of Tourism. Tourism policy of Zambia.

**Actions:** To support an organizational scheme for creative entrepreneurs to organize their activities in the framework of cooperatives or professional associations, in order to empower their negotiating position when offering their services to hotels and tourists.

The Ministry of Tourism recognizes the need to work in closer collaboration with the Department of Culture and Social Affairs in order to achieve more articulated actions, in particular with regard to the marketing strategies of cultural villages, and the selling of visual arts, crafts, souvenirs, jewellery etc.<sup>93</sup> The support of the Ministry of Tourism is also vital to assisting performing artists (e.g. dance groups, musicians, singers) to better negotiate their contractual arrangements with big hotels.

**Action:** Encourage and facilitate the setting up of private and public partnerships between tourism and creative industry stakeholders.

### 3.8.2 Audiovisual Services

The audiovisual sector is of particular interest to developing countries because it generates jobs and it also is a vehicle of expression of cultural identities. Therefore, countries feel compelled to protect the audiovisual sector and are reluctant to conduct negotiations or take on specific liberalization commitments within the framework of the WTO. This trend is reflected at the regional level within SADC, as audiovisual services have not been addressed in the SADC Protocol on Transport, Communications and Meteorology.

Even where commitments are made, it is mostly in motion picture projection services and motion picture and videotape production and distribution services. Licenses have to be acquired in order to provide audiovisual services. In Zambia, the new entrant does not have to prove that majority ownership is domestic, nor does it have to meet any minimum capital requirements<sup>94</sup>.

## 3.9 TECHNOLOGY AND CONNECTIVITY

Technology and innovation – as well as knowledge and skills transfer – are the long-term drivers of economic growth. For the creative industries, connectivity and ICT tools have two important roles: (a) as creative products themselves, due to their use and application to create products such as video clips, video games, animations etc.; and (b) as an enabling tool for the marketing and distribution of other creative products, such as music, film, advertising, e-books etc.

For developing countries, these innovations provide new opportunities to facilitate networks and to increase the exchange of information both locally and globally. Moreover, in recent years, the cost of access to ICTs has been considerably reduced, which has allowed a democratization of ICT use by poorer people to support their livelihoods, and has also facilitated the adoption of ICT in poverty-reduction programmes.<sup>95</sup>

The Ministry of Information and Broadcasting Services has the responsibility for ICT policy in the country.<sup>96</sup> The Zambian national ICT policy was launched in March 2007. There seems to be both political will and a clear understanding of the importance of bridging the digital divide and promoting the use of ICT in Zambia.

**Action:** The ICT policy should be accompanied by an implementation strategy with a time frame and an allocation of human and budgetary resources. The ICT policy should also be applied to support the work of artists and those involved in the creative industries.

<sup>93</sup> Statement by a high-level official from the Ministry of Tourism at the UNCTAD High-Level Policy Dialogue on Creative Industries. Lusaka. July 2009.

<sup>94</sup> Towards SADC Services Liberalization: Balancing Multiple Imperatives. Audiovisual services, pag 48, UNCTAD, 2010.

<sup>95</sup> See: UNCTAD (2007). *Information Economy Report 2007–2008*.

<sup>96</sup> <http://www.mibs.gov.zm>



**Action:** ICT requires skills, education and continuous training, and an effective mechanism should be put in place to ensure this process. UNESCO is proposing the creation of a cybercafé in Zambia, as a tool to support concrete actions and capacity-building in this area, during the implementation of this project.

The Zambia Electricity Supply Corporation (ZESCO) and the Zambia Telecommunications Company (ZAMTEL) are working to build the fiber-optic “backbone” of the country. However, at present, the costs of computers, telecommunications equipment, the taxation of ICT equipment, and commercial rates for internet access are prohibitive.<sup>97</sup>

**Action:** In order to encourage the production of local content, clear actions are needed from the Government in order to support the use of the Internet. Taxation on ICT equipment and services could be reduced, and lower licensing costs could be implemented.

The use of mobile phones in Africa is expanding at an extraordinary rate and shows no signs of slowing down, according to a recent special report on telecommunications in Africa.<sup>98</sup> There are more mobile phones in use than fixed lines. Just as internet use is increasingly being combined with telephony in developed countries, it seems reasonable to assume that internet access through telephones may have a future in Africa. Today, mobile phones have become the main tool for the circulation of creative sounds, texts and images, particularly among young people. However, for the time being, radio remains the prime source of information for the majority of the Zambian population.

In Zambia, the number of mobile phone subscribers increased from 735,000 in 2005 to 949,600 in 2006, showing a 29 per cent growth rate.<sup>99</sup> Internet connectivity is very low in Zambia, and is concentrated in urban areas and to some extent along the railway line that traverses Zambia. It is estimated that there are about 500,000 internet users in the country, and about 16,500 internet subscribers from the 10 internet service providers that the country has.<sup>100</sup> Even though at this point in time internet access in Zambia may not be very significant, it is likely to grow rapidly, and therefore the creation of local content is strategically important.

**Action:** In terms of medium-term strategies, it is clear that local creative content for the internet that is of interest to Zambians and Africans should be a priority. Digital content and new media therefore have a potential market, with the growing number of users. The linkages between ICT tools and the development of creative content are becoming more and more apparent, particularly for film, audiovisual and new media creations.

**Action:** Continuous learning in the field of ICT is essential. Special programmes could be envisaged, involving the Ministry of Information and Broadcasting, the Ministry of Education and the Ministry of Science with the university and with other educational centres, to ensure training and capacity-building in this essential field.

### 3.10 EDUCATION AND TRAINING

There are three institutions that undertake some teaching in the arts sectors in Zambia. The University of Zambia has courses in drama and film within their Literature and Languages Department and Mass Communications Department. However, according to practitioners in the arts and the creative

<sup>97</sup> Ngombe T. Zambia still lagging in local content production. <http://www.icconnect-online.org/Documents/ZambiaLocalContent2007ICT4DiConnectEng.pdf>

<sup>98</sup> Ford N (2008). Telecoms in Africa – moving to the next stage. *African Business*. 345: 34. August/September.

<sup>99</sup> The UNCTAD calculations are based on the ITU World Telecommunication/ICT Indicators Database, 2007. Statistical annex, table 1.11: Mobile phone subscribers: economies by level of development and region. *Information Economy Report 2007–2008*.

<sup>100</sup> Ngombe T. Zambia still lagging in local content production. <http://www.icconnect-online.org/Documents/ZambiaLocalContent2007ICT4DiConnectEng.pdf>

industries, the courses are not ideal for professionals who really want to work exclusively in these sectors. In 1983, the University of Zambia established a Centre for the Arts; however it was closed in accordance with the 1994–1998 Strategic Plan.

The Evelyn Hone College of Applied Arts and Commerce is based in Lusaka. The college offers education and professional training in various disciplines, including, among others, business and management, information technology and communications, art and music, and communication skills. The Media Studies Department offers courses in journalism and print technology. The Education Department has courses that lead to art teacher and music teacher diplomas. Under normal circumstances, the college also offers art and music diplomas and a certificate in fashion and design; however, these departments have not always been operational.<sup>101</sup> According to stakeholders, one of the big drawbacks is that there is no location in Zambia where graduates who have obtained teaching diplomas in the arts can actually teach.

There is currently a project proposal to support a new Department at Evelyn Hone College for the establishment and development of a Creative Media Academy, a Projects Bureau and a Centre for Living Culture. In the Creative Media Academy, bachelor curricula will be developed aimed at providing the creative industries with competent, creative and innovative professionals. The regional Creative Media Academy will feed upon the Butala Project<sup>102</sup>. The Projects Bureau will facilitate the liaison with the industries. It will manage core activities relevant to the relationship between education and the professional working field. The Bureau will cater for educational project assignments, industrial placement and improved linkages between the College and the creative industries. The Centre for Living Culture will stimulate local content creation and production and it will develop and maintain digital on-line database of cultural material for reuse. This proposal<sup>103</sup> is a joint effort by the Utrecht School of Arts, Evelyn Hone College, UNCTAD and the Department of Cultural Affairs of the Ministry of Community Development and Social Services of Zambia. This project is currently under the consideration of the Government of the Netherlands to receive support for its implementation. The purpose is to develop bachelor degrees in Media Design and in Music Design. This project is aimed at giving a boost to the development of the private sector in the creative industries in Zambia; with the entrepreneurial orientation of the Creative Media bachelor, their competence-based and project-based curricula, the interdependent operation of a Projects Bureau to liaise with the industries and of a Centre promoting local content creation and production while both Bureau and Centre will train entrepreneurial and creative skills stakeholders. As is necessary when dealing with creative industries, the plan does not only cater for the economical, entrepreneurial side but also for the relation between entrepreneurship and creativity and for local content creation.

**Action:** Supporting university-level programmes in the arts and creative sectors is crucial for strengthening the creative industries in the country. The Evelyn Hone College can play an important role in terms of continuing education and acquiring additional skills, including management skills, in the arts and creative sectors. Arts and culture education should also be integrated into the public school curriculum at all levels. Efforts should also be made to reopen the University of Zambia's School of Arts.

**Action:** UNCTAD and the Zambia government should enhance its collaboration with the Utrecht School of Arts in order to provide greater support to the Project Proposal on Supporting the

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<sup>101</sup> <http://www.evelynhone.edu.zm>

<sup>102</sup> The Butala project is a co-operation between the Serenje District Commission and the Creative Design Research Group of Utrecht School of the Arts led by Prof. Jan IJzermans. In this project farmers are trained to make local digital media and music products and learn how to earn money with these products. Until now the project has trained two pairs and a composer/sound designer and coached them in the making of some forty products. Local distribution possibilities have been studied and have led to a distribution plan that will come into effect this year.

<sup>103</sup> Project Proposal on Supporting the Establishment and Development of a Creative Media Academy, a Projects Bureau and a Centre for Living Culture. Utrecht School of Arts, Professor Marjanne Paardekooper, 23 April, 2010.

Establishment and Development of a Creative Media Academy, A projects Bureau and a Centre for Living Culture.

**Action:** In the context of this project, several education and training activities have been envisaged. UNCTAD is committed to provide capacity-building in trade policies and investment promotion, in order to assist the Government with policy formulation and to enhance the creative economy. ILO has been providing training in cultural and creative entrepreneurship to develop business skills for artists and creators. UNESCO is likely to focus on specific vocational training to upgrade artists' and creators' knowledge in the areas of their competence.

The Zambian Open University is currently in the process of establishing a School of Media, Performing and Fine Arts. This would be the first school in the country to offer degree programmes (bachelor's and masters) in media, performing and fine arts.<sup>104</sup>

Discussions with stakeholders have indicated that there are various needs in the domain of education and training. These can be broken down as follows: (a) arts education from primary level to university level; (b) capacity-building in terms of vocational training for artists who would like to improve their trade business skills; (c) capacity-building in terms of entrepreneurial skills; and (d) capacity-building in terms of institution-building, policy development and implementation.

### 3.11 CREATIVITY AND BIODIVERSITY

Developing countries are often endowed with rich biodiversity but they face the big challenge of finding the right balance between the sustainable use and the conservation of their biodiversity. In recent years, a positive trend towards ethical consumerism and eco-ethical fashion is emerging. Both consumers and producers of creative products increasingly question the true cultural and environmental value of what they create, buy and sell.

**Figure 10. Contemporary sculpture made with recyclable materials  
(Unknown artist)**



**Photo by Edna dos Santos**

The fashion industry, for instance, can play an increasingly important role in preserving natural heritage, encouraging sustainable consumption patterns and shaping a new consumer culture. The fashion industry provides an opportunity for developing countries to shift up economic ladder by using their creative talents in harmony with the best use of the nature, including the use of natural fibers and

<sup>104</sup> Dickson M (2008). The Zambian Open University: Proposal for a school of media, performing and fine arts studies. Executive summary. Stakeholders' meeting held in Lusaka.

environmentally-friendly processes. Many businesses are embracing innovative approaches in dealing with global supply chains, worker's rights and environmental issues.

**Action:** Responsible business initiatives are needed by both SMEs and multinational companies. It is important to use processes that consume less water and energy to avoid the abusive use of animal species for the use of skins.

**Action:** Efforts should be made to promote the use of biodegradable, the use of organic products, natural fibres and use of local material. The use of pesticides and insecticides should be avoided as well as chemical processes that harm the fauna and flora.

Creative industry products are not only cultural ambassadors; every product represents a specific attitude towards our planet and environment. Artists and cultural operators have a chance to play a role by promoting products as a vehicle for social, cultural, and economic transformation. The main challenge remains in bridging awareness between designers and product managers, producers and co-producers, consumers and citizens. Each one has a part of responsibility in preserving the environment and biodiversity. The eco-ethical fashion and natural cosmetics are booming sectors which contribute to employment creation and export revenues providing jobs and export revenue from the sustainable use of biodiversity.

**Action:** A constructive dialogue is needed to engage business and consumers to come together with the aim to conserve biodiversity. Throughout supply chains, partnerships among farmers, NGOs, and government are needed at a global scale.

### 3.12 DATA COLLECTION

The necessity of reliable statistics is an ever-present issue in all discussions about the creative industries. It is almost redundant to say that effective and reliable data collection is an imperative for any type of assessment and policy formulation. The importance of data collection to support the development of the creative industries cannot be overstated, as emphasized by UNCTAD in the *Creative Economy Reports of 2008 and 2010*.<sup>105</sup>

Zambia has a Central Statistical Office (CSO).<sup>106</sup> The main mission of the CSO is to provide a comprehensive national statistical database, with relevant statistical information for the Government, the private sector, and the wider national and international community. The CSO is also responsible for promoting the increased use of statistical information for effective decision-making and informed debate on the economy by all major stakeholders. Its headquarters is in Lusaka, and it has offices in all the nine provincial capitals of Zambia, and in selected districts within each province. The provincial offices are mainly responsible for data collection, editing and data entry.

ZambiaInfo is a national database to monitor the implementation of the Fifth National Development Plan 2006–2010 and the United Nations Development Assistance Framework (UNDAF) 2007–2010. ZambiaInfo also incorporates the Millennium Development Goals. There is a task force for ZambiaInfo that is comprised of several relevant United Nations agencies.

Based on official sources, UNCTAD has compiled statistics from Zambia on trade in creative goods; these are presented in several charts, and in the statistical annex at the end of this report. Nevertheless, this first attempt at analyzing the export performance of the creative industries in Zambia should be viewed cautiously.

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<sup>105</sup> UNCTAD and UNDP (2008). *Creative Economy Report 2008. The challenge of assessing the creative economy: towards informed policymaking*. UNCTAD/DITC/2008/2.

<sup>106</sup> <http://www.zamstats.gov.zm>

Within the strategic plan of the MCDSS, objective 2 specifically emphasizes the necessity of developing a database and improving the dissemination of information in the cultural sector. The mapping of the creative sector is a costly and time-consuming exercise that should be done gradually, but it is important to start the process.

**Action:** The Department of Cultural Affairs, the National Arts Council and the Central Statistical Office could benefit from a consolidation of forces in terms of collecting statistics and information on the creative sectors.

**Action:** Efforts should be made to improve the quality and coverage of data related to the creative industries, not only on trade, but also for some important economic and social indicators.

**Action:** Priorities need to be identified regarding the data to be collected – both quantitative and qualitative. At this stage, there is insufficient reliable data that could be relevant to policymaking and to an effective assessment of the domestic and international market for Zambian creative goods and services. As the central organizing entity, the CSO could expand its coverage and include data collection for the creative industries, on its regular work.

## PART 4. SECTOR-SPECIFIC OVERVIEW

As mentioned in the introduction, the ACP/ILO/UNCTAD/UNESCO project initially pointed out three possible sectors for action: (a) performing arts; (b) audiovisual and new media; and (c) books and publishing. The extent to which these pre-identified sectors become the focus of the project's activities depends on the results of phase I and the identification of needs and priorities. They must be consistent with the aim of providing optimal possibilities of enhancing the creative industries in the country in the short, medium and long term.

This section looks at the current situation in three pre-designated sectors, and provides comments on additional sectors considered to be of relevance to the creative industries in Zambia. It is notable, however, that some export potential seems to be in the art crafts, visual arts and publishing sectors, according to official figures. The potential of the audiovisual, new media, design and music should not be overlooked and deserve greater attention.

Based on official sources, UNCTAD has compiled statistics from Zambia on trade in creative goods; these are presented in several charts and in the statistical annex at the end of the report. However, as mentioned earlier, these figures should be checked and improved as data inconsistencies were observed. Special attention should be given to data collection and reporting.

### 4.1 PERFORMING ARTS

Traditional dance performance is a vital part of Zambian cultural heritage. Numerous traditional ceremonies are performed throughout the country, and each ceremony has its own corresponding dances. Traditional dance troupes are called upon to perform at many official government events, and at private venues such as hotels and restaurants, which also hire dance troupes to perform. The Government also sponsors a national dance troupe which performs at official events.

Nonetheless, in spite of the central role that these performances play in Zambian society, performers find it difficult to make a living from their profession, according to ZAFODAMUS and other local stakeholders. For a start, the creative disciplines are not taken seriously enough, and are not considered as being – or potentially being – a real profession. Gender issues are a concern, and this is apparently reflected in pay scales; musicians and managers are often men, and women are generally dancers in the troupes and earn less. They receive little or no recognition for their work, either in monetary or in social terms. The manager of the group usually negotiates the price and then distributes the money after the performance. There is little job security, in that the performers are only paid if there is a request for their work. There is no social security system for the performers, nor are there any pension schemes.

#### Figure 11. Traditional dance



Launching of the project, Lusaka, July, 2001  
Photo by Edna dos Santos



**Action:** Reinforce the importance of artistic work and creation, by means of a creative industries awareness campaign. It should be borne in mind, however, that the performing arts are only one sector of the creative industries, and that a creative industries campaign should be broad and all-encompassing.

**Action:** Legislation is recommended covering performers' rights. As has already been mentioned, social security and pension systems need to include performers from the creative economy.

**Action:** Given the talent that exists in the dance sector, one might consider enhancing the training and education possibilities available, for example by creating a school of the performing arts, or by reinforcing existing structures such as the Evelyn Hone College. This could help in professionalizing those working in the sector, and it could also serve as a catalyst for developing new dance languages.

#### 4.1.1 Cultural villages

Zambia is working to develop an infrastructure of cultural villages. These are locations that bring together a range of different elements from traditional cultural practices, generally including the performing arts, crafts, and souvenir making. The Ministry of Tourism and the Ministry of the Environment and Natural Resources are also supportive of the policy to develop cultural villages in the country.

The cultural villages take different forms. In Lusaka, for example, there is the Kabwata cultural village, where approximately 12 artists and their families (60 people) live and work, making wood sculptures, baskets, and various other crafts and souvenirs. The village also includes a performance space used for traditional dances (this venue is currently undergoing renovation). Workers in the village return 15 per cent of their sales to the village association. While there is some mutual solidarity among the members of the village, it was noted that when there are no sales there, the workers do not receive any support from the village. Many tourists to Lusaka visit this cultural village and purchase crafts and souvenirs. The traditional dances (which were performed in the village before renovations began) were frequently attended by both locals and tourists.<sup>107</sup>

The MCDSS and the DCA are actively working to develop a network of cultural villages throughout the country. The plan is to have one village serve as a type of training centre, which the other villages could use as a resource base.<sup>108</sup>

#### Figure 12. Kabwata cultural village

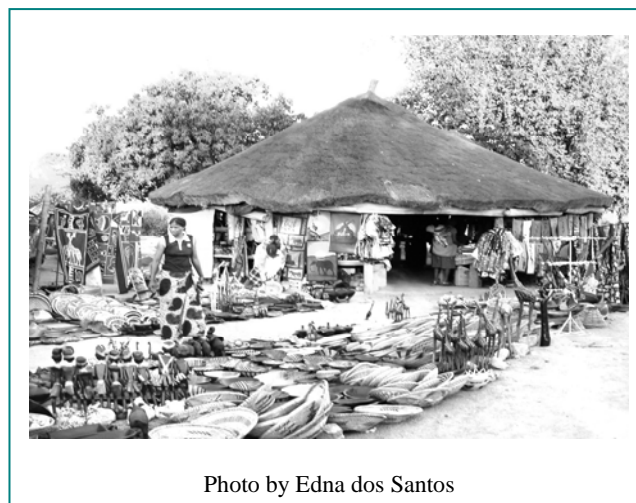


Photo by Edna dos Santos

<sup>107</sup> Discussions with members of the Kabwata cultural village. Lusaka. 28 July 2008.

<sup>108</sup> Minister of Community Development and Social Services. Lusaka. 28 July 2008.

An ambitious project is currently being undertaken in Livingstone to construct the Maramba cultural village. This is a cooperative project between the MCDSS, the Ministry of Tourism, the Ministry of the Environment, the Ministry of Commerce, Trade and Industry, and the South African chain of Sun Hotels. The Maramba cultural village will house 19 members of the national dance troupe, who will live in the village in accordance with traditional ways. There will be regular dance performances in the village. Small shops/stands are part of the village construction, so that crafts and souvenirs can be sold, in addition to traditional food and traditionally prepared beverages.

This is an interesting public–private partnership initiative, which is modeled on the South African example. The village association will receive 10–25 per cent of all the sales; the national dance troupe will pay rent at preferential rates. The Sun Hotel and the MCDSS and DCA will be responsible for the maintenance of the village. The Zambian Government has been careful to avoid too much dominance by the Sun Hotel over Maramba village, and to encourage varied ownership of enterprises in the new village. There is also a clear objective of applying quality control to the products that are sold there, and to implement and integrate high quality and traditional standards.<sup>109</sup>

**Action:** These villages fit within the defined tourism policy. They are complementary to the development of trade in the creative industries, and synergies should be developed in this sense. For example, the quality of art crafts is crucial and can perhaps lead to high-quality art crafts boutiques, which can be venues for attracting investment and export interest.

**Action:** The notion of clusters could be applied and developed to improve the functioning and efficiency of the cultural villages. Either through the creation of specialized locations throughout the country which supply the villages and/or the indigenous cultural communities with the inputs need for their creative products, and also as a specialized centre for sharing knowledge and information, improving productivity, providing training and motivating artisans to work more efficiently while preserving the traditional techniques and transferring traditional knowledge to the new generations as way of promoting and preserving cultural diversity and heritage values.

## 4.2 MUSIC

In terms of the contemporary music sector, in Zambia, as in most of the countries in the southern African region, the local market is dominated by South Africa. While there is a vibrant music culture that permeates Zambian society, the contemporary music scene seems to suffer from considerable constraints linked to technical know-how, and to a serious lack of equipment and of quality facilities, which do not meet any minimum required standards.<sup>110</sup> This sector has paralleled the vagaries of the Zambian economy, with various records labels closing down during the economic downturn.

With funding from NORAD, the Zambia Association of Musicians has been quite active in terms of restructuring itself, trying to attain a level of professionalism, and negotiating with the Government to improve working conditions. The complications in terms of the rights and benefits of creative professionals are impediments to improving the current situation.

Traditional music seems to be mostly used for live performances at ceremonies, official events, and commercial venues such as hotels and restaurants. In this sense, considering its potential for development, the sector seems really to be at an early stage. Giving attention to the traditional music sector could certainly be beneficial, in the sense that it can provide both inspiration and possibilities for fusion in the contemporary music scene. One of the difficulties with the African music market is that there are already countries such as the Democratic Republic of the Congo, Senegal and South Africa which have comparatively strong music industries established in both African and international markets.

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<sup>109</sup> Livingstone cultural affairs officer. Southern province. 2 August 2008.

<sup>110</sup> Stakeholders' meeting. Lusaka. 29 July 2008.

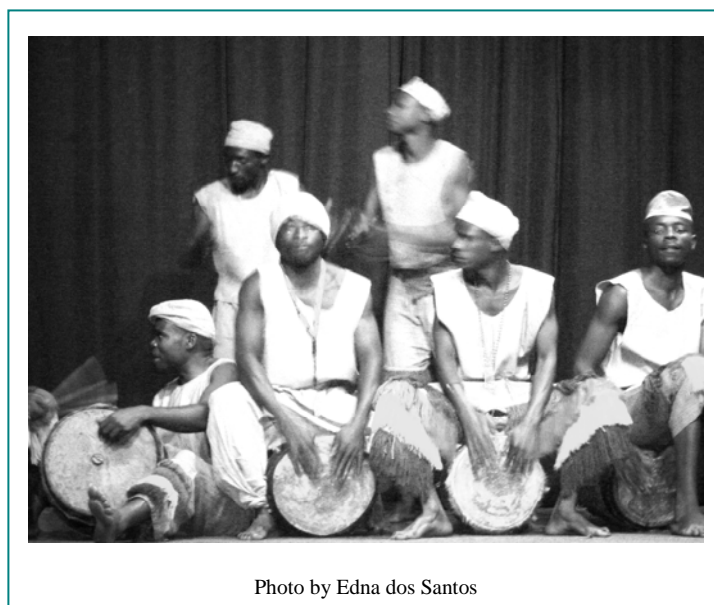
**Figure 13: Traditional music**

Photo by Edna dos Santos

**Actions:** Institution-building support and tailor-made capacity-building are essential. In particular, the ZAM could benefit from training in two areas: Firstly, to strengthen the organization so that it can work better to protect and promote the interests of musicians. For example, a ZAM website could help disseminate information about the musicians and their music. Secondly, the musicians themselves could benefit from capacity-building. Nowadays most musicians have no choice other than to produce their own works and to be their own agents. Training in entrepreneurial skills and intellectual property rights issues seems to be crucial. Thirdly, encourage the performance and recording of traditional music, building synergies between contemporary and traditional cultural expression through common vocational training capacity-building programmes.

### 4.3 AUDIOVISUAL AND NEW MEDIA

The Ministry of Information and Broadcasting Services has the responsibility for overseeing and implementing the information and media policy; the theatre and cinema policy; broadcasting and television services; dissemination and gathering of information; and issuing radio and television licenses, in addition to the ICT and copyright administration mentioned earlier.<sup>111</sup>

*Objective 1:* Provide a legal and policy framework, and monitor and evaluate its implementation, in order to guide the operations of the media industry and ensure compliance.<sup>112</sup>

The NAC has undertaken targeted actions to support activities in this sector by supporting the NAMA in various activities, such as providing financing to attend film festivals and training initiatives, encouraging the Government to establish legislation in the sector, and creating tax exemptions for materials and equipment. It has helped to bring together all those who are active in the sector to write and submit a proposal to the Ministry of Information and Broadcasting Services on a policy for the sector.<sup>113</sup> The NAC states clearly that the sector needs financial support in order to flourish.

<sup>111</sup> Republic of Zambia. Ministry of Information and Broadcasting Services. *Strategic Plan for the Ministry of Information and Broadcasting Services 2006–2010*: 3.

<sup>112</sup> Republic of Zambia. Ministry of Information and Broadcasting Services. *Strategic Plan for the Ministry of Information and Broadcasting Services 2006–2010*: 20.

<sup>113</sup> National Arts Council of Zambia. *The role of the National Arts Council of Zambia in the production of local films*: 4.

The Zambia National Broadcasting Corporation is the state broadcaster. There are a number of other broadcasters, including Copperbelt TV System (Ndola), the Central Broadcasting Corporation, and Trinity Broadcasting (religious, from the United States), as well as a private broadcaster, Muvi TV (Lusaka), which is extremely popular with the public. There are also three pay channels, namely Multichoice/DSTV (South African), MyTV (Zambian) and GTV (British).

According to the director of Muvi TV, there is an extreme lack of infrastructure in the country, with nowhere to buy equipment or materials, and a lack of clarity in terms of structuring the sector. For example, the process of obtaining licenses is extremely arduous and can take years. On a positive note, it is significant that one of the conditions for obtaining a license is that a quota of approximately 70 per cent of Zambian programming must be achieved. Nevertheless, in spite of the lack of facilities, Muvi TV has been producing local television series, and in July 2008, a film produced by Muvi TV was shown in cinemas in Lusaka.<sup>114</sup> Muvi TV has approximately 150 employees. There have been comments from the public, however, on the lack of quality of the production. Nonetheless, local initiatives, such as that of Muvi TV, are encouraging, and will likely lead to improvements in quality.

Yezi Arts Promotions and Productions is another local enterprise which is active in theatre, film and television. The director of the company also chairs Southern Africa Communications for Development (SACOD) for film. He has four employees. In addition to making his own digital film productions, he has also created a theatre festival in the country. In terms of developing the creative sectors in Zambia, Yezi points to the clear need to implement sustainable support programmes that have clearly defined implementation strategies.<sup>115</sup>

This sector could be considered as a medium- and long-term development sector, although Zambia does not have a film culture or history, compared to some of its neighboring countries. Nonetheless, there is an enormous desire for Zambian content at cinemas and on television. The audiovisual and media sector have great potential but need supporting policies. The Government of Zambia needs to be attentive in order to avoid missing the link to stimulate local content creation and production.

Currently, there are insufficient training and educational facilities, and it will take some time for the process of education, training, and then the development of an industry to take hold. Long-term possibilities exist, in terms of the growing need for creative content in all the media, as indicated in chapter 3. There is potential for development, both in terms of the national market and a targeted international market.

**Action:** Legislation for the film and audiovisual sector is encouraged. Follow-up on the suggestions that have already been submitted by the industry and the NAC; for example, the Zambia National Broadcasting Corporation could establish a quota for local or African content. This must also be accompanied by concrete investments in kind in the production of local films.

**Action:** Encourage local productions. The suggestions mentioned in section 3.1.2 on financing mechanisms can be tailored specifically to this sector. For example, funding mechanisms for the film and audiovisual sector should be established. Such a fund could largely be supplied from industry transfers within the film, audiovisual and media sectors themselves. Contributions could come, for example, from a percentage on broadcasters' overall advertising earnings, a tax on DVD sales, a tax on blank DVDs. A contribution could be considered from internet service providers or telephone companies that are or soon will be interested in providing creative content through their services.

**Action:** Government could consider creating a Zambian film commission to promote the country as a film location. This should be simultaneously accompanied by some conditions and controls on filming within the country so as to ensure that there is some return to the local film industry, either in terms of training, the use of local technical services and auxiliary staff as available, and/or in investments.

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<sup>114</sup> Discussion with Steve Nyirenda, Managing Director of Muvi TV. Lusaka. 1 August 2008.

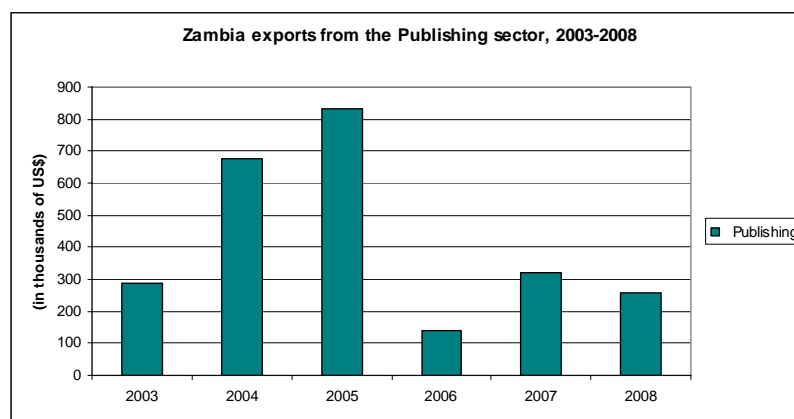
<sup>115</sup> Discussion with Abdon Yezi, Director of Yezi Arts Productions. Lusaka. 4 August 2008.

**Action:** Encourage the exposure of film professionals to neighboring-country and international festivals and film and audiovisual venues. Encourage cooperation with regional structures such as the Pan-African Film and Television Festival of Ouagadougou (FESPACO) to build networks within and across the film industry. Possibilities are to better integrate this project with the other component of the ACP Support Programme for the Cultural Industries. The ACP-EU Support Programme for the ACP Cinema and Audiovisual Sector Film is helping to support the development of the film and audiovisual industries in Africa.

#### 4.4 PUBLISHING AND THE BOOK SECTOR

The publishing market in Africa has structural problems, as in almost all countries. The high prices of imported inputs, such as ink, paper and machinery, are recurrent problems. Moreover, the oligopolistic structure of the market, which is comprised of a small number of large editorial groups based in Europe, means that most literary works by Africans are published and marketed by European companies. According to stakeholders, the publishing sector in Zambia is almost non-existent; principally, books are published on easy and commercially oriented subjects, with the main goal of earning a profit.<sup>116</sup>

**Chart 6. Zambian exports from the publishing sector, 2003-2008**



Source: UNCTAD Database on Creative Economy

A glance through bookshops in Lusaka indicates domination by a very limited number of foreign publishing firms, with quite a restricted range of publications. The chart below presents statistics on publishing and printed materials, such as books, magazines, newspapers, calendars, posters, postcards, greetings cards etc.

At present, there is no book policy in Zambia. A proposal for a specific policy for the book sector has been drafted and is under examination by the Government. It would be interesting for Zambia to look at measures taken by other countries, such as Mozambique, which has decided that a certain percentage of books should be published in Mozambique.

**Action:** Policies should be put in place to deal with the bottlenecks in the publishing and printing sector, particularly in the case of books for educational purposes. Efforts should be concentrated on promoting the works of local literary writers inside the country, since the sector apparently does not

<sup>116</sup> Stakeholders' meeting. Lusaka. 29 July 2008.

have great appeal for exports. Trade data shows a sharp decrease in the level of exports from the publishing sector in 2008 as compared to 2005, as shown in chart 6 above.<sup>117</sup>

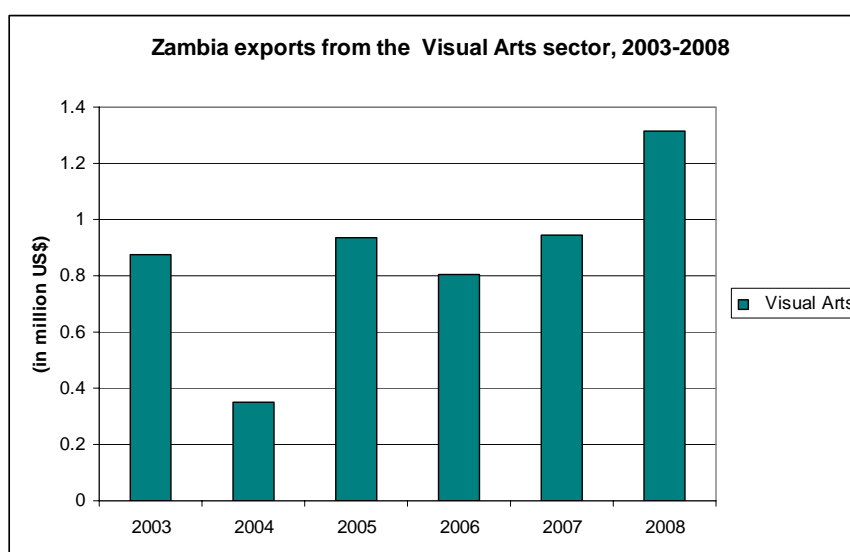
## 4.5 OTHER SECTORS WITH POTENTIAL

In addition to the sectors noted above, there is noteworthy potential for creative industries in other areas, such as the visual arts, art crafts, and some areas of design.

### 4.5.1 Visual arts

The visual arts sector in Zambia appears to have high potential for development in the medium term. As shown in Chart 7 below, the value of exports gradually increased in recent years.

**Chart 7: Zambia exports from the visual arts sector, 2003-2008**



Source: UNCTAD Database on Creative Economy

There are already a few internationally known painters, sculptors and plastic artists who circulate in international art venues. The target market for consumption in this domain is largely a higher-income, global, urban market – primarily external, but also upscale internal.

The increased global visibility in this area will also have a spillover effect on the crafts sector. The visual arts sector comprises antiques, paintings, sculpture and photography, as well as “other visual arts”, consisting of collages, engravings, carvings, lithographs and other ornaments, as per the classification used by UNCTAD for trade statistics.

**Action:** Specific funding opportunities should be developed for local artists, for example to support studio spaces. The current structure and facilities of the Visual Arts Council could be expanded to provide services as a cluster for the visual arts.

**Action:** The national art museum or a national art gallery could be a form of investment in local artists on a regular basis, by exhibiting their work. This would also be a form of exposure for local artists, and a means of investing in the local art industry. Art works of local artists could also be used for decoration and promotion in public buildings, hotels, national parks etc.

<sup>117</sup> UNCTAD hopes to establish closer contact with Zambia’s Central Statistical Office, with a view to checking the figures and improving the quality of the data on the export and import of creative goods and services.

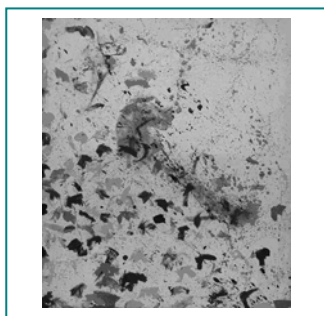


**Action:** The mobility of talented artists should be encouraged, through travel to international art biennales, particularly those in the cities of developing countries, such as Cairo, Dakar and Havana. Contacts with promoters of international auctions and fairs could also be fruitful.

**Action:** Assist the Visual Arts Council in creating an internet art gallery. Provide capacity-building in terms of managerial and entrepreneurial skills for the Visual Arts Council, which would transfer these skills to groups of artists – at least two sessions a year, based on the ILO model. Visual artists should also learn the fundamentals of intellectual property rights, in order to protect their works from illegal reproduction.

**Action:** Encourage tax exemptions for materials and supplies used in the visual arts sector

#### Figure 14. Paintings by Zambian artists



**Henry Tayali**

There are a number of private art galleries already established throughout the country. These range from galleries run privately by locally established entrepreneurs who invest in art, to smaller galleries owned and run by individuals. The Henry Tayali<sup>118</sup> gallery is a local venue and meeting point for many artists, as well as being the headquarters of the Visual Arts Council. It has received crucial support for its activities from NORAD.



**William Miko**

An interesting project has been initiated by William Miko, a local artist who also works as a curator, in conjunction with the Hotel Intercontinental. Miko rents part of the lobby at the hotel, and exhibits works by local artists. This is an optimal way of promoting Zambian art, on account of the international visitors who pass through the hotel. It is also through this kind of visibility that international investors can be found. Miko has also undertaken a project in cooperation with local corporations, to facilitate the exhibit of local Zambian art in their office buildings.

#### 4.5.2 Art crafts

Art crafts are the only sector of the creative industries where developing countries have a strong participation in world markets. Exports from developing countries increased from \$9.2 billion in 2002 to \$20.7 billion in 2008<sup>119</sup>. This is not a negligible market, but regrettably, it is usually disregarded and disconnected from public policies. Art crafts are not only vectors for jobs and export earnings, but also a tool for poverty reduction, the transfer of community-based skills, and cultural diversity.<sup>120</sup>

<sup>118</sup> Henry Tayali played a very influential role in the cultural and artistic development of Zambia.

<sup>119</sup> Creative Economy Report 2010: The Creative Economy: A feasible development option. UNCTAD and UNDP, 2010.

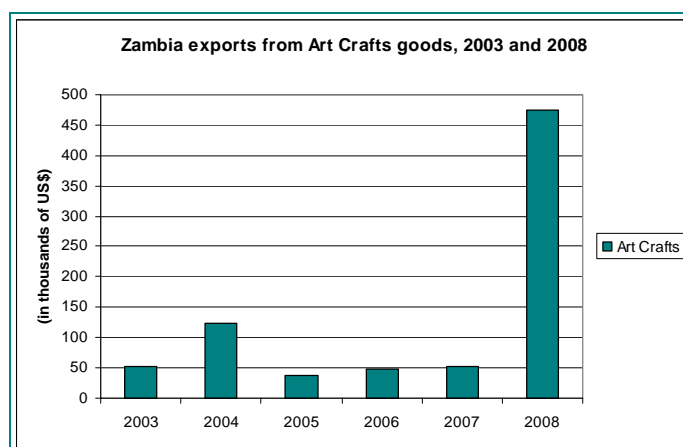
<sup>120</sup> See: *Creative Economy Report 2008*: 114–117.

**Figure 14: Art Crafts from Cultural Villages**

Art crafts have distinctive features; they can be utilitarian, aesthetic, creative, decorative, functional, traditional, religiously symbolic, socially symbolic etc. As the art crafts creative sector is very broad, UNCTAD has subdivided it into six main categories: (a) carpets; (b) celebration articles; (c) paperware works; (d) wickerware articles; (e) yarn items; and (f) other miscellaneous crafts. These are the indicative products covered in chart 8.

In Lusaka, and throughout the country particularly in the Livingstone area, there are crafts markets, villages, stands and vendors to be found. The crafts sector in Zambia has potential for growth, both in the domestic and the export market, despite the fierce competition in this domain inside the African continent. The development of this sector can go hand in hand with the development of the cultural villages which is already established in government policies. However, there are challenges to be addressed.

A key issue is the question of quality and standards, which must be addressed for the art crafts work to be more competitive in domestically and internationally. In addition, various products that are specifically identifiable as Zambian should be clearly designated, with labels indicating the origin and the name of the community that produces it.

**Chart 8: Zambia exports from the Arts Crafts goods, 2003-2008**

In certain cases, even a small sentence explaining the indigenous heritage and the number of hours spent to produce the craft would bring value-added to the product. Handmade crafts could be signed by the artist/artisan who created the piece. This would not only encourage the artist to improve the artistic quality of the product, but it would also promote his/her name as a brand. For the tourists, this

would mean higher standards of quality, which would qualify for higher prices. This process would also help to raise interest in and respect for the cultural heritage of the country, bringing greater recognition to the work of its artisans.

As far as the process of selling crafts is concerned, the items are generally laid out on the ground or a table, creating a mass of products for which no distinction is made with regard to quality of work. In addition, there tends to be a significant repetition of the products available. Efforts should be made to improve the display of works; fewer pieces may mean more exclusivity and therefore higher prices.

The fast expansion of exports of art crafts from Zambia over the last years is noticeable. According to the chart 8 and the statistics presented in the annex to this study, exports of crafts increased strongly from a level of less than \$40,000 in 2005 to \$475,000 in 2008, nearly ten times more in three years. This is evidence that the global crafts market is growing. This creative sector should not be neglected although the figures remain low compared to other sectors.

**Action:** An expert on market strategy could be hired by the National Arts Council to prepare and implement an export promotion strategy for art crafts, taking advantage of duty-free arrangements in major markets. This professional would provide technical advice and quality control, and would monitor the displaying of art crafts offered at the cultural villages.

**Action:** Encourage capacity-building in terms of technical skills training, in order for crafts workers to improve the quality of the products.

**Action:** Encourage capacity-building in terms of entrepreneurial training, managerial skills and marketing skills for people selling crafts.

In this regard, a meeting was held by the National Handicrafts Association in September 2009, attended by a number of stakeholders, including the Government, United Nations agencies, the National Arts Council and the World Bank, with a view to discussing how the Association could be supported by the European Union's capacity-building programmes. As result, the European Commission committed to fund certain programmes falling within its conditions for the National Handicrafts Association. It was pointed out, however, that these programmes should be harmonized with the actions under way as part of the UNCTAD/ILO/UNESCO Creative Industries Project. In addition, the Finnish Government agreed to fund entrepreneurship training for the Association, beginning with one training in each province. This training will provide artists – particularly members of the National Handicrafts Association – with entrepreneurship skills, using the ILO manuals on how to start and run an artistic business. The plan is to ensure that more than 200 artists benefit from this support, across all nine provinces. They will use the trainers already trained under the ILO component of this project.

### 4.5.3 Design

As mentioned in section 3.5, with regard to investment and trade opportunities for potential sectors in the future, the Government may wish to look into some design products and put in place some policies to enhance creative capacities and stimulate selected export-led sectors, particularly to take advantage of duty-free quota-free preferences in major markets. Special attention could be given to: (a) jewellery, in connection with the existence of gemstones, silver, gold and other metals in the country; (b) innovative ethnic textile design, garments making use of natural cotton, and promoting an environmentally and socially friendly brand; and (c) furniture, using local metalworking and a mix of contemporary and traditional African design. In order for such products to be competitive, they would have to combine elements of uniqueness and functionality, even if they are to be produced on an industrial scale.

### Chart 9: Zambia exports from the design sector, 2003-2008



*Source: UNCTAD Global database on creative economy*

**Figure 15. Modern and traditional design chairs**

**(Unknown artist)**



Photos by Edna dos Santos, 2009

**Action:** A pre-feasibility study could be commissioned from the university and the Chamber of Commerce to analyze the economic prospect of these sectors in terms of productive capacity, the investments required, and a market strategy. The study should analyze potential demand, and supply and trade aspects, taking into account the situation of the existing enterprises active in creation and production of interior design products.

## PART 5. CONCLUSIONS

Recommendations for actions to be taken are indicated throughout this entire document, and are thus integrated into the analysis. Instead of reiterating all these points, the conclusions below are of a more general nature. The first part of this section summarizes the main results of the meetings with stakeholders and relevant government ministries. The second part notes the areas in the creative sectors that have high potential for growth. Finally, some concluding remarks are made and a Plan of Action proposed as a tool for the formulation of a comprehensive creative industries policy.

### 5.1 RESULTS OF MEETINGS WITH THE GOVERNMENT AND STAKEHOLDERS

The results of the meetings with stakeholders and with relevant government ministries made it clear that there is a strong consensus on the priority issues that need to be addressed during the implementation of this project, to ensure that the measures taken will have sustainability in the future.

The main results from stakeholder meetings were:

- (a) The need for institution-building;
- (b) The need for capacity-building for professional and entrepreneurial skills;
- (c) The need for financing structures and a framework for investment.

The main results from the government-level meetings were:

- (a) The need to reinforce policy procedures and adoption;
- (b) The need to implement the policies through regulations and strategies;
- (c) The need for inter-ministerial policy actions and communication;
- (d) The need for capacity-building for policymaking.

There are two broad consensus issues which cut across both groups:

- (a) Reinforcing institutional capacities; and
- (b) Capacity-building in general.

### 5.2 SECTOR EVALUATION

A differentiation can be made between the sectors that have good development potential for the national market, and those that are more suitable for export. Another differentiation can be made in terms of the markets targeted; for example, mass-produced creative products for popular consumption versus products with better quality standards, labeling and packaging that are more suitable for high-income international customers. A further differentiation can be made in terms of short, medium and long-term goals.

Two groups in the creative sector stand out as having a high level of development potential. The first is actually a multi-sector strategy that links the visual arts, crafts and publishing. Work on developing each of these sectors can function as a process that benefits all of them. This combination approach is a response to the short- medium- and long-term strategies to enhance the creative industries for development gains. The second group with good development potential is design. Zambia has two

types of natural resources that could be complemented through design skills. First, the country has gemstones, which can be used for making jewelry. Discussions with the Ministry of Science have revealed that it has instituted some programmes in jewelry creation in the Copperbelt region. In the same way, the tradition of metalworking could be a source of new and innovative designs and creative production. Finally, as cotton is a natural resource, one could imagine that there could be potential for development in the area of innovative textile design and garments. With respect to these design-related sectors, such as jewelry, for example, one could distinguish between products directed at a larger mass-oriented export market, and products directed at a more elite clientele both nationally and internationally.

In the short term, the crafts sector can be strengthened through professionalization, capacity-building to raise the quality of the work, and capacity-building to improve entrepreneurial and marketing skills. Strengthening the crafts sector fits with the government strategy of developing cultural villages throughout the country. A clear distinction should be made, however, between producing crafts, sculptures and souvenirs for sale in cultural villages, fairs, and export markets in a mass consumption manner, and the creativity employed by an artist in making unique pieces of work.

In this respect, the growth of the visual arts sector can be seen as a medium-term goal for the creative industries. There is already a basis with which to work, in particular with artists who are already circulating internationally. Improving their working conditions – through favorable government policy directly in favour of the arts, but also in terms of targeted fiscal and export policies, improved investment facilitation and increased networking – are ways of moving this sector forward.

Working to develop both the crafts and the visual arts sectors can be beneficial for both. It is clear that in some cases artists start producing crafts because they are unable to make a living from their own artistic production. The financial necessity of turning to duplication work should not be confused with creativity, and it should be clear that there is a serious need to support artists. Development of the creative industries sector requires both. In some cases, outstanding producers of crafts might shift towards more creative production, if they see the visual arts sector flourish. The Government could also create specific programmes to provide awards – for example, access to arts education – for a particularly skilled worker from the cultural villages.

The audiovisual and media sector can be considered in medium to long-term strategies for developing the creative industries. This sector needs time to develop in Zambia, and it will first need to develop in the national market. However, there may be some trade potential, in particular, in audiovisual production based on existing activities in the sector. Strengthening this domain can go hand in hand with nurturing new media and graphic design.

The performing arts sector seems to have most potential in terms of the national market, and as such, it should be considered for its contribution to the creation of employment. However, this sector is less of a potential target for global markets. The book publishing sector – like the performing arts sector – is not a high-potential target for increased export and trade development. Again, it seems to have most potential for growth at the national level. Finally, given the strong competition from neighboring countries on the continent, the music sector is not in an advantageous position for the moment. This is also a sector where finding a space in the internal, national market may be the first step forward. Valuing local musical traditions and finding ways of giving them a place in contemporary society, not only as a recovery of heritage, but also as part of an enriching and vibrant contemporary scene may be a step in that direction.

### **5.3 COMMUNICATION, NETWORKING, AND STRATEGIC ALLIANCES**

Firstly, a communication strategy to improve understanding and awareness of the growing importance of the creative economy inside Zambia is imperative. The fact that this report was submitted to high-level government officials, and was discussed and validated in a conference with a large audience, was an important step forward. The proposals put forward in this study were therefore legitimated and



supported by the Government and by stakeholders. This gives ownership to the artists and the media sector to join the Government in this endeavor.

UNCTAD has welcomed recent initiatives, which started in September 2009, to put in place a communication and networking campaign for advocacy and to sensitize public opinion and the Government on the importance of strengthening the creative economy as part of an overall development strategy. Some television programmes and the weekly radio programme *Arts in Perspective* provide a platform for discussion on issues relating to the development of Zambia's creative industries. The weekly Zambia media news summary is a positive communication tool to promote debate on cultural and creative economy matters. Issues such as the new culture policy and the budget allocation for arts and culture have already been discussed, in the context of the ongoing debate on the importance of the creative economy to fostering socio-economic and inclusive development in Zambia.

Secondly, enabling arts professionals to network abroad, attend fairs and build alliances is crucial for opening up markets.

Thirdly, the creation of festivals and large events can be extremely beneficial to the development of the creative sectors. Creating an area of specialization and expertise attracts people and fosters exchanges and learning within a specific sector. Furthermore, events such as the EU-ACP festival could be used as an international platform to increase not only the visibility of the creative industries, but also to attract interest and investment with a view to enhancing the creative industries.

As pointed out by the Ministry of Community Development and Social Service, the cinema and audiovisual sector in Zambia can become an optimal channel for disseminating culture, through films, documentaries, television and radio programmes, soap operas, music, videos and other materials.<sup>121</sup>

## 5.4 TOWARD A COMPREHENSIVE CREATIVE INDUSTRIES POLICY

With the objective of working towards a comprehensive creative industries policy, the recommendations made by this multiagency project are structured around three components, which span the two phases of the project:

- (a) Reinforcing the institutional structures and policy framework;
- (b) Providing capacity-building activities at various levels; and
- (c) A communications strategy and awareness-building for the creative industries.

One essential priority was the mobilization of the pertinent government ministries to agree and implement an inter-ministerial policy to foster the development of the creative economy. It is important to get the Creative Economy Inter-Ministerial Committee up and running, in order to ensure that the different ministries are willing to take the required policy actions within their respective spheres. On the occasion of the UNCTAD High-Level Policy Dialogue on Creative Industries held in July 2009 in Lusaka to discuss and validate this study and the plan of action for this project, under the leadership of the Ministry of Community Development and Social Services, seven line ministries agreed in principle and expressed their commitment to constitute the Creative Economy Inter-Ministerial Committee. This was a very positive outcome for the session, and a basic requirement not only for the successful implementation of this multi-agency pilot project, but also to ensure the sustainability of a comprehensive and long-term development strategy for the creative industries in the country.

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<sup>121</sup> Ministry of Community Development and Social Services. Department of Cultural Affairs. Project proposal for an intra-African, Caribbean and Pacific countries (ACP) programme of the ninth European Development Fund in the area of culture.

Moreover, the Government has expressed its willingness in setting up a Creative Economy Centre to foster the sector by providing the facilities for its operations. This is certainly a positive move towards strengthening creative capacities and the competitiveness of Zambian creative products at the national and international level. Eventually, this initial body can evolve into a Zambian Creative Economy Commission Agency. This institutional mechanism could also include an advisory group of professionals from various creative sectors.

Finally, this report has pointed out issues at both, macro and micro level, together with a multi-sectoral series of actions that can be taken within the specific areas. This would help to enhance the creative industries in Zambia as a concrete way to promote trade, to improve supply capacities and to attract investments.

In summary, with this report, UNCTAD – jointly with the other four international agencies involved in this pilot project – is giving its contribution to supporting the Government in its overall efforts towards sustained socio-economic growth and the achievement of the United Nations Millennium Development Goals. As is made clear in UNCTAD's *Least Developed Countries Report 2008*, sustained growth in LDCs cannot be built on the commodity boom alone but requires diversification. UNCTAD urges the development partners of LDCs to actively support country leadership in the design and implementation of national development strategies to promote home-grown development solutions.<sup>122</sup> The proposed strategy for the creative economy presented in this study follows this approach.

It is important to bear in mind that the main object of this study is to strengthen the creative industries in Zambia and to enhance their contribution to development and poverty reduction – through the promotion of culture, creativity, entrepreneurship, decent employment and cultural diversity – and to support the potential of the creative industries for trade growth.

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<sup>122</sup> See the agreed conclusions of Committee I of the UNCTAD Trade and Development Board, on the item “Review of progress in the implementation of the Programme of Action for the Least Developed Countries for the Decade 2001–2010”. Geneva. September 2008.

## PART 6. PLAN OF ACTION

In order to support the Government in executing the required policies and taking the necessary steps to strengthen its creative industries, the implementing agencies have jointly prepared a Plan of Action, which is presented in the following pages. It lists a series of activities that are expected to be undertaken during the second phase of implementation of this multi-agency project, covering the period 2009–2011 depending on the availability of funds.

The Government of Zambia is highly committed to the implementation of the project, whose objectives are in conformity with the goals of the National Development Plan. Therefore, the Government is also allocating funds and human resources to implement some joint activities, in particular those related to improved infrastructure, the development of creative clusters, and the skills of creative professionals.

Given the budgetary constraints, the number of activities is relatively limited. However, they are targeted and expected to have a far-reaching positive impact on harnessing the creative sector in Zambia, particularly because other complementary measures are being taken by other ongoing international cooperation projects.

In phase I of the project, UNCTAD activities are centered on policy advice to the Government through the elaboration of this country study and a plan of action prepared jointly with ILO and UNESCO. In phase II of the project, UNCTAD activities are focused on institution-building and capacity-building for government officials, including on the cross-cutting issues and on trade and investment matters which are crucial to the development of the creative economy and the creative industries. These activities will cover the topics addressed under sections 3 and 4 of this report. Policy advice and technical assistance will also be provided to relevant institutions and professional associations, with the aim of promoting concrete initiatives, strategic alliances and partnerships. UNCTAD will promote targeted activities to improve the visibility of the most competitive creative sectors and to facilitate North–South and South–South cooperation and business opportunities between artists, creators and creative enterprises.

ILO will focus on vocational training and managerial and entrepreneurial skills. Policy advice will be given on issues related to job creation and social security. ILO will also explore linkages with other projects being carried out, particularly on issues related to women artists and ICT tools.

UNESCO will assist the Government in the reinforcement of some artistic and professional associations, as well as on matters related to cultural heritage and cultural diversity. UNESCO will also set up a cybercafé to facilitate networking among artists, the sharing of information, and the marketing of cultural products domestically and in global markets.

This report provides the analysis and the arguments in support of the proposed activities, which have already been duly validated, both by the donors of this project, namely the European Commission and the ACP secretariat, and by the beneficiaries, i.e. the Government and all the stakeholders from the creative industries, in particular the Zambia's artistic and creative communities.

In this context, and on request from UNCTAD, the United Nations Resident Coordinator in Zambia, jointly with the Zambian Government, convened the High-Level Policy Dialogue on Creative Industries, which was held on 2 July 2009 in Lusaka. The meeting brought together government authorities, associations, and stakeholders from the creative sectors, with the aim of presenting UNCTAD's "Strengthening the Creative Industries in Zambia" study and the "Plan of Action for the Multi-Agency Project for 2008–2011". The main outcomes were (a) the recognition that the project is in line with government priorities and therefore will benefit from the full support of the United Nations Resident Coordinator's Office in Zambia and (b) a declaration statement for the endorsement

and validation of the UNCTAD study and the multi-agency plan of action from the main stakeholders, including the Ministry of Community Development and Social Services, the Ministry of Finance and National Planning, the Ministry of Labour, the Ministry of Trade and Industry, the Ministry of Tourism, Environment and Natural Resources, the Ministry of Information and Broadcasting, and the Ministry of Science and Technology. Other stakeholders from the creative and artistic community welcome the study, which is considered an important contribution to increasing the profile of the creative economy as a driver for growth and development in the country.

The validated plan of action is presented below. As the Government of Zambia has decided to reflect some of the policy actions proposed in this study in its Sixth National Development Plan, the activities proposed can be integrated into the Government's national development strategy as a common major goal.

<b>Plan of Action for Strengthening the Creative Industries Prepared in collaboration with the Government of Zambia</b>																
<b>Output 1: Reinforced institutional mechanisms and policy formulation for an enabling environment for creative industries</b>																
Activity	2008		TF/YR1 2009				TF/YR2 2010				TF/YR3 2011				UN Agency	Partners
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
1.1 Coordination meeting in Brussels	x														All	EU/ACP
1.2 Preparation for the launching of the project in Zambia	x	x													All	All relevant ministries and institutions
1.3 Fact-finding mission/stakeholder consultations in Zambia		x													All	All relevant ministries and institutions and stakeholders
1.4 Preparation of plan of action			x	x											All	
1.5 Policy framework and institutional mechanisms for creative policies					x	x	x	x	x	x	x	x	x	x	UNCTAD	All relevant ministries and institutions
1.6 Set up coordination facility for inter-ministerial action - set up advisory group on creative industries with public/private stakeholders					x	x									UNCTAD	All relevant ministries and institutions and stakeholders public and private sector
1.7 Regular meetings of advisory group and coordination facility (video-conference)					x	x	x	x	x	x	x	x			UNCTAD/ILO/UNESCO	Public and private sector stakeholders
1.8 Reporting implementation plan of action /public policies										x					UNCTAD/ILO/UNESCO	Govt. of Zambia
1.9 Policy advise to Zambia National Arts Council to reinforce new media				x	x	x	x	x	x	x					UNCTAD	National Arts Council

<b>Output 2. Policy review on creative industries: identifying key issues and policy recommendations</b>																
Activity	2008		TF-YR1 2009				TF-YR1 2010				TF-YR1 2011				UN Agencies	Partners
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
2.1 Preparation of Zambia creative industries policy review study		x	x	x	x										UNCTAD	All relevant ministries and institutions
2.2 Preparation and convening of High-level Policy Dialogue to present the study to local authorities				x	x										UNCTAD	All relevant ministries and institutions
2.3 Consultation/validation plan of action					x										All	All relevant ministries and institutions
2.4 Printing and distribution of the study							x	x							UNCTAD	All relevant ministries and institutions
2.5 Articulation creative economy strategy							x		x		x		x		All	
<b>Output 3. Developed advocacy, visibility and networking in the country</b>																
Activity	2008		TF-YR1 2009				TF-YR1 2010				TF-YR1 2011				UN Agency	Partners
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
3.1 Develop web content			x	x	x	x	x	x	x	x	x	x	x	x	All	Project Steering Committee
3.2 Update and maintain website							x	x	x	x	x	x	x	x	All	
3.3 Feasibility study, development of the concept of the Book Café			x	x	x	x									UNESCO	All relevant ministries and institutions
3.4 Creation of a network of artists and institutions that collaborate with Book Café				x											UNESCO	All relevant ministries and institutions



	2008		2009				2010				2011					
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
3.5 Creating framework for setting up Book Café in Lusaka with team from Book Café Harare – Business development plan, systems and training requirements						x	x	x	x	x					UNESCO	All relevant ministries and institutions
3.6 Creation of arts programme for Book Café Lusaka with Book Café Harare, network of artists and institutions							x	x	x	x					UNESCO	All relevant ministries and institutions
3.7 Launch of the Book Café Lusaka									x	x					UNESCO	All relevant ministries and institutions
<b>Output 4. Strengthened capacities on trade and investment related issues for policy-makers and institutional stakeholders</b>																
Activity	2008		2009				2010				2011				UN Agencies	Partners
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
4.1 Preparation of UNCTAD's capacity- building module on trade negotiations: market access, EU/ACP cooperation, export promotion, investment and ICT tools				x	x	x									UNCTAD	All relevant ministries and institutions
4.2 Testing and publishing training materials and UNCTAD module							x	x							UNCTAD	
4.3 Capacity-building workshop UNCTAD									x		x				UNCTAD	All relevant ministries and institutions

<b>Output 5: Developed capacity of institutions and skilled artists in business management</b>																
Activity	2008		2009				2010				2011				UN Agencies	Partners
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
5.1 Preparation of publications, workshops, training activities					x	x	x	x							ILO	UNESCO/UNCTAD
5.2 TOT workshops			x	x			x	x							ILO	V. Mthetwa, A. Menyani, J Bailyn
5.3 Follow up trainers support			x	x	x	x	x	x	x						ILO	V. Mthetwa,
5.4 Training of artists															ILO	All relevant ministries and institutions
5.5 Training of microfinance institutions							x	x	x	x					ILO	MFI network
5.6 Adaptation of training materials, organization of workshops for policy-makers and targeted follow-up					x	x									UNESCO	All relevant ministries and institutions
5.7 Strategy to develop political momentum, stockholder's support and sharing of similar experiences in other countries							x	x							UNESCO	
5.8 Prepare and test modules of Development Training Programme at Book Café targeting the youth, women and artists in residence focusing on artists collection, arts journalism, specific disciplines								x	x	x					UNESCO	Pamberi Trust, public and private stockholder
5.9 Develop the artists-in-residence programme Book Café										x	x				UNESCO	Pamberi Trust, public and private stockholder

5.10 First session of the Development Training Programme											x	x			UNESCO	Pamberi Trust, public and private stockholder
5.11 First intake of artists-in-residence											x	x				
5.12 Tertiary Course review									x	x	x	x			ILO GRZ	TEVETA, TAMCOM, Evelyn Hone, University of Zambia, Zambia Open University
5.13 Support to course design												x	x	x	ILO GRZ	TEVETA, TAMCOM, Evelyn Hone, University of Zambia, Zambia Open University
5.14 Staff development						x	x	x	x	x	x	x	x	x	ILO GTZ	TEVETA, TAMCOM, Evelyn Hone, University of Zambia, Zambia Open University

### Output 6. Strengthened synergies and collaboration with other institutions

Activity	2008		2009				2010				2011				UN Agency	Partners
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4		
6.1 Promote North/South and South/South cooperation on selected creative sectors					x	x	x	x	x	x	x	x	x	x	UNCTAD	All relevant ministries and institutions
6.2 Promote and develop Africa-to-Africa cooperation through adapting the concept of a Book Café in other countries (ex. Johannesburg, Dakar)												x	x	x	UNESCO	Pamberi Trust, public and private stockholder
6.3 Support the export the products of those artists					x	x	x	x	x	x	x				UNESCO	Pamberi Trust, public and private

producing at the Book Café through internet																		stockholder
<b>Output 7. Developed working space and infrastructure</b>																		
Activity	2008		2009				2010				2011				UN Agency	Partners		
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
7.1 Support to the completion of provincial cultural villages	x		x	x	x	x	x	x	x	x					UNESCO GRZ	Department of Cultural Affairs		
7.2 Support to the rehabilitation of Theatre houses							x	x	x	x	x	x	x	x	UNESCO GRZ	National Arts Council		
7.3 Training for Cultural and Arts officers to manage villages and theatres											x	x	x	x	ILO GRZ	Training institutions, Department and Provincial administration		
7.4 Sensitization workshops with communities on their involvement with the cultural villages and theatres												x	x	x	UNCTAD GRZ	Department of Cultural Affairs and National Arts Council		
<b>Output 8. Improved access to arts material and equipment</b>																		
Activity	2008		2009				2010				2011				UN Agency	Partners		
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
8.1 Consultation on the Creative Industries Development Fund							x	x	x	x	x				UNCTAD GTZ	Department of Culture, National Arts Council		
8.2 Equipping cultural villages and theatre with basic equipment												x	x	x	UNESCO	Department of Culture, National Arts Council		
<b>Output 9. Completed monitoring and evaluation in the country</b>																		
Activity	2008		2009				2010				2011							
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4				
9.1 Monitoring and evaluation							x				x			x	All	All stakeholders		

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# COUNTRY PROFILE AND STATISTICS

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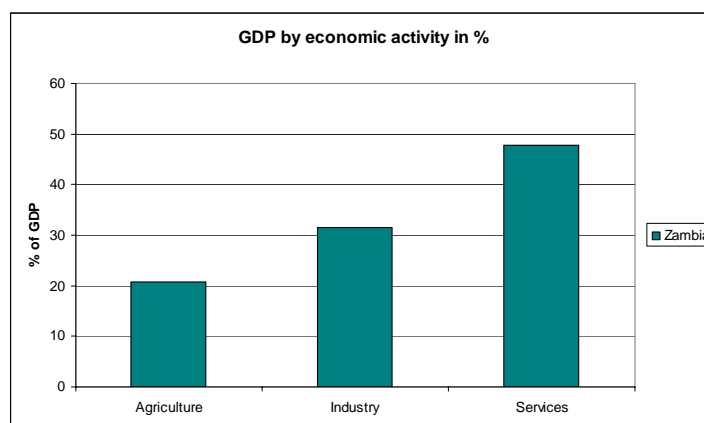
Note: All statistical data presented in this annex is extracted from the UNCTAD Database on creative economy. <http://www.unctad.org/creative-programme>

## PART 7. COUNTRY PROFILE AND STATISTICS

### 7.1 ZAMBIA COUNTRY PROFILE: ECONOMIC INDICATORS AND STATISTICS

	2000	2005	2008
Population in thousands	10,467	11,738	12,620
GDP in millions US\$	3,239	7,272	14,441
GDP per capita in US\$	309	619	1,144

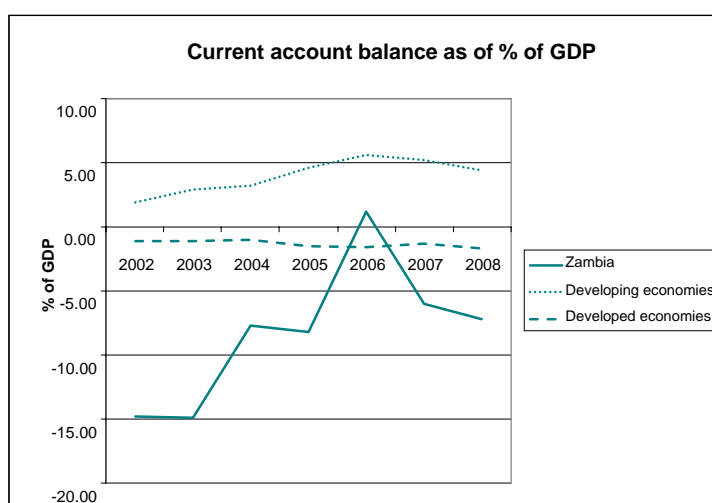
#### Gross domestic product by economic activity in 2008- Zambia



#### Annual average gross domestic product growth rate in %

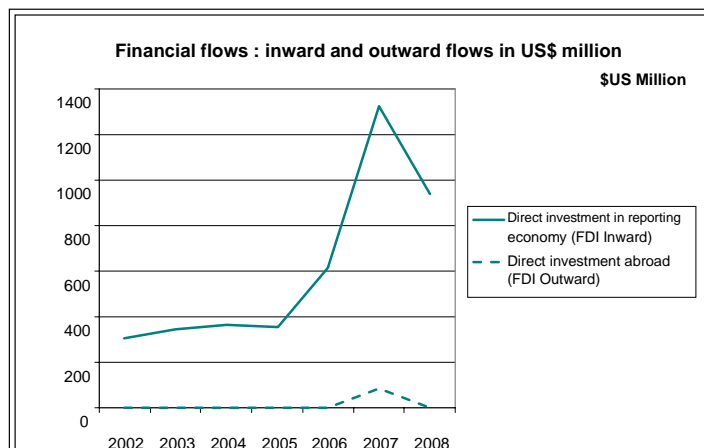
	2000 - 2005	2005	2008
<b>Zambia</b>	4.72	5.22	6.30
Developing economies	5.47	6.77	5.47
Economies in transition	6.15	6.41	5.40
Developed economies	1.95	2.37	0.86

#### Current account balance as % of GDP





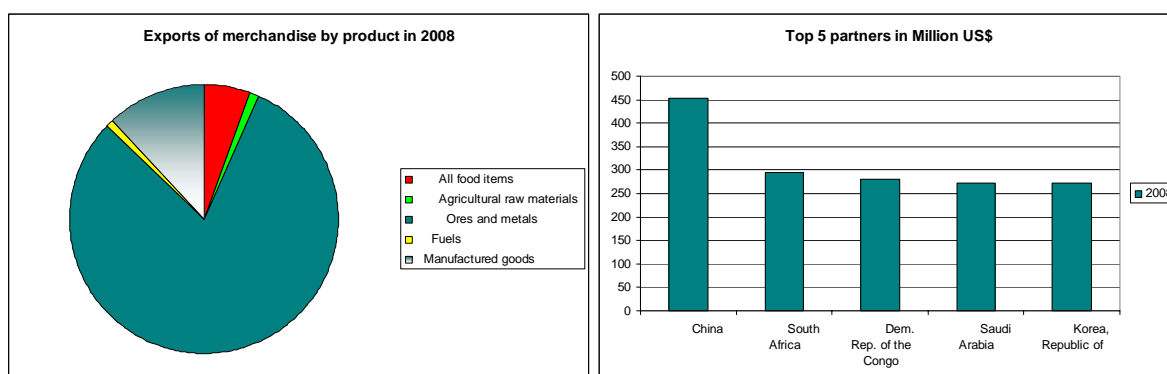
### Financial flows to country in US\$ million - Zambia



### Total international trade in million US\$ - Zambia

	2000	2005	2008
Exports of merchandise	892	1,810	5,099
Exports of services	115	273	297
Imports of merchandise	888	2,558	5,060
Imports of services	335	471	911

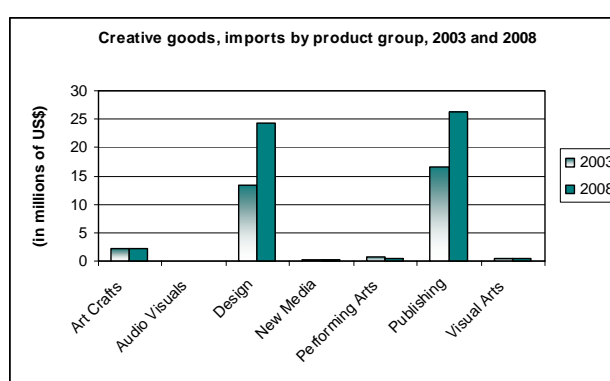
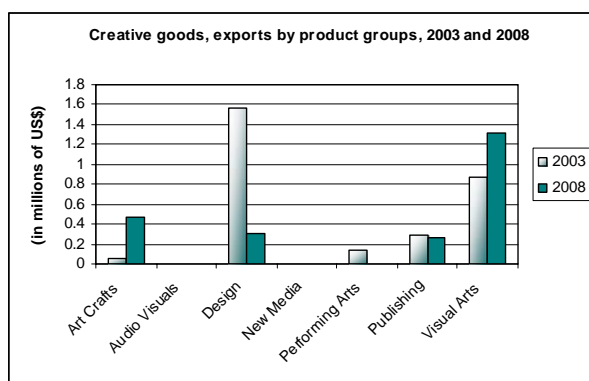
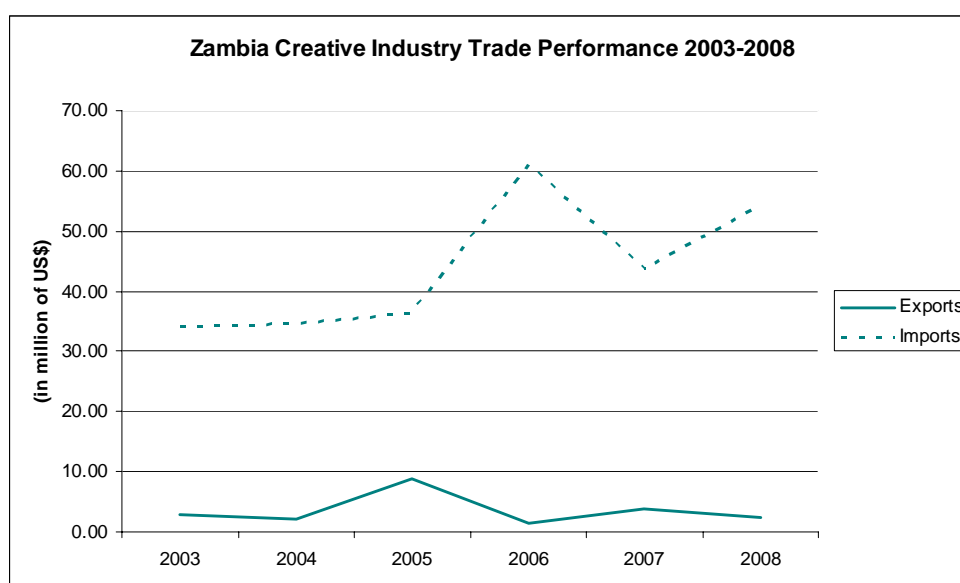
### Exports of merchandise by product and partner in 2008 - Zambia

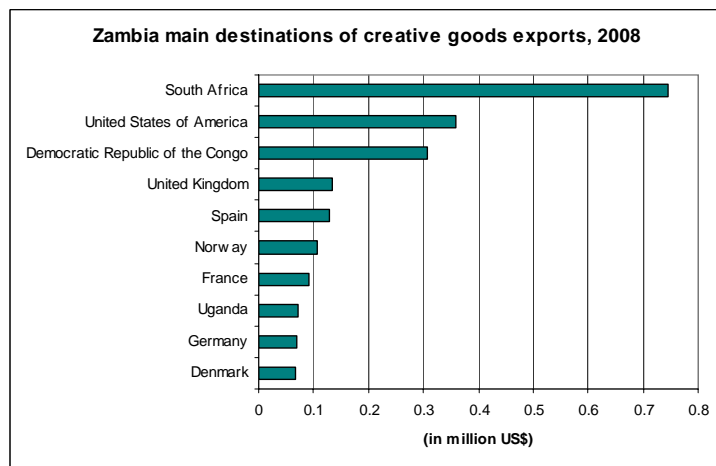
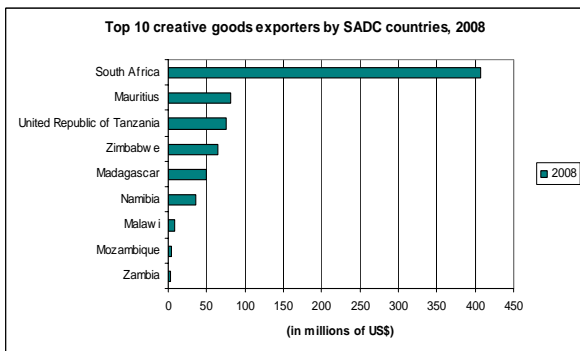
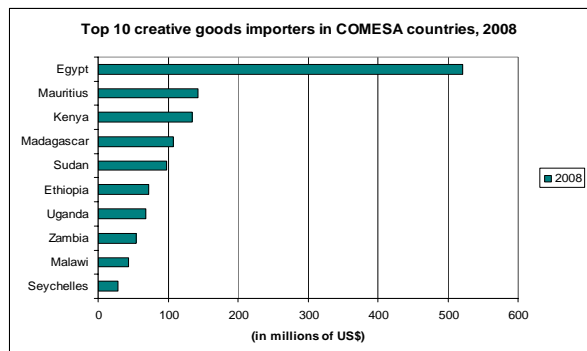
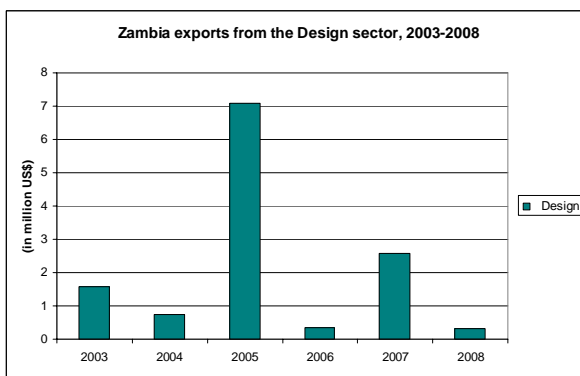
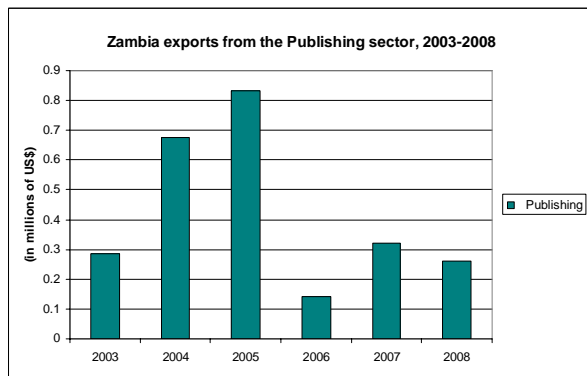
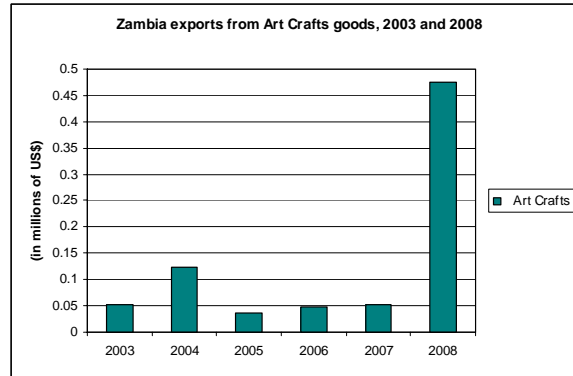


## 7.2 CREATIVE INDUSTRIES TRADE PERFORMANCE

### Part I. Creative Industries trade performance, 2003 and 2008

		(in millions of US\$)				
ZAMBIA	Value 2003			Value 2008		
	Export	Import	Balance	Export	Import	Balance
All Creative Industries	2.92	34.09	-31.17	2.36	54.25	-51.89
Creative Goods	2.92	34.09	-31.17	2.36	54.25	-51.89





## Part 2. Zambia Creative Industries Trade Performance by sectors, 2003 and 2008

PRODUCT	2003							
	Value			Share (%)				
	(in million US\$)			(% of total products)		(% of world)		
	Exports	Imports	Balance	Exports	Imports	Exports	Imports	
<b>All Creative Industries</b>	2.92	34.09	-31.18	100	100	0.00	0.01	
<b>Art Crafts</b>	0.05	2.23	-2.18	1.77	6.54	0.00	0.00	
Carpets	0.01	0.43	-0.43	0.39	6.63	0.00	0.00	
Celebration	0.01	0.12	-0.11	0.50	1.87	0.00	0.00	
Other	0.03	0.14	-0.11	1.63	2.09	0.00	0.00	
Paperware	..	0.10			1.46	0.00	0.00	
Wickerware	0.00	0.01	-0.01	0.02	0.10	0.00	0.00	
Yarn	0.01	1.43	-1.43	0.37	21.94	0.00	0.00	
<b>Audio Visuals</b>	0.00	0.00		0.00	0.00	0.00	0.00	
Film	..	0.00		0.00	0.00	0.00	0.00	
<b>Design</b>	1.56	13.47	-11.90	53.63	39.50	0.00	0.01	
Architecture	0.02	0.01	0.02	0.04	0.02	0.00	0.00	
Fashion	0.15	2.03	-1.88	0.28	5.15	0.00	0.00	
Glassware	0.00	0.10	-0.10	0.00	0.27	0.00	0.00	
Interior	0.30	9.50	-9.20	0.56	24.06	0.00	0.00	
Jewellery	1.08	1.07	0.01	2.00	2.70	0.00	0.00	
Toys	0.01	0.75	-0.74	0.02	1.90	0.00	0.00	
<b>New Media</b>	0.00	0.36	-0.36	0.07	1.07	0.00	0.00	
Recorded Media	..	0.19		0.00	17.91	0.00	0.00	
Video Games	0.00	0.17	-0.17	2.92	16.18	0.00	0.00	
<b>Performing Arts</b>	0.14	0.79	-0.65	4.69	2.31	0.00	0.00	
Music (CD, Tapes)	0.14	0.79	-0.65	2.92	34.01	0.00	0.00	
Printed Music	..	0.00		0.00	0.08	0.00	0.00	
<b>Publishing</b>	0.29	16.69	-16.40	9.83	48.95	0.00	0.01	
Books	0.15	14.50	-14.35	1.48	29.62	0.00	0.01	
Newspaper	0.10	1.36	-1.26	1.04	2.78	0.00	0.00	
Other Printed Matter	0.04	0.83	-0.79	0.39	1.70	0.00	0.00	
<b>Visual Arts</b>	0.88	0.55	0.32	30.01	1.62	0.00	0.00	
Antiques	0.01	0.07	-0.06	0.04	4.06	0.00	0.00	
Paintings	0.22	0.15	0.07	0.73	9.15	0.00	0.00	
Photography	..	0.11		0.00	6.57	0.00	0.00	
Sculpture	0.65	0.23	0.41	2.15	14.32	0.00	0.00	

2008									
PRODUCT	Value			Share (%)				Growth rate	
	(in million US\$)			(% of total products)		(% of world)		2003-2008 (%)	
	Exports	Imports	Balance	Exports	Imports	Export	Imports	Export	Import
<b>All Creative Industries</b>	2.36	54.25	-51.89	100	100	0.00	0.01	-3.20	10.62
<b>Art Crafts</b>	0.48	2.14	-1.67	20.18	3.95	0.00	0.01	28.44	-3.63
Carpets	..	1.37	..	..	2.52	..	0.02	28.33	16.12
Celebration	0.42	0.23	0.19	17.92	0.42	0.01	0.00	28.73	16.96
Other	0.01	0.31	-0.30	0.46	0.56	0.00	0.01	-27.95	20.38
Paperware	..	0.01	..	..	0.01	..	0.00	-33.94	-35.79
Wickerware	0.01	0.03	-0.01	0.52	0.05	0.00	0.00	48.32	28.07
Yarn	0.03	0.21	-0.18	1.29	0.38	0.00	0.00	34.16	-35.32
<b>Audio Visuals</b>	..	0.00	..	..	0.01	..	0.00	..	8.54
Film	..	0.00	..	..	0.01	..	0.00	..	8.54
<b>Design</b>	0.30	24.29	-23.98	12.94	44.77	0.00	0.01	-19.33	14.50
Architecture	..	0.01	..	..	0.02	..	0.00	-66.15	28.31
Fashion	0.03	3.16	-3.13	1.27	5.82	0.00	0.00	-35.22	10.61
Glassware	0.00	0.57	-0.57	0.01	1.05	0.00	0.04	65.04	33.55
Interior	0.24	18.71	-18.47	10.23	34.49	0.00	0.02	17.21	16.45
Jewellery	0.03	0.30	-0.27	1.42	0.56	0.00	0.00	-51.20	-14.80
Toys	..	1.54	..	..	2.84	..	0.00	-49.86	13.58
<b>New Media</b>	0.00	0.30	-0.30	0.00	0.55	0.00	0.00	-55.55	-12.28
Recorded Media	..	..	..	..	..	..	..	-66.70	-14.08
Video Games	0.00	0.30	-0.30	0.00	0.55	0.00	0.00	-44.89	4.19
<b>Performing Arts</b>	0.00	0.59	-0.59	0.01	1.09	0.00	0.00	-75.39	-15.56
Music (CD, Tapes)	0.00	0.59	-0.59	0.01	1.09	0.00	0.00	-75.39	-18.58
Printed Music	..	0.00	..	..	0.00	..	0.00	..	24.92
<b>Publishing</b>	0.26	26.35	-26.09	11.01	48.57	0.00	0.05	-12.06	10.11
Books	0.22	18.61	-18.39	9.33	34.31	0.00	0.09	-2.42	4.41
Newspaper	0.00	6.36	-6.35	0.21	11.72	0.00	0.03	-60.45	39.61
Other Printed Matter	0.03	1.38	-1.34	1.47	2.54	0.00	0.01	-6.88	5.53
<b>Visual Arts</b>	1.32	0.57	0.74	55.86	1.06	0.00	0.00	14.94	3.14
Antiques	1.03	0.01	1.02	43.54	0.02	0.03	0.00	115.78	-40.52
Paintings	0.07	0.07	0.00	3.16	0.13	0.00	0.00	-7.77	-2.31
Photography	0.09	0.10	-0.02	3.64	0.19	0.00	0.00	188.96	-2.96
Sculpture	0.13	0.39	-0.26	5.52	0.72	0.00	0.00	-19.98	15.19

## 7.3 WORLD TRADE STATISTICS OF CREATIVE GOODS AND SERVICES

### 7.3.1. Creative goods: world exports by economic group and country, 2003-2008

Economic group and country/territory	EXPORTS (f.o.b., in millions of \$)						Growth rate (1) 2003-2008
	2003	2004	2005	2006	2007	2008	
<b>World</b>	<b>233400</b>	<b>269331</b>	<b>298549</b>	<b>324407</b>	<b>370298</b>	<b>406992</b>	<b>11.53</b>
Developed economies	140884	158144	171023	185895	211515	227103	10.02
Developing economies	91124	109267	125321	136100	156043	176211	13.55
Transition economies	1392	1920	2206	2413	2741	3678	18.76
<b>Developed economies: America</b>	<b>28774</b>	<b>31557</b>	<b>35221</b>	<b>38841</b>	<b>42012</b>	<b>44215</b>	<b>9.27</b>
Canada	9576	10067	10500	10356	9661	9215	-0.94
Greenland	3	7	8	11	3	-	-
United States of America	19195	21483	24713	28475	32348	35000	13.31
<b>Developed economies: Asia</b>	<b>4055</b>	<b>4611</b>	<b>6122</b>	<b>5480</b>	<b>7045</b>	<b>7574</b>	<b>13.02</b>
Israel	588	623	555	567	612	586	-0.13
Japan	3468	3989	5567	4913	6432	6988	14.74
<b>Developed economies: Europe</b>	<b>106998</b>	<b>120701</b>	<b>128355</b>	<b>140251</b>	<b>161087</b>	<b>174018</b>	<b>10.16</b>
European Union (EU)	101459	114176	121573	132501	151876	163650	9.99
Austria	4212	4435	4690	5191	5645	6313	8.48
Belgium	6496	7325	7373	7562	8673	9220	6.74
Bulgaria	186	221	228	255	345	377	15.23
Cyprus	32	38	39	30	29	29	-4.27
Czech Republic	1824	2114	2437	3195	4075	4892	22.74
Denmark	2883	3202	3173	3903	4366	4319	9.44
Estonia	237	247	267	294	337	382	10.27
Finland	1083	1078	976	1091	1224	1113	1.80
France	10556	11865	12834	14108	15640	17271	10.16
Germany	17442	19955	22487	25578	30393	34408	14.66
Greece	625	655	701	818	828	944	8.68
Hungary	563	707	761	794	947	1096	12.92
Ireland	2922	2774	2769	2796	2300	2192	-5.53
Italy	17712	19962	20478	22954	26688	27792	9.69
Latvia	133	176	182	207	235	261	13.24
Lithuania	249	338	427	544	730	766	26.30
Luxembourg	227	252	215	199	341	327	7.89
Malta	100	118	112	124	136	131	5.53
Netherlands	5587	6314	6687	7019	7772	10527	11.59
Poland	2565	3170	3440	3732	4723	5250	14.89
Portugal	928	1011	926	987	1206	1248	6.10
Romania	1008	1199	1279	1355	1401	1471	7.13
Slovakia	546	701	814	868	1122	1264	17.59
Slovenia	516	682	728	777	919	977	12.59
Spain	4898	5236	5140	5236	5965	6287	4.85
Sweden	3025	3484	3458	3825	4166	4897	9.09
United Kingdom	14903	16917	18952	19060	21669	19898	6.47



Economic group and country/territory	EXPORTS (f.o.b., in millions of \$)						Growth rate (1) 2003-2008
	2003	2004	2005	2006	2007	2008	
Other European countries	5539	6525	6782	7750	9211	10367	13.08
Andorra	6	7	10	12	-	-	-
Faeroe Islands	-	-	-	0	0	0	-
Iceland	13	12	10	9	7	5	-16.36
Norway	319	347	367	364	385	446	5.82
Switzerland	5201	6159	6395	7364	8820	9916	13.54
<b>Developed economies:</b>	<b>1057</b>	<b>1275</b>	<b>1325</b>	<b>1323</b>	<b>1371</b>	<b>1297</b>	<b>3.60</b>
<b>Oceania</b>							
Australia	780	959	1005	1015	1072	1022	4.96
New Zealand	277	316	320	308	299	275	-0.68
<b>Developing economies:</b>	<b>809</b>	<b>889</b>	<b>981</b>	<b>1361</b>	<b>1520</b>	<b>2220</b>	<b>22.09</b>
<b>Africa</b>							
<b>Developing economies:</b>	124	170	182	495	424	364	29.71
<b>Eastern Africa</b>							
Burundi	-	-	-	1	1	0	-
Ethiopia	-	1	1	1	40	4	-
Kenya	18	20	26	37	45	58	28.40
Madagascar	24	29	30	33	42	50	14.74
Malawi	1	1	1	6	6	8	52.47
Mauritius	76	75	77	93	82	82	2.24
Mayotte	0	0	0	0	0	0	60.02
Mozambique	1	1	1	1	1	5	27.27
Rwanda	-	0	1	0	1	2	-
Seychelles	-	-	-	-	-	0	-
Uganda	1	1	1	1	8	11	90.89
United Republic of Tanzania	-	-	11	18	25	76	-
Zambia	3	2	9	1	4	2	-3.20
Zimbabwe	-	40	23	303	169	65	-
<b>Developing economies:</b>	-	8	7	2	-	-	-
<b>Middle Africa</b>							
Cameroon	-	-	1	1	-	-	-
Gabon	-	8	6	0	-	-	-
<b>Developing economies:</b>	293	304	333	384	447	1185	26.72
<b>Northern Africa</b>							
Algeria	5	5	5	3	4	3	-10.23
Egypt	-	-	-	-	-	703	-
Morocco	159	162	178	178	207	217	6.73
Sudan	-	-	-	-	-	0	-
Tunisia	129	138	150	202	237	262	16.97
<b>Developing economies:</b>	374	385	406	364	360	443	1.53
<b>Southern Africa</b>							
Namibia	15	22	21	22	24	35	14.28
South Africa	360	362	385	342	335	408	0.79
<b>Developing economies:</b>	17	21	54	116	289	228	84.85
<b>Western Africa</b>							
Benin	-	-	-	0	-	-	-
Burkina Faso	-	2	3	-	-	-	-
Cape Verde	-	-	-	-	0	-	-

Economic group and country/territory	EXPORTS (f.o.b., in millions of \$)						Growth rate (1) 2003-2008
	2003	2004	2005	2006	2007	2008	
Côte d'Ivoire	12	11	12	13	14	15	5.83
Ghana	-	-	27	86	2	4	-
Guinea	-	-	0	0	0	0	-
Mali	-	1	0	1	1	2	-
Niger	-	0	0	0	3	1	-
Nigeria	-	-	-	9	259	197	-
Senegal	5	7	8	6	9	9	10.50
Togo	-	1	4	-	1	-	-
<b>Developing economies: America</b>	<b>5381</b>	<b>6059</b>	<b>6584</b>	<b>7405</b>	<b>8012</b>	<b>9030</b>	<b>10.66</b>
<b>Developing economies: Caribbean</b>	26	125	59	645	456	548	85.34
Aruba	-	-	1	-	-	-	-
Bahamas	4	3	1	4	2	6	9.89
Barbados	-	-	10	21	4	26	-
Cuba	22	103	16	21	-	-	-
Dominica	-	-	-	0	0	0	-
Dominican Republic	-	-	-	544	405	481	-
Jamaica	-	4	5	8	5	4	-
Montserrat	-	0	0	0	0	0	-
Netherlands Antilles	-	-	9	30	19	15	-
Trinidad and Tobago	-	16	17	18	20	17	-
<b>Developing economies: Central America</b>	3453	3582	3983	4128	4717	5496	9.53
Belize	-	-	0	1	1	0	-
Costa Rica	82	114	139	129	118	109	4.34
El Salvador	26	20	60	65	78	98	36.41
Guatemala	33	37	104	45	99	105	25.32
Honduras	8	4	3	29	22	-	-
Mexico	3298	3402	3672	3853	4390	5167	9.13
Nicaragua	2	2	2	2	2	11	37.51
Panama	5	4	3	4	6	7	9.29
<b>Developing economies: South America</b>	1902	2351	2542	2633	2840	2986	8.50
Argentina	192	254	294	328	335	295	9.26
Bolivia (Plurinational State of)	67	76	78	90	99	89	6.87
Brazil	895	1159	1200	1175	1211	1222	4.89
Chile	163	194	220	231	214	227	5.92
Colombia	365	406	450	480	654	748	15.62
Ecuador	23	26	25	32	24	47	11.18
Guyana	-	-	2	1	2	2	-
Paraguay	9	14	13	13	15	24	16.14
Peru	138	176	207	224	239	263	12.77
Uruguay	51	47	52	55	48	52	0.60
Venezuela (Bolivarian Republic of)	-	-	-	5	-	16	-
<b>Developing economies: Asia</b>	<b>84923</b>	<b>102299</b>	<b>117733</b>	<b>127313</b>	<b>146484</b>	<b>164933</b>	<b>13.64</b>

Economic group and country/territory	EXPORTS (f.o.b., in millions of \$)						Growth rate (1) 2003-2008
	2003	2004	2005	2006	2007	2008	
<b>Developing economies: Eastern Asia</b>	66735	78496	89512	97324	111030	125706	13.04
China	38568	45620	55515	62725	72999	84807	16.92
China, Hong Kong SAR	24210	25885	27237	27552	31080	33254	6.33
China, Macao SAR	76	86	74	93	138	170	17.62
China, Taiwan Province of	-	3137	3017	3177	3223	3203	-
Korea, Republic of	3877	3765	3665	3773	3585	4272	1.05
Mongolia	3	3	4	5	5	-	-
<b>Developing economies: Southern Asia</b>	6605	8838	10247	11720	11531	11161	10.69
Afghanistan	-	-	-	-	-	182	-
Bangladesh	60	126	139	145	180	-	-
Bhutan	-	-	8	-	-	1	-
India	4444	6746	7630	9125	9907	9450	15.70
Iran (Islamic Republic of)	783	774	812	843	-	-	-
Maldives	-	0	0	0	0	0	-
Nepal	80	-	-	-	-	-	-
Pakistan	1059	1013	1495	1434	1282	1349	5.50
Sri Lanka	179	179	162	171	162	179	-0.66
<b>Developing economies: South-Eastern Asia</b>	8393	10943	11855	13042	14789	17379	14.17
Cambodia	-	35	-	-	-	14	-
Malaysia	1934	2459	2702	3022	3576	3524	12.86
Philippines	-	-	-	-	659	580	-
Singapore	3454	3753	3771	4220	3787	5047	5.99
Thailand	3005	3318	3794	3873	4319	5077	10.31
Timor-Leste	-	1	1	-	-	-	-
Viet Nam	-	1376	1588	1927	2449	3136	-
<b>Developing economies: Western Asia</b>	3190	4021	6119	5228	9134	10687	26.94
Bahrain	10	14	26	21	32	-	-
Jordan	110	156	217	245	203	198	11.61
Kuwait	-	-	-	56	54	-	-
Lebanon	125	154	170	188	218	278	15.74
Occupied Palestinian territory	-	-	-	-	14	19	-
Oman	8	25	36	18	18	45	22.56
Qatar	-	-	17	9	27	15	-
Saudi Arabia	307	471	311	522	514	-	-
Syrian Arab Republic	-	-	56	263	241	-	-
Turkey	2629	3200	3756	3900	4890	5369	14.96
United Arab Emirates	-	-	1532	-	2915	4760	-
Yemen	-	-	-	6	6	2	-
<b>Developing economies: Oceania</b>	<b>12</b>	<b>20</b>	<b>22</b>	<b>21</b>	<b>27</b>	<b>27</b>	<b>15.76</b>
Cook Islands	-	-	0	-	-	-	-
Fiji	11	9	5	5	5	-	-
French Polynesia	-	9	16	15	20	26	-
Kiribati	-	-	-	-	-	-	-

Economic group and country/territory	EXPORTS (f.o.b., in millions of \$)						Growth rate (1) 2003-2008
	2003	2004	2005	2006	2007	2008	
New Caledonia	1	1	1	1	1	1	5.43
Papua New Guinea	0	0	-	-	-	-	-
Vanuatu	-	-	-	-	0	-	-
<b>Transition economies:</b>	32	56	77	78	69	54	9.90
<b>Asia</b>							
Armenia	29	36	37	39	31	27	-2.21
Azerbaijan	-	2	5	6	12	11	-
Georgia	-	-	4	5	3	5	-
Kazakhstan	-	12	26	21	18	12	-
Kyrgyzstan	3	5	4	7	5	-	-
Turkmenistan	-	-	-	-	-	-	-
<b>Transition economies:</b>	1348	1822	2079	2262	2573	3307	17.37
<b>Europe</b>							
Albania	8	13	16	19	26	30	27.99
Belarus	247	328	276	303	397	451	11.09
Bosnia and Herzegovina	31	48	66	80	102	129	31.15
Croatia	192	353	367	372	422	412	13.29
Russian Federation	869	1080	1256	1380	1481	1734	13.69
Serbia and Montenegro	-	-	98	108	145	-	-
Ukraine	-	-	-	-	-	553	-

SOURCE: UNCTAD secretariat calculations based on United Nations Comtrade database data

Data extraction date (31 May 2010)

**Note:** (1) Annual average growth rate only available for countries that reported consistently in 2003-2008

- Data not available or not separately reported

## 7.3.2. Creative goods: world imports by economic group and country, 2003-2008

Economic group and country/territory	IMPORTS (c.i.f., in millions of \$)						Growth rate (1) 2003-2008
	2003	2004	2005	2006	2007	2008	
<b>World</b>	<b>250160</b>	<b>284624</b>	<b>317175</b>	<b>337506</b>	<b>402452</b>	<b>420783</b>	<b>11.15</b>
Developed economies	205869	230741	250975	266902	306808	317058	9.18
Developing economies	41842	50492	62090	65426	88370	93721	17.90
Transition economies	2448	3391	4110	5178	7274	10003	31.40
<b>Developed economies: America</b>	<b>79805</b>	<b>86735</b>	<b>94453</b>	<b>100243</b>	<b>109145</b>	<b>104706</b>	<b>6.20</b>
Canada	9162	9846	10940	12015	13602	14736	10.33
Greenland	22	26	26	25	17	-	-
United States of America	70621	76862	83488	88203	95525	89971	5.63
<b>Developed economies: Asia</b>	<b>13810</b>	<b>15399</b>	<b>17095</b>	<b>18073</b>	<b>19484</b>	<b>19736</b>	<b>7.55</b>
Israel	786	872	894	946	1103	1224	8.87
Japan	13025	14526	16202	17128	18381	18512	7.46
<b>Developed economies: Europe</b>	<b>107686</b>	<b>123069</b>	<b>133393</b>	<b>142370</b>	<b>170815</b>	<b>184353</b>	<b>11.27</b>
<b>European Union (EU)</b>	<b>97541</b>	<b>111718</b>	<b>120901</b>	<b>129456</b>	<b>155144</b>	<b>166750</b>	<b>11.26</b>
Austria	3946	4742	4953	5279	6768	7132	12.40
Belgium	5685	6412	6769	6919	7940	8632	8.18
Bulgaria	258	313	363	430	633	756	24.46
Cyprus	256	295	311	350	433	497	14.01
Czech Republic	1609	1987	2185	2660	3185	3802	18.41
Denmark	2188	2270	2696	3099	3789	4129	14.87
Estonia	181	198	222	277	365	387	18.15
Finland	1089	1251	1343	1490	1691	1918	11.59
France	13339	15105	16141	17035	20428	22791	10.95
Germany	16841	18372	20757	20730	24579	26866	9.60
Greece	1714	1996	2188	2366	2816	3560	14.59
Hungary	1090	1274	1230	1320	1525	1624	7.72
Ireland	1521	1853	2047	2384	2682	2549	11.60
Italy	7337	8738	9523	10657	12231	12597	11.54
Latvia	204	232	269	404	492	466	21.37
Lithuania	175	225	276	376	497	484	24.83
Luxembourg	527	567	541	578	712	717	6.75
Malta	115	132	140	147	163	174	8.14
Netherlands	5366	6074	6339	6920	8042	12082	15.32
Poland	1332	1634	1891	2257	2988	3837	23.11
Portugal	1547	1764	1697	1827	2100	2161	6.70
Romania	809	901	1034	1204	1546	1791	17.83
Slovakia	436	570	637	709	903	1291	21.84
Slovenia	395	493	470	522	671	711	12.01
Spain	5999	7269	8200	8311	10184	10491	11.53
Sweden	2601	3056	3281	3518	4008	4458	10.76

Economic group and country/territory	IMPORTS (c.i.f., in millions of \$)						Growth rate (1) 2003-2008
	2003	2004	2005	2006	2007	2008	
United Kingdom	20979	23996	25396	27684	33774	30847	9.07
Other European countries	10145	11351	12492	12914	15671	17604	11.33
Andorra	119	130	-	-	-	-	-
Faeroe Islands	23	26	27	33	37	37	11.29
Iceland	124	142	192	212	253	195	12.32
Norway	1875	2112	2365	2547	3092	3468	13.05
Switzerland	8003	8941	9907	10122	12289	13904	11.27
<b>Developed economies: Oceania</b>	<b>4569</b>	<b>5539</b>	<b>6033</b>	<b>6216</b>	<b>7363</b>	<b>8262</b>	<b>11.62</b>
Australia	3747	4566	4931	5146	6103	7040	12.32
New Zealand	822	973	1102	1071	1260	1222	8.11
<b>Developing economies: Africa</b>	<b>2032</b>	<b>2749</b>	<b>3468</b>	<b>4306</b>	<b>4728</b>	<b>5693</b>	<b>22.12</b>
<b>Developing economies: Eastern Africa</b>	341	450	542	652	691	857	18.96
Burundi	-	-	-	7	5	9	-
Ethiopia	-	51	49	55	82	72	-
Kenya	72	90	115	133	133	135	13.70
Madagascar	35	35	33	42	46	108	21.24
Malawi	22	23	31	32	29	43	12.16
Mauritius	116	117	101	106	113	143	2.87
Mayotte	6	9	9	10	11	13	12.47
Mozambique	23	32	47	43	44	51	14.76
Rwanda	-	4	8	20	20	28	-
Seychelles	-	-	-	-	-	29	-
Uganda	33	38	39	49	77	68	18.51
United Republic of Tanzania	-	-	52	73	69	83	-
Zambia	34	35	36	61	44	54	10.62
Zimbabwe	-	15	21	20	17	20	-
<b>Developing economies: Middle Africa</b>	-	19	79	77	-	-	-
Cameroon	-	-	51	52	-	-	-
Gabon	-	19	28	26	-	-	-
<b>Developing economies: Northern Africa</b>	943	1118	1277	1350	1754	2381	18.83
Algeria	183	224	306	253	230	295	6.75
Egypt	-	-	-	-	-	522	-
Morocco	380	435	489	560	796	799	17.55
Sudan	-	-	-	-	102	99	-
Tunisia	380	459	482	537	625	667	11.64
<b>Developing economies: Southern Africa</b>	694	1035	1335	1712	1675	1677	19.06
Namibia	41	80	84	93	111	125	20.67
South Africa	652	955	1251	1619	1565	1552	18.95
<b>Developing economies: Western Africa</b>	55	127	234	515	607	778	70.86
Benin	-	-	-	13	-	-	-
Burkina Faso	-	22	18	-	-	-	-



Economic group and country/territory	IMPORTS (c.i.f., in millions of \$)						Growth rate (1) 2003-2008
	2003	2004	2005	2006	2007	2008	
Cape Verde	-	-	-	-	12	15	-
Côte d'Ivoire	28	38	34	46	52	63	16.19
Ghana	-	-	90	76	105	118	-
Guinea	-	-	8	14	13	18	-
Mali	-	17	14	18	41	42	-
Niger	-	8	19	10	11	13	-
Nigeria	-	-	-	282	291	435	-
Senegal	27	38	46	56	69	74	22.69
Togo	-	5	5	-	13	-	-
<b>Developing economies: America</b>	<b>6683</b>	<b>7437</b>	<b>9140</b>	<b>11522</b>	<b>16862</b>	<b>16007</b>	<b>22.33</b>
<b>Developing economies: Caribbean</b>	184	413	652	1081	1005	1193	43.05
Aruba	-	-	21	-	-	-	-
Bahamas	88	106	122	132	151	106	6.06
Barbados	-	-	94	75	52	84	-
Cuba	95	89	106	110	-	-	-
Dominica	-	-	-	5	6	5	-
Dominican Republic	-	-	-	392	416	486	-
Jamaica	-	141	166	184	192	304	-
Montserrat	-	1	1	1	1	1	-
Netherlands Antilles	-	-	50	71	71	88	-
Trinidad and Tobago	-	76	92	112	116	119	-
<b>Developing economies: Central America</b>	4651	4710	5604	6318	7105	7901	12.12
Belize	-	-	18	15	16	13	-
Costa Rica	172	183	193	223	269	292	11.96
El Salvador	101	106	210	221	279	265	24.84
Guatemala	200	228	326	289	376	369	13.54
Honduras	75	83	111	130	153	-	-
Mexico	3908	4061	4505	5178	5695	6538	11.23
Nicaragua	47	49	55	60	73	69	9.89
Panama	149	-	186	202	245	355	-
Developing economies: South America	1848	2314	2884	4123	8752	6912	36.71
Argentina	217	350	486	602	793	990	34.08
Bolivia (Plurinational State of)	40	42	40	47	58	77	13.34
Brazil	374	484	647	898	1017	1728	33.87
Chile	387	463	556	692	789	1070	21.81
Colombia	275	315	398	500	603	702	21.67
Ecuador	226	254	287	307	310	427	11.61
Guyana	-	-	18	18	19	38	-
Paraguay	74	106	112	159	191	356	32.81
Peru	219	247	282	307	4032	-	-
Uruguay	37	54	59	76	99	123	26.23
Venezuela (Bolivarian Republic of)	-	-	-	516	841	1402	-

Economic group and country/territory	IMPORTS (c.i.f., in millions of \$)						Growth rate (1) 2003-2008
	2003	2004	2005	2006	2007	2008	
<b>Developing economies: Asia</b>	<b>32975</b>	<b>40072</b>	<b>49286</b>	<b>49413</b>	<b>66597</b>	<b>71834</b>	<b>16.75</b>
<b>Developing economies: Eastern Asia</b>	24146	28315	30421	33413	39501	43631	12.27
China	3339	3563	3956	4292	5622	6078	13.54
China, Hong Kong SAR	18072	19828	20726	22752	26310	29473	10.16
China, Macao SAR	253	335	366	492	619	674	22.23
China, Taiwan Province of	-	2055	2292	2220	2382	2604	-
Korea, Republic of	2472	2524	3062	3633	4549	4802	16.21
Mongolia	9	10	18	25	19	-	-
<b>Developing economies: Southern Asia</b>	2160	2553	3212	3517	3918	3482	11.35
Afghanistan	-	-	-	-	-	490	-
Bangladesh	270	348	369	265	332	-	-
Bhutan	-	-	3	-	-	6	-
India	1313	1621	2016	2548	2913	2273	14.50
Iran (Islamic Republic of)	86	153	259	50	-	-	-
Maldives	20	27	27	30	32	40	12.64
Nepal	59	-	-	-	-	-	-
Pakistan	171	139	216	285	292	314	17.18
Sri Lanka	241	266	323	339	348	359	8.50
<b>Developing economies: South-Eastern Asia</b>	4054	5764	5832	6192	8143	9769	17.00
Cambodia	-	376	-	-	-	215	-
Malaysia	670	874	848	932	1022	1004	7.66
Philippines	-	-	-	-	590	500	-
Singapore	2546	2815	3186	3409	4400	5207	15.30
Thailand	837	869	1012	1131	1367	1974	17.88
Timor-Leste	-	2	2	-	-	-	-
Viet Nam	-	828	785	721	764	870	-
<b>Developing economies: Western Asia</b>	2616	3439	9820	6291	15035	14953	43.73
Bahrain	108	106	143	121	148	-	-
Jordan	160	270	416	455	455	457	21.82
Kuwait	-	-	-	721	873	-	-
Lebanon	268	329	305	260	301	389	4.19
Occupied Palestinian territory	-	-	-	-	40	48	-
Oman	7	150	180	227	304	390	90.57
Qatar	-	-	360	470	628	636	-
Saudi Arabia	896	1046	1286	1386	1494	-	-
Syrian Arab Republic	-	-	91	61	55	-	-
Turkey	1177	1538	2063	2547	3208	3523	25.32
United Arab Emirates	-	-	4977	-	7467	9442	-
Yemen	-	-	-	42	62	66	-
<b>Developing economies: Oceania</b>	<b>152</b>	<b>234</b>	<b>197</b>	<b>185</b>	<b>184</b>	<b>187</b>	<b>0.73</b>
Cook Islands	-	-	3	-	-	-	-

Economic group and country/territory	IMPORTS (c.i.f., in millions of \$)						Growth rate (1)
	2003	2004	2005	2006	2007	2008	
	2003	2004	2005	2006	2007	2008	2003-2008
Fiji	77	83	57	51	43	-	-
French Polynesia	-	67	68	67	67	92	-
Kiribati	-	-	1	-	-	-	-
New Caledonia	55	66	68	66	70	96	8.75
Papua New Guinea	21	18	-	-	-	-	-
Vanuatu	-	-	-	-	5	-	-
<b>Transition economies: Asia</b>	26	375	512	712	1014	898	82.30
Armenia	15	18	25	38	52	89	43.74
Azerbaijan	-	44	52	41	56	61	-
Georgia	-	-	44	88	126	137	-
Kazakhstan	-	300	373	518	738	611	-
Kyrgyzstan	12	13	17	26	41	-	-
Turkmenistan	-	-	-	-	-	-	-
<b>Transition economies: Europe</b>	2391	2919	3439	4272	6003	8281	27.82
Albania	43	53	65	76	120	133	26.71
Belarus	145	183	170	254	324	386	22.13
Bosnia and Herzegovina	123	148	210	200	259	327	20.56
Croatia	519	679	758	848	979	962	13.05
Russian Federation	1560	1857	1987	2579	3882	5304	27.82
Serbia and Montenegro	-	-	249	315	437	-	-
Ukraine	-	-	-	-	-	1170	-

SOURCE: UNCTAD secretariat calculations based on United Nations Comtrade database data

Data extraction date (31 May 2010)

**Note:** (1) Annual average growth rate only available for countries that reported consistently in 2003-2008

- Data not available or not separately reported

## 7.3.3. Exports of all creative services (1) by country/territory 2003-2008

Economic group and country/territory	EXPORTS (in million of \$)					
	2003	2004	2005	2006	2007	2008
<b>TOTAL - REPORTING COUNTRIES</b>	<b>72308</b>	<b>86031</b>	<b>99235</b>	<b>147736</b>	<b>164158</b>	<b>185087</b>
<b>DEVELOPED ECONOMIES</b>	61320	73185	81998	125218	138045	153414
Australia	1356	1367	1656	1980	2481	3038
Austria	177	219	236	5226	274	301
Belgium	5224	5609	6075	6482	4550	7167
Bermuda	-	-	-	17	33	31
Bulgaria	66	74	106	204	265	336
Canada	6888	8151	9271	9393	10278	10550
Cyprus	57	101	122	166	226	172
Czech Republic	221	360	842	980	1530	1994
Estonia	67	95	102	131	185	257
Faeroe Islands	1	-	-	-	-	-
Finland	784	826	924	24	19	12
France	1864	2298	2158	1743	1963	2240
Germany	14856	19410	23646	26212	31005	36116
Greece	548	1253	433	425	537	583
Hungary	845	1662	1857	1788	2435	2160
Iceland	4	9	16	12	9	12
Ireland	1228	442	824	297	1607	1777
Italy	4511	5085	5434	6471	7484	6328
Japan	140	72	97	140	156	155
Latvia	79	108	142	160	219	284
Lithuania	77	67	69	90	95	110
Luxembourg	162	189	239	331	626	902
Malta	73	174	384	596	698	780
Netherlands	618	771	902	25784	28968	31052
New Zealand	282	393	287	279	346	460
Norway	1272	1367	2201	3321	3327	4427
Poland	350	669	1049	1524	2049	3282
Portugal	478	617	674	905	1237	1499
Romania	264	378	401	559	758	1235
Slovakia	162	121	218	312	516	397
Slovenia	189	305	324	360	38	479
Spain	4389	5386	5763	7476	9651	10533
Sweden	3861	4126	4501	5072	6296	6923
Switzerland	4	4	5	3	2	4
United Kingdom	3086	3928	4082	3932	3759	4220
United States of America	7137	7549	6958	12823	14422	13598
<b>DEVELOPING ECONOMIES</b>	8185	9363	12771	17133	18835	21182
Angola	1	3	5	6	9	13
Argentina	273	369	572	786	955	1263
Bangladesh	21	19	19	22	72	58
Barbados	1	-	0	0	1	-
Benin	0	1	1	1	1	-
Bolivia	1	1	1	1	1	2

Economic group and country/territory	EXPORTS (in million of \$)					
	2003	2004	2005	2006	2007	2008
Botswana	5	9	9	17	22	25
Brazil	1664	2171	2962	3403	4659	6331
Cambodia	1	1	1	2	2	2
Cameroon	11	17	18	13	14	23
Cape Verde	0	0	0	0	2	0
Chile	68	58	69	78	84	111
China	2405	890	1210	1582	2229	2620
China, Hong Kong SAR	137	290	270	280	272	265
Colombia	83	117	143	228	209	344
Congo	9	11	-	-	-	-
Costa Rica	3	2	3	2	3	3
Côte d'Ivoire	5	5	5	5	6	-
Ecuador	34	36	39	41	44	47
Egypt	84	82	102	147	163	195
El Salvador	1	1	1	1	1	1
Ethiopia	5	4	2	2	2	8
Fiji	0	2	2	3	2	3
French Polynesia	8	5	4	4	9	18
Guatemala	9	2	2	6	3	4
Guinea	-	-	-	-	1	5
Guinea-Bissau	0	-	-	-	-	-
Guyana	-	6	6	7	7	7
Honduras	0	0	0	0	0	12
India	-	1108	3345	5445	5591	4894
Indonesia	-	47	57	74	55	77
Iraq	-	-	-	-	1	-
Jamaica	20	29	30	31	29	39
Kenya	0	0	0	1	2	2
Korea, Republic of	76	128	268	1248	1643	1838
Lebanon	-	-	0	-	-	-
New Caledonia	2	2	1	5	15	6
Madagascar	4	8	2	-	-	-
Malaysia	1835	1670	1562	863	832	872
Mali	0	1	1	1	1	-
Mauritius	5	4	2	2	4	6
Mexico	293	358	373	383	308	87
Mongolia	0	1	0	-	-	-
Morocco	-	-	-	-	-	93
Mozambique	8	0	11	34	36	48
Myanmar	0	-	-	-	-	-
Namibia	0	2	0	1	1	3
Netherlands Antilles	5	5	5	8	9	-
Niger	0	-	0	1	1	-
Occupied Palestinian territory	3	1	5	0	-	-
Pakistan	35	38	75	121	66	89
Panama	-	-	26	1	-	-
Papua New Guinea	-	0	0	-	-	-
Paraguay	14	16	19	18	19	20

Economic group and country/territory	EXPORTS (in million of \$)					
	2003	2004	2005	2006	2007	2008
Peru	-	-	-	-	-	4
Philippines	9	7	20	789	34	40
Republic of Moldova	2	2	5	8	11	18
Rwanda	-	-	-	1	0	-
Samoa	-	0	1	2	4	-
Senegal	2	6	3	3	5	-
Sierra Leone	-	0	0	0	0	0
Singapore	154	185	180	203	239	268
Solomon Islands	1	1	1	2	-	-
South Africa	60	88	114	103	90	99
Sudan	0	-	-	0	5	0
Swaziland	2	22	2	3	4	-
Syrian Arab Republic	-	62	85	92	30	-
Togo	0	0	0	0	0	-
Tonga	1	0	1	1	1	-
Tunisia	5	10	4	3	3	6
Turkey	781	1418	1079	998	971	1224
United Republic of Tanzania	1	0	1	0	1	10
Uruguay	0	1	0	2	0	0
Venezuela (Bolivarian Republic of)	36	42	45	49	51	77
<b>ECONOMIES IN TRANSITION</b>	2803	3483	4467	5385	7279	10491
Albania	5	8	18	58	141	72
Armenia	2	6	6	7	8	9
Azerbaijan	2	3	3	4	5	8
Belarus	10	31	37	5	99	151
Bosnia and Herzegovina	-	-	-	4	4	5
Croatia	334	413	441	498	595	841
Georgia	0	2	3	6	11	12
Kazakhstan	28	40	60	81	118	210
Kyrgyzstan	7	10	10	15	50	75
Montenegro	-	-	-	-	-	18
Russian Federation	2183	2628	3384	4015	5191	6994
Serbia	-	-	-	-	-	584
Tajikistan	0	1	1	1	4	1
The former Yugoslav Republic of Macedonia	34	46	45	56	87	116
Ukraine	198	295	458	636	966	1396

SOURCE: IMF Balance of Payments Statistics and UNCTAD calculations based on IMF Balance of Payments Statistics

NOTES: (1) "All creative services" is composed of the following categories of services: "advertising, market research and public opinion polling services"; "architectural, engineering and other technical services"; "research and development services"; and "personal, cultural and recreational services". "Audiovisual and related services" and "other personal, cultural and recreational services" are sub-items of "personal, cultural and recreational services".

(2) The figures in this table cannot be used for international comparisons or ranking because most countries do not report all categories of creative services and the reported categories vary with countries. Therefore, the figures present only the aggregation of reported categories by country.

- Data not available or not separately reported



## 7.3.4. Imports of all creative services (1) by country/territory, 2003-2008

Economic group and country/territory	IMPORTS (in million of \$)					
	2003	2004	2005	2006	2007	2008
<b>TOTAL - REPORTING COUNTRIES</b>	<b>76066</b>	<b>82774</b>	<b>92609</b>	<b>122714</b>	<b>154387</b>	<b>168669</b>
<b>DEVELOPED ECONOMIES</b>	62349	69611	77143	100104	124777	134043
Australia	1125	1361	1460	1495	2102	3144
Austria	467	693	728	2927	845	929
Belgium	4393	4896	5165	5329	6136	8317
Bermuda	-	-	-	10	18	17
Bulgaria	172	151	223	343	439	596
Canada	4749	5127	5200	5782	6320	6440
Cyprus	76	135	134	160	196	212
Czech Republic	482	468	841	925	1147	1177
Estonia	41	48	51	69	82	121
Faeroe Islands	1	-	-	-	-	-
Finland	2874	3013	3742	27	4742	82
France	2344	2624	2821	2687	3156	3671
Germany	17346	19538	22031	25253	25872	28416
Greece	338	552	415	509	634	836
Hungary	845	1911	2171	1826	2229	2433
Iceland	11	12	13	14	17	10
Ireland	5663	3992	4855	4707	15247	16764
Italy	4444	5449	6155	5669	7228	6636
Japan	946	1081	1115	1299	1318	1215
Latvia	38	70	85	111	161	208
Lithuania	28	41	44	61	69	89
Luxembourg	418	477	333	428	617	820
Malta	8	52	111	211	288	248
Netherlands	746	880	949	18475	19992	21713
New Zealand	256	301	212	322	205	217
Norway	664	832	1338	1651	1743	2136
Poland	831	917	1110	1356	1783	2253
Portugal	612	789	823	1118	1269	1602
Romania	327	350	385	399	447	785
Slovakia	331	112	399	449	541	655
Slovenia	256	314	404	462	99	578
Spain	4527	5593	5635	6487	8014	8115
Sweden	5298	5708	5636	6362	8268	9591
Switzerland	90	95	87	85	94	106
United Kingdom	1396	1619	1515	1577	1907	2033
United States of America	206	409	959	1520	1552	1878
<b>DEVELOPING ECONOMIES</b>	10487	8513	10175	16574	21107	23447
Angola	11	28	45	65	99	121
Argentina	172	242	280	335	440	513
Bangladesh	37	40	69	88	79	75
Barbados	0	1	0	0	1	-
Benin	0	0	0	0	2	-

Economic group and country/territory	IMPORTS (in million of \$)					
	2003	2004	2005	2006	2007	2008
Bolivia	4	5	6	8	9	10
Botswana	37	44	21	20	36	39
Brazil	1435	1678	2158	2389	3251	4089
Cambodia	3	4	4	5	5	5
Cameroon	4	4	2	9	10	6
Cape Verde	3	3	3	2	6	8
Chile	47	48	53	55	42	47
China	3977	874	869	1076	1491	2195
China, Hong Kong SAR	68	52	52	56	67	140
Colombia	253	359	386	498	667	714
Congo	3	4	-	-	-	-
Costa Rica	36	32	27	51	69	58
Côte d'Ivoire	2	2	3	3	3	-
Ecuador	92	98	106	116	126	137
Egypt	15	15	22	39	29	80
El Salvador	2	3	3	4	3	4
Ethiopia	28	28	27	14	17	42
Fiji	4	5	5	8	5	6
French Polynesia	7	10	10	9	6	11
Guatemala	5	3	3	9	8	7
Guinea	0	1	-	-	1	11
Guinea-Bissau	-	-	-	-	-	-
Guyana	-	5	5	5	6	6
Honduras	4	5	6	6	8	10
India	-	1194	2013	3443	5572	5434
Indonesia	-	184	166	124	107	126
Iraq	-	-	151	118	27	-
Jamaica	47	30	36	38	33	33
Kenya	2	1	1	2	1	1
Korea, Republic of	261	376	477	4497	5221	6257
Lebanon	-	-	0	-	-	0
New Caledonia	8	11	38	41	56	72
Madagascar	50	19	15	-	-	-
Malaysia	2922	1899	1855	1431	1996	1177
Mali	0	14	15	16	6	-
Mauritius	14	21	31	34	39	40
Mexico	221	225	275	326	259	227
Mongolia	0	-	0	2	-	-
Morocco	-	-	-	-	-	28
Mozambique	46	0	18	84	82	47
Myanmar	6	3	3	7	-	-
Namibia	20	62	46	45	31	44
Netherlands Antilles	3	2	2	2	2	-
Niger	1	0	0	6	0	-
Occupied Palestinian territory	36	16	18	18	69	-
Pakistan	55	23	51	38	68	91
Panama	-	-	25	4	-	-
Paraguay	7	3	1	0	1	1
Papua New Guinea	-	0	0	-	-	-

Economic group and country/territory	IMPORTS (in million of \$)					
	2003	2004	2005	2006	2007	2008
Peru	-	-	-	-	-	16
Philippines	15	15	9	545	39	39
Republic of Moldova	4	9	10	4	6	9
Rwanda	-	-	-	7	3	2
Samoa	-	0	1	0	0	-
Senegal	3	3	1	3	3	-
Sierra Leone	1	2	0	1	1	2
Singapore	241	268	279	261	278	312
Solomon Islands	0	0	0	0	-	-
South Africa	3	5	8	9	10	10
Sudan	0	-	-	-	5	4
Swaziland	3	38	27	24	49	-
Syrian Arab Republic	-	27	21	32	20	-
Togo	-	0	0	0	0	-
Tonga	0	0	0	0	1	-
Tunisia	4	6	6	10	7	11
Turkey	117	186	107	140	158	235
United Republic of Tanzania	1	0	0	0	2	2
Uruguay	10	7	10	9	10	10
Venezuela (Bolivarian Republic of)	135	266	296	385	461	886
<b>ECONOMIES IN TRANSITION</b>	3230	4651	5291	6036	8503	11179
Albania	8	30	107	117	119	82
Armenia	6	7	8	9	10	14
Azerbaijan	5	5	5	6	8	12
Belarus	8	39	61	16	105	123
Bosnia and Herzegovina	-	-	-	4	4	5
Croatia	379	488	537	615	645	737
Georgia	2	2	2	1	13	37
Kazakhstan	709	1354	1616	1326	1772	1856
Kyrgyzstan	5	8	25	41	33	47
Montenegro	-	-	-	-	-	34
Russian Federation	1752	2232	2444	3296	4908	6840
Serbia	-	-	-	-	-	367
Tajikistan	0	1	2	0	106	4
The former Yugoslav Republic of Macedonia	52	62	73	63	91	114
Ukraine	303	424	413	542	689	906

**SOURCE:** IMF Balance of Payments Statistics and UNCTAD calculations based on IMF Balance of Payments Statistic

NOTES: (1) "All creative services" is composed of the following categories of services: "advertising, market research and public opinion polling services"; "architectural, engineering and other technical services"; "research and development services"; and "personal, cultural and recreational services". "Audiovisual and related services" and "other personal, cultural and recreational services" are sub-items of "personal, cultural and recreational services".

(2) The figures in this table cannot be used for international comparisons or ranking because most countries do not report all categories of creative services and the reported categories vary with countries. Therefore, the figures present only the aggregation of reported categories by country.

- Data not available or not separately reported

## 7.4 ZAMBIA TRADE OF CREATIVE GOODS

### 7.4.1. Zambia trade of creative goods, 2003-2008

(in thousand of US\$)							
PRODUCT	FLOW	2003	2004	2005	2006	2007	2008
<b>Creative Goods</b>	Imports	34,093	34,578	36,399	60,942	43,603	54,246
	Exports	2,916	2,115	8,932	1,337	3,887	2,357
Art Crafts	Imports	2,230	1,662	1,154	1,239	1,125	2,144
	Exports	52	123	37	47	52	476
Audio Visuals	Imports	3	6	2	3	10	3
	Exports	..	..	1	..	..	..
Design	Imports	13,467	12,045	16,378	18,479	21,015	24,286
	Exports	1,564	743	7,089	332	2,566	305
New Media	Imports	363	1,111	793	1,171	296	297
	Exports	2	48	26	6	..	0
Performing Arts	Imports	788	783	1,191	3,422	123	594
	Exports	137	176	8	6	..	0
Publishing	Imports	16,690	18,676	16,446	36,054	20,669	26,348
	Exports	287	675	834	140	322	259
Visual Arts	Imports	553	296	435	574	364	573
	Exports	875	350	937	806	947	1,316

Note: ... Data not available or not separately reported

### 7.4.2. Zambia trade of creative goods with Southern African development community (SADC), by product groups, 2003-2008

(in thousand of US\$)							
PRODUCT	FLOW	2003	2004	2005	2006	2007	2008
<b>Creative Goods</b>	Imports	21,421	19,561	20,416	42,185	26,830	29,359
	Exports	764	991	7,963	428	3,030	1,206
Art Crafts	Imports	1,424	857	708	781	715	1,117
	Exports	29	69	7	14	20	460
Audio Visuals	Imports	1	1	2	2	4	1
	Exports	..	..	..	..	..	..
Design	Imports	10,485	6,940	8,533	10,428	12,718	12,762
	Exports	461	459	6,827	146	2,529	268
New Media	Imports	250	438	326	522	146	241
	Exports	2	0	25	6	..	..
Performing Arts	Imports	583	468	445	438	23	342
	Exports	..	8	8	0	..	0
Publishing	Imports	8,460	10,669	10,069	29,689	12,950	14,431
	Exports	151	425	806	119	316	172
Visual Arts	Imports	218	187	334	325	274	465
	Exports	121	30	290	143	166	306

Note: ... Data not available or not separately reported

**List of SADC countries:** Angola, Botswana, Democratic Republic of Congo, Lesotho, Madagascar, Malawi, Mauritius, Mozambique, Namibia, Seychelles, South Africa, Swaziland, United Republic of Tanzania, Zambia and Zimbabwe.

### 7.4.3 Zambia trade of creative goods to the Common Market for Eastern and Southern Africa (COMESA), by product groups, 2003-2008

(in thousand of US\$)							
PRODUCT	FLOW	2003	2004	2005	2006	2007	2008
<b>Creative Goods</b>	Imports	7,077	2,329	3,543	25,965	3,595	4,082
	Exports	760	1,020	6,986	101	2,699	462
Art Crafts	Imports	231	382	26	181	77	489
	Exports	0	7	2	6	14	36
Audio Visuals	Imports	0	1	0	0	1	2
	Exports	..	..	..	..	..	..
Design	Imports	4,423	1,623	3,185	3,804	2,863	2,852
	Exports	276	350	6,695	65	2,477	238
New Media	Imports	7	77	2	29	7	1
	Exports	2	..	0	..	..	..
Performing Arts	Imports	27	18	1	3	..	59
	Exports	137	169	6	0	..	0
Publishing	Imports	2,319	218	319	21,904	599	585
	Exports	203	490	88	26	187	167
Visual Arts	Imports	71	9	11	42	47	95
	Exports	142	3	196	3	21	22
Note: ... Data not available or not separately reported							
<b>List of COMESA countries:</b> Burundi, Comoros, Democratic Republic of Congo, Djibouti, Egypt, Eritrea, Ethiopia, Kenya, Libya, Madagascar, Malawi, Mauritius, Rwanda, Seychelles, Sudan, Swaziland, Uganda, Zambia, Zimbabwe.							

#### 7.4.4 Zambia trade of creative goods with the African, Caribbean and Pacific Group of States (ACP), by product groups, 2003-2008

(in thousand of US\$)							
PRODUCT	FLOW	2003	2004	2005	2006	2007	2008
Creative Goods	Imports	23,383	19,736	20,707	42,460	27,192	29,768
	Exports	1,012	1,364	7,992	437	3,037	1,286
Art Crafts	Imports	1,424	858	708	782	718	1,117
	Exports	29	76	7	14	20	460
Audio Visuals	Imports	1	2	2	3	5	3
	Exports	..	..	..	..	..	..
Design	Imports	10,631	6,981	8,558	10,481	12,821	12,945
	Exports	461	460	6,827	149	2,530	271
New Media	Imports	251	448	329	554	154	241
	Exports	2	0	25	6	..	..
Performing Arts	Imports	586	473	448	444	25	400
	Exports	137	176	8	0	..	0
Publishing	Imports	10,271	10,783	10,325	29,862	13,194	14,591
	Exports	261	621	807	123	316	249
Visual Arts	Imports	218	190	336	334	275	471
	Exports	122	31	317	145	171	306

Note: ... Data not available or not separately reported

**List of ACP countries:** Angola, Antigua & Barbuda, The Bahamas, Barbados, Belize, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Democratic Republic of Congo, Congo, Cook Islands, Ivory Coast, Cuba, Djibouti, Dominica, Dominican Republic, East Timor, Equatorial Guinea, Eritrea, Ethiopia, Fiji, Gabon, Gambia, Ghana, Grenada, Guinea, Guinea-Bissau, Guyana, Haiti, Jamaica, Kenya, Kiribati, Lesotho, Liberia, Madagascar, Malawi, Mali, Marshall Islands, Mauritania, Mauritius, Federated States of Micronesia, Mozambique, Namibia, Nauru, Niger, Nigeria, Niue, Palau, Papua New Guinea, Rwanda, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Samoa, Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Solomon Islands, Somalia, South Africa, Sudan, Suriname, Swaziland, Tanzania, Togo, Tonga, Trinidad and Tobago, Tuvalu, Uganda, Vanuatu, Zambia, Zimbabwe.

#### 7.4.5. Zambia trade of creative goods to South Africa, by product groups,

(in thousand of US\$)							
PRODUCT	FLOW	2003	2004	2005	2006	2007	2008
Creative Goods	Imports	16,141	17,104	17,156	16,631	21,006	25,049
	Exports	240	270	241	282	195	746
Art Crafts	Imports	1,214	462	604	687	597	989
	Exports	26	64	5	..	4	424
Audio Visuals	Imports	1	1	2	2	4	1
	Exports	..	..	..	..	..	..
Design	Imports	6,113	5,299	5,490	6,831	9,696	10,644
	Exports	138	78	130	78	46	26
New Media	Imports	243	362	322	519	145	239
	Exports	..	..	..	0	..	..
Performing Arts	Imports	555	452	440	438	22	330
	Exports	..	0	0	..	..	..
Publishing	Imports	7,869	10,351	9,979	7,861	10,314	12,472
	Exports	39	103	22	64	7	20
Visual Arts	Imports	146	177	320	292	228	374
	Exports	37	26	85	140	139	276

#### 7.4.6. Zambia trade of creative goods to Africa (excluding South Africa), by product groups, 2003-2008

(in thousand of US\$)							
PRODUCT	FLOW	2003	2004	2005	2006	2007	2008
Creative Goods	Imports	7,348	2,794	3,808	26,253	6,507	5,881
	Exports	837	1,096	7,723	162	2,839	543
Art Crafts	Imports	296	460	122	253	195	608
	Exports	3	11	2	20	17	36
Audio Visuals	Imports	0	1	0	0	1	2
	Exports	..	..	..	..	..	..
Design	Imports	4,538	1,779	3,302	3,915	3,353	2,980
	Exports	323	383	6,697	72	2,484	245
New Media	Imports	8	86	7	35	9	2
	Exports	2	0	25	5	..	..
Performing Arts	Imports	31	21	8	6	2	71
	Exports	137	176	8	0	..	0
Publishing	Imports	2,404	433	353	22,001	2,900	2,121
	Exports	220	521	786	60	310	229
Visual Arts	Imports	72	14	16	43	47	97
	Exports	153	5	206	6	29	33

Note: ... Data not available or not separately reported

**List of African countries** except South Africa: Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Côte d'Ivoire, Democratic Republic of the Congo, Djibouti, Egypt, Equatorial Guinea, Eritrea, Ethiopia, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Libya, Madagascar, Malawi, Mali, Mauritania, Mauritius, Morocco, Mozambique, Namibia, Niger, Nigeria, Republic of the Congo, Rwanda, São Tomé and Príncipe, Senegal, Seychelles, Sierra Leone, Somalia, Sudan, Swaziland, Tanzania, Togo, Tunisia, Uganda, Zambia, Zimbabwe.

#### 7.4.7. Zambia trade of creative goods to the European Union, (EU 27), 2003-2008

(in thousands of US\$)							
PRODUCT	FLOW	2003	2004	2005	2006	2007	2008
Creative Goods	Imports	40.8	69.0	50.5	63.7	47.2	59.9
	Exports	4.7	1.7	1.8	2.0	3.6	5.4

**List of EU 27 countries:** Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom.

#### 7.4.8. Zambia trade balance of creative goods, 2003-2008

(in thousands of US)							
PRODUCT	FLOW	2003	2004	2005	2006	2007	2008
Creative Goods	Imports	341	346	364	609	436	542
	Exports	29	21	89	13	39	24