

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

# STRENGTHENING THE CREATIVE INDUSTRIES FOR DEVELOPMENT

in Mozambique

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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UNITED NATIONS  
New York and Geneva, 2011

## NOTES

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

No.2: Strengthening the Creative Industries for Development in Mozambique (English and Portuguese)

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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 Mozambique 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, as a basis for a long-term national strategy.

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 a more inclusive and sustainable development. Among the expected results are the creation of a participatory methodology, the identification of key creative sectors, and the development of a policy framework to foster creative capacity<sup>1</sup>.

UNCTAD will continue to assist governments to nurture their creative economy in support to the achievement of the Millennium Development Goals. 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 transform untapped creative resources into socio-economic growth.



**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 Mozambique in July 2008, holding consultations with government officials, and meetings and interviews with stakeholders, visiting relevant institutions, and collecting documentation and factual information. Pedro Pimenta, UNCTAD's local consultant, provided comments. From the UNCTAD secretariat, Carolina Quintana provided research and statistical assistance, Eleanor Loukass provided editorial support, Sophie Combette designed the cover page and Maria Leonor de Oliveira made the translation into Portuguese of this publication. Experts from the International Labour Organization (ILO) and the United Nations Educational, Scientific and Cultural Organization (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. Special thanks go 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.

Our gratitude also goes to the Ministry of Education and Culture (MEC), for the support provided to the project and also to the other line ministries that provided comments to this study, including the Ministry of Industry and Commerce (MIC), the Ministry of Labour and Ministry of Foreign Affairs and Cooperation.

The large number of institutions engaged in the promotion and dissemination of creative industries includes the National Institute of Cinema (INAC), Mozambican Association of Film Producers (AMOCINE), Association of Mozabican Musicians (AMMO), Mozambican Society of Authors (SOMAS), Observatory for Cultural Policies in Africa (OCPA), Society to Support Small Project Investments (GAPI), National Institute of Book and Records, Centro de Estudos e Desenvolvimento do Artesanato (CEDARTE), Escola Nacional de Artes Visuais (ENAV), Instituto Superior de Artes e Cultura (ISAC), Centro Nairucu Artes, Ekaya Productions and Radio Mozambique.

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 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 and poverty reduction in line with the achievement of the Millennium Development Goals.

Finally, UNCTAD expresses its special thanks to key international organizations based in Mozambique that have been supportive of our work in the context of implementing this project, in particular the United Nations Resident Coordinator and the offices of the United Nations Development Programme and the International Labour Organization, as well as representatives of the European Commission and the UNESCO office.

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**LIST OF ABBREVIATIONS**

ACP	African, Caribbean and Pacific States
AGOA	Africa Growth and Opportunity Act
AMOCINE	Mozambican Film-makers Association
EBA	Everything But Arms
EBAS	European Business Assistance Scheme
EC	European Commission
EU	European Union
CNCD	National Song and Dance Company of Mozambique
ILO	International Labour Organization
INAC	National Cinema and Audiovisual Institute
INLD	National Institute of Books and Disks
IPEX	Instituto para a Promoção de Exportações
IPR	Intellectual Property Rights
ISAC	Instituto Superior de Artes e Cultura
ITC	International Trade Centre
LDCs	least developed countries
MDG-F	Joint Programme on Strengthening Culture and Creative Industries and Inclusive Policies in Mozambique of the UNDP/Spain MDG Achievement Fund
MEC	Ministry of Education and Culture
MIC	Ministry of Industry and Trade
NEPAD	New Partnership for African Development
NGO	non-governmental organization
ODA	official development assistance
PARPA II	Action Plan for the Reduction of Absolute Poverty, 2006-2009
PEEC	Strategic Plan for Education and Culture, 2006-2011
PPP	public-private partnerships
SADC	Southern African Development Community
SME	small and medium-sized enterprises
SOMAS	Mozambican Society of Authors
UNDP	United Nation Development Programme
UNESCO	United Nations Educational Scientific and Cultural Organization
VAT	value added tax
WTO	World Trade Organization



# *Strengthening the Creative Industries in Mozambique*

## **Project background**

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 phase I of the project. It was prepared by UNCTAD in collaboration with the Government of Mozambique 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 creative industries in Mozambique to examine key issues and formulate policy proposals for a strategic plan of action.

The EU-ACP Support Programme to cultural industries in ACP countries is funded by the European Commission, managed and implemented by the Secretariat of the African, Caribbean and Pacific Group of States (ACP). It 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: (1) 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) an ACP/ILO/UNCTAD/UNESCO joint project to strengthen the creative industries in 5 selected ACP countries (Fiji, Mozambique, Senegal, Trinidad and Tobago and Zambia), implemented by the UN agencies, 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 per cent 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 the ACP partners.



## EXECUTIVE SUMMARY

This report was prepared with the purpose to make an analytical assessment and a policy review of the current status of creative industries in Mozambique to identify key issues and formulate policy proposals 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 Mozambique's economic, political and social environment. Throughout each of the chapters of the study, concrete policy actions are proposed with the aim to promote and strengthen the creative industries in Mozambique.

Part II describes the project context and the efforts undertaken at local level to develop the creative economy. The Government of Mozambique has always given culture an important place in society and recognizes the importance of nurturing its rich traditions of art, music, dance, literature, film, and other forms of creative talent, as well as its richness in cultural heritage and traditional knowledge. The study analyses the linkages between the creative economy with the Millennium Development Goals. It also highlights the importance of shaping policies for the creative economy in line with the objectives for a sustainable development and a greener economy taking into consideration the Mozambique Agenda 2025.

Part III, provides an overview of macroeconomic issues and cross-cutting factors that have an impact in the development of the creative economy. The institutional framework and the current organizational structure for the administration of cultural policy are analysed. Particular attention is given to the Agenda 2025 and the Mozambique Poverty Reduction Strategy Paper (PRSP) and the Education and Culture Strategic Plan (PEEC) with a view to provide an enabling environment for safeguarding and promoting Mozambique's tangible and intangible heritage and to ensure the development and promotion of cultural industries. The chapter highlights the main institutional mechanisms in place to support the sector and gives an overview of the organization of the professional sector in the country, identifying the main stakeholders, and key actions. An examination of the current regulatory framework and legislation is also presented. Issues related to financing and possible links with microfinancing schemes, as well as competition policy, and employment are some of the areas that need to be reinforced for the development of a creative business environment. The report also emphasizes the importance of IPRs and the need to make its implementation at local and international level more effective. In the same way, countries can stimulate their creative sectors 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 study recognizes 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. However, Mozambique's total trade on creative goods amounted to \$4.5 million in 2008. 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 Mozambique 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, audiovisuals, new media, music and the publishing sector. In the views of UNCTAD, in the short-medium terms, the creative sectors with better potential for development are: visuals arts, art crafts, and fashion.

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 Mozambique is presented in Part VI of this study.

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 Mozambique 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) as well as the Santo Domingo Resolution (2006), adopted by the ACP ministers of culture. Mozambique was the second beneficiary country visited. This study is the UNCTAD contribution for the first phase of the project implementation.

In the scope of the project, UNCTAD is focusing on the economic aspects, offering policy advice, technical assistance and capacity-building activities intended to enhance public policies, supply capacities and trade and investment related to the creative industries. ILO work 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 segments of the creative industries 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 target creative sectors are: (a) performing arts;<sup>3</sup> (b) audiovisual and new media;<sup>4</sup> (c) publishing and aspects of the “book chain”.<sup>5</sup> Within the broader scope 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 two local missions and extensive collaboration with local stakeholders, including government officials, professionals from the specific sectors 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 the national policy agenda.

**Figure 1. H.E President of the Republic of Mozambique with the Chief of the Creative Economy Programme at UNCTAD, inaugurating the Makonde Art exhibition at the UN in Geneva, 2009**



<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 2001.

<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 reading).



As part of the methodology, UNCTAD organized a High-level Policy Dialogue on Creative Industries in Mozambique, which was held on 29 June 2009 in Maputo.<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 office of the United Nations Resident Coordinator and the UNESCO office in Maputo as well as in liaison with the Ministry of Education and Culture. The meeting was opened by the United Nations Resident Coordinator and chaired by the Permanent Secretary of the Ministry of Labour, and included the participation of key stakeholders from the public and private sectors, in particular practitioners from the creative industries and representatives from relevant international organizations. UNCTAD made a comprehensive presentation of the study identifying key issues and proposing a number of policy actions. Officials from six ministries and all the stakeholders addressed the session and unanimously recognized the importance and good quality of this study. It was agreed that the chair would lead the process of official validation of the study and that the UNCTAD secretariat would incorporate all comments received in order to finalize and publish this study in English and Portuguese. As a follow-up to the meeting, a document was signed by the main stakeholders from the government and artistic community endorsing the study and approving the plan of action jointly prepared by UNCTAD/ILO/UNESCO. This official signing and validation statements by government officials was received on 15 October 2009 agreeing to constitute the Creative Economy Inter-Ministerial Committee, as proposed by UNCTAD.

**Figure 2: UNCTAD High-Level Policy Dialogue on Creative Industries and presentation of the Study "Strengthening the Creative Industries in Mozambique", Maputo, June, 2009**



Photo by Carolina Quintana

## 1.1 COUNTRY INFORMATION

Mozambique currently has a population of about 20.4 million inhabitants and demographic growth was 2.4 per cent over the 2001–2007 period.<sup>7</sup> Mozambique is situated on the south-east coast of Africa, on the Indian Ocean. The country shares common borders with Malawi, South Africa, the United Republic of Tanzania, Zambia and Zimbabwe. The territory is subdivided into 10 provinces and the capital city of Maputo. Approximately 30 per cent of the population live in the urban areas of Maputo, Beira and Nampula. The country is home to a rich mix of people and cultures, including the Bantu from Central Africa, Arabs, Indians and Europeans. The Bantu is the predominant ethnic group made up of a number of different groups and sub-groups. The country has 28 recognized languages and many dialects, although according to national experts today there is no exact information about the precise number of languages spoken in the country.<sup>8</sup> Portuguese is the main language of education,

<sup>6</sup> See: UNCTAD Creative Programme E-Newsletter no.º 10. Geneva. September 2009.

<sup>7</sup> Republic of Mozambique, MEC: 2.

<sup>8</sup> See, *Desafios na gestão da diversidade do património linguístico em Moçambique*. Paper presented by Dr. Marcelino Liphola at the II National Conference on Culture, Maputo, May 2009.

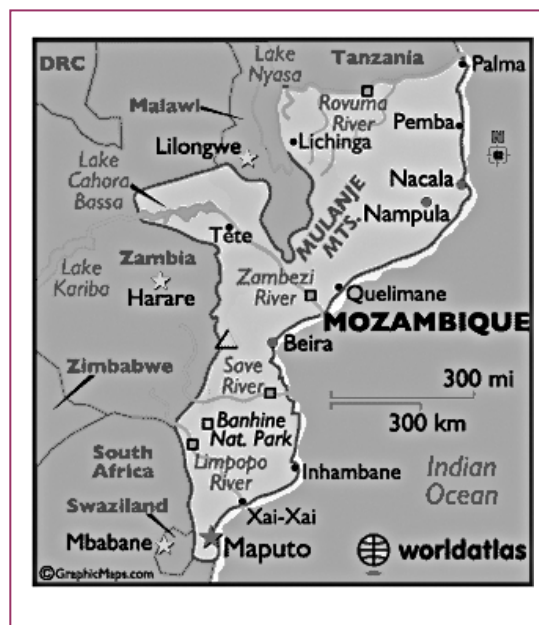
communication and administration. In spite of Portuguese being the official language, only about 6.5 per cent of the population speak Portuguese as their mother tongue.

According to the United Nations, Mozambique 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>9</sup>.

Mozambique achieved independence on 25 June 1975. Armed fighting against Portuguese colonial rule began in 1964 under the leadership of the Mozambique Liberation Front (FRELIMO). Eduardo Mondlane was the first leader of the FRELIMO party, and after his death in 1969, Samora Machel assumed leadership and became the first president of the Republic of Mozambique. FRELIMO gained power in 1975. Two years later in 1977, fighting broke out between FRELIMO and the National Resistance Party of Mozambique (RENAMO) and lasted 15 years. Tensions with neighbouring states, economic collapse and a completely disrupted infrastructure characterized the post-independence period. After Samora Machel died in a plane crash in 1986, Joaquim Alberto Chissano became president. In 1992 the Rome General Peace Accords were signed. The new constitution that was enacted in 1990 called for a multi-party political system, a market-based economy, and free elections.

During the presidential elections held in Mozambique in 2009, Armando Guebuza was re-elected.

**Figure 3. Country map**



Source: Map of Mozambique, WorldAtlas.com

## 1.2 POLITICAL STRUCTURE

In Mozambique the electoral and democratic process has existed for about two decades. Suffrage is universal and the President is elected for a term of five years. The government structure consists of a President, Prime Minister and Council of Ministers. There is a National Assembly and municipal assemblies. The judiciary system has a Supreme Court and provincial, district, and municipal courts. The 1990 Constitution was amended in 2004.

The government's drive for reform had transformed Mozambique into a multi-party democracy with a market economy. In 1994 the country held its first democratic elections. Joaquim Chissano was elected

<sup>9</sup> See the annual issues of the *Least Developed Countries Report* published by UNCTAD.

President and a 250-member National Assembly was voted. The second general elections were held in December 1999, and President Chissano was re-elected. The second local elections, with about 2.4 million registered voters, took place in November 2003. The third general elections were in December 2004. Armando Guebuza won and became President of Mozambique on 2 February 2005. The government scheduled municipal elections in 2008 and presidential and parliamentary elections took place in October 2009. Armando Guebuza became Mozambique's President for a second five-year term.

### 1.3 ECONOMIC BACKGROUND

Mozambique is one of the 49 least developed countries (LDCs) in the world. Most of its population is poor but with increasing purchasing power, because since 1995 the country has been enjoying a steady economic growth of more than 7 per cent per year. It managed to maintain a high economic growth rate, with an average of 8.7 per cent during 2000–2007.<sup>10</sup> This growth is driven mainly by foreign direct investment and public spending largely financed by foreign aid to undertake mega-projects. Mozambique's gross domestic product (GDP) is estimated at around \$9.8 billion in 2008, and GDP per capita has increased to \$900 in 2008. Today, Mozambique is considered a successful example of a post-conflict transition economy.

Since its initial reform, macro-economic policies have been geared to reduce inflation and achieving exchange rate stability. The government has placed tight controls on spending and money supply, combined with financial sector reforms, all of which have contributed to reducing inflation from 70 per cent in 1994 to 16.7 per cent in 2002 and 10.3 per cent in 2008, helped by a major reform that introduced the new metical as the national currency. In recent years, trade has become more important to its economy. The ratio of trade in goods and services to GDP increased from 54 per cent in 2001 to 64 per cent in 2007.

**Figure 4: Economic and social indicators**

ECONOMIC AND SOCIAL INDICATORS		2008		
Population, mid-year ( <i>millions</i> )		22.4		
GNI per capita ( <i>Atlas method, US\$</i> )		380		
Poverty ( <i>% of population below national poverty line</i> )		54		
Urban population ( <i>% of total population</i> )		35		
Life expectancy at birth ( <i>years</i> )		48		
Literacy ( <i>% of population age 15+</i> )		44		
STRUCTURE OF THE ECONOMY				
( <i>% of GDP</i> )	1988	1998	2007	2008
<b>Agriculture</b>	42.	30.8	28.1	28.6
<b>Industry</b>	25.4	22.0	25.9	24.3
<b>Manufacturing</b>		11.1	14.9	13.9
<b>Services</b>	31.7	47.2	46.0	47.1

Source: *Mozambique at a glance* ([http://devdata.worldbank.org/AAG/moz\\_aag.pdf](http://devdata.worldbank.org/AAG/moz_aag.pdf))

The country has an abundant endowment of renewable energy and unexploited mineral wealth. Its market-oriented policies have attracted a number of large-scale manufacturing and mineral exploration projects to Mozambique. Economic development has been quite uneven in Mozambique, with the capital city of Maputo enjoying a GDP per capita that is about six times higher than the national average.<sup>11</sup> The traditional Mozambican role of providing its eastern and southern neighbours with

<sup>10</sup> AfDB/OECD (2008): 461.

<sup>11</sup> UNCTAD/ICC (2001). *An Investment Guide to Mozambique, Opportunities and Conditions*.

access to seaports has given transport (rail, road and ports) and related services a central role in the economy as illustrated by the Maputo, Beira and Nacala corridors.

The liberal economic reforms pursued by the government, the privatization of formerly state-owned enterprises and a variety of incentives schemes have laid the ground for profitable investment in a number of areas. Given the low level of diversification of the national industry, an industrial policy strategy was approved in July 2007 providing the basis for the development of key economic sectors.<sup>12</sup> Agriculture (cotton, tobacco, sugar and cashews), fishing and aqua-culture (prawns) are the backbone of the Mozambique economy. More than 75 per cent of the population is employed in the agricultural sector. Nonetheless, services are now becoming a key sector for the economy.

In 2007, Mozambique was upgraded from the International Monetary Fund (IMF) Poverty Reduction and Growth Facility (PRGF) programme and has since pursued a macroeconomic stabilization and structural reform programme for the 2008–2010 period, supported by a three-year Policy Support Instrument.<sup>13</sup>

In 2008, total exports amounted to about \$2.6 billion and are dominated by primary commodities. The main exports are aluminium, electricity, tobacco, gas, prawns, sugar, cotton, cashew nuts and timber. The main export markets are Belgium, South Africa, Spain, Portugal, the United Kingdom, Italy, Holland, Zimbabwe, Swaziland, Japan, the United States, Brazil and India.<sup>14</sup> The main imports are machinery, fuels, automobiles, cereals, electrical power and medicines. The main countries from which Mozambique imports are South Africa, Australia, the United States, India, Portugal, China, Germany, France, Japan, Spain, Italy and the United Kingdom.<sup>15</sup>

International aid plays a pivotal role in Mozambique's economy and in balancing its external accounts. Official development assistance (ODA) finances more than half of the government expenditure. In recent years approximately 19 donors have been providing direct budget support to Mozambique; these are led by the United Kingdom, the World Bank, the European Commission and Sweden. While in the short term international donor support remains strong, at 14.2 per cent for 2008, this is scheduled to decrease in the medium term, for example to 12 per cent by 2010. On the expenditure side, the government plans to boost investment in the priority sectors of education, health, agriculture, infrastructure and governance.

Mozambique has established itself in recent years as one of the leading foreign direct investment (FDI) recipient countries in Southern and Eastern Africa. Leading investor's countries are South Africa, the United Kingdom, Portugal and Japan. In terms of infrastructure, the rehabilitation of the internal transport system has been target as a priority for the transport sector through roads and coastal shipping.

A second Poverty Reduction Strategy Paper (PARPA) was introduced in 2007 with the fundamental objectives of economic growth and poverty reduction. The incidence of poverty is gradually declining from 54 per cent in 2003 to 45 per cent in 2009. The strategy places great emphasis on entrepreneurial initiative and private sector growth as the driving force of economic and social development.

Tourism is increasingly being recognized as a valuable source of long-term growth and a key role for Mozambique's development strategy. To a certain extent, it appears that investment in the sector has matched these high expectations. Since 1995, investments projects worth over \$1.8 billion (USD) have been approved by the Investment Promotion Centre, being equal in value terms to 14 per cent of all approved investments<sup>16</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, visual

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<sup>12</sup> Ministry of Industry and Trade (2007). *Industrial Policy and Strategy*,

<sup>13</sup> IMF (2008b).

<sup>14</sup> IPEX and INA.

<sup>15</sup> IPEX and INA.

<sup>16</sup> The contribution of tourism in Mozambique, present and future by Sam Jones (MPD) and Hanifa Ibrahim (MPD), discussion paper, January 2008.

arts, 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.

## PART 2. PROJECT CONTEXT

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 will 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 creative industries, 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 services, with economic and cultural 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 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 the creative economy rely on its capacity to improve competitiveness and to help countries to generate jobs and revenues. While the range of skills and specific cultural features of a country are preconditions for successful expansion of the sector, creativity can be a crucial element in their economic integration in the global economy. Creativity is a strategic asset that can offer a comparative advantage in the globalizing economy 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 by 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>17</sup>.

Noteworthy policies and project policies 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 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

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<sup>17</sup> Strengthening the Creative Industries in five selected African, Caribbean and Pacific countries, project document, Annex 1, description of action.

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>18</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 production 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 is no "one size fits all" model 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 to 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 investments by the state or local structures and engaging other partners from the culture sector, especially those involved in fostering 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 remain key partners and facilitators in the design of the policy framework for this sector.

The economic importance of culture in the development of ACP countries was clearly stressed in the Cotonou Agreement, in particular in Article 27<sup>19</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 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.

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

<sup>19</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)

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 area and this was endorsed by the Declaration on the Promotion of ACP Cultures and Cultural Industries. The ACP Group confirmed its 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>20</sup> between the ACP region and the European Community, complementary actions to regional economic integration and trade are to be considered. It is a sector 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.

## 2.1 THE MILLENIUM DEVELOPMENT GOALS

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 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<sup>21</sup>. A 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>22</sup>.

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<sup>20</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.

<sup>21</sup> Creative Economy Report 2010 by UNCTAD/UNDP.

<sup>22</sup> The Creative Economy Report 2010: A feasible development option. UNDP/UNCTAD. For further information on the MDGs please refer to page 33.



## 2.2 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. For ethical trade to be sustainable, producers are advised to focus on innovation, and not only to seek out low-cost solutions. 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, UNCTAD has been spreading the message that 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>23</sup>.

## 2.3 MOZAMBIQUE AGENDA 2025

The Action Plan for the Reduction of Absolute Poverty (PRS) or "Plano de Ação para a Redução da Pobreza Absoluta (PARPA) for 2006-2009, outlines the strategy to achieve the country's development goals (MDGs) and with the broad objectives of the agenda 2025. PARPA II was intended to reduce poverty from 54 per cent to 45 per cent by 2009<sup>24</sup>. PARPA II was acknowledged as the operational plan for the Government's Five Year Programme, Mozambique's National Development Plan. Specifically, the PARPA II stresses the need to improve the business environment and the financial sector in order to promote private sector growth. It identifies actions to strengthen the judicial system, reform the labor code, promote rural development and increase investment in infrastructure. It focuses on three pillars: i) governance, ii) human capital, and iii) economic development. It also tackles HIV/AIDS, gender, natural disasters, science and technology, rural development, food security and nutrition, and demining as key cross-cutting issues.

There is an Observatório de Pobreza (OP) which was established by the Government in 2003 as a consultative forum for discussion of poverty reduction issues. The OP is facilitating regular dialogue between the Government and stakeholders on development objectives and poverty issues. For example, the OP met regularly to provide inputs for the preparation of the PARPA II<sup>25</sup>. In this context, the creative economy could be added as a sector that can also contribute to poverty alleviation in Mozambique.

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<sup>23</sup> The Creative Economy Report 2010: a feasible development option. Chap 1.3.4 Sustainable development, page 26 and Creativity and Biodiversity: a win-win solution, page 66.

<sup>24</sup> Mozambique Poverty Observatory and the Programme Aid Partnership.

<sup>25</sup> **Agenda 2025**, the PARPA II, the Five-Year Program for 2005-09 and the 2006 PES are broadly in line with the MDGs, World Bank.

## PART 3. CREATIVE INDUSTRIES POLICY REVIEW

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

It is important to understand the interface between creativity, culture, economics and technology, for the articulation of the development strategies of the twenty-first century. 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 developed countries. It 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.

The creative industries are a fast-growing economic sector holding great potential for developing countries, which often have rich cultural traditions expressed in the form of arts, music, dance, literature, films and other forms of creative talent, thanks to an affluent cultural heritage and traditional knowledge. According to UNCTAD, the creative industries are among the most dynamic sectors of the world economy and in international trade, but the large majority of developing countries are not yet able to harness the potential of their creative economies for creating jobs, revenues and export earnings.<sup>26</sup>

As per the Creative Economy Report 2010, as a result of the financial crisis and the global recession in 2008, global trade declined 12 per cent. However, world trade of creative goods and services continued its expansion, reaching \$592 billion and reflecting an annual growth rate of 14 per cent during the period 2002-2008.<sup>27</sup>

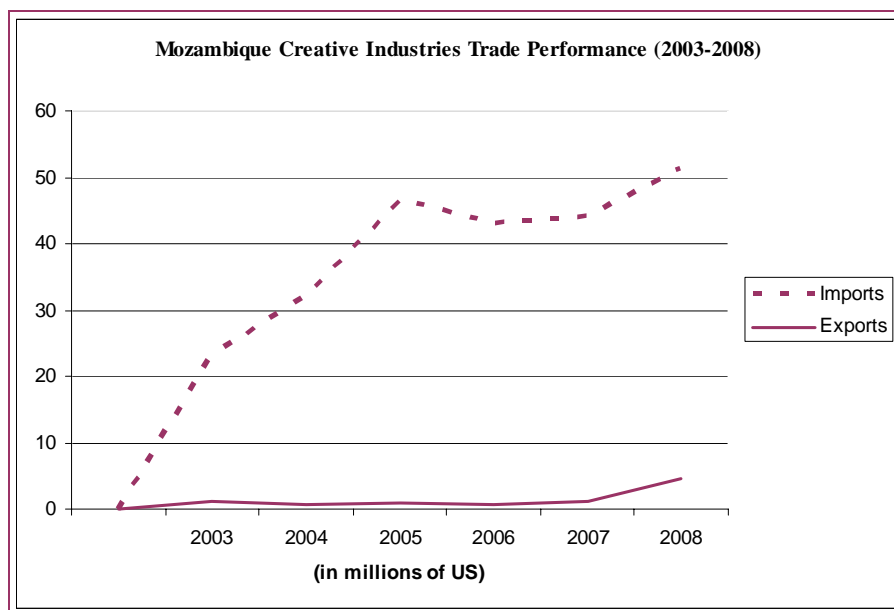
Africa, however, is not yet benefiting from its creative economy to accelerate development. For the moment, the creative industries in the continent are relatively small and very fragmented. According to available official statistics, Mozambique exports of creative goods although small increased fast in recent years and were estimated at around \$4.5 million in 2008<sup>28</sup>, compared to less than \$1 million in 2005, as shown in chart 1. The trade aspect of the creative industries will be further elaborated in subsequent sections.

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<sup>26</sup> See UNCTAD (2008a).

<sup>27</sup> The Creative Economy Report 2010: a feasible development option. UNDP/UNCTAD. UNCTAD/DITC/TAB/2010.

<sup>28</sup> UNCTAD Global Database on Creative Goods and Services, [www.unctad.org/creative-programme](http://www.unctad.org/creative-programme)

**Chart 1: Mozambique Creative Industry Trade Performance, 2003-2008**

Source: UNCTAD global database on the creative economy

### 3.1 INSTITUTIONAL FRAMEWORK AROUND THE CREATIVE ECONOMY

Since independence in 1975, the Government of Mozambique has always given culture a key role in its official discourse. While years of civil war and political and economic strife have eroded much of the country, there is still an underlying cultural basis on which Mozambique can build.

In fact, the first cultural act of the new independent government in 1975 was to create a Cinema Institute.<sup>29</sup> The Mozambican-born film director Ruy Guerra returned to Mozambique following independence to help plan the film industry. World-renowned film-makers like Jean Rouch and Jean-Luc Godard were invited to the country to carry out training and help develop national cinema policies. It is not only in the cinema sector that Mozambique had begun to cultivate a strong local culture. The country has also made its mark internationally in the areas of visual arts especially wood sculptures, as well as in literature and poetry. For example, the intricate wood carvings of the Makonde art coming from the northern parts of the country are well known throughout the world by those involved in the market of African visual arts, just as the name of Malangatana<sup>30</sup> enjoys wide recognition as a vibrant expression of African contemporary art.

In literary circles, for example, José Craveirinha was awarded the Premio Camões in 1991, the world's highest honour for lusophone literature. He was considered several times for the Nobel Prize for Literature. In 2003, President Chissano declared Craveirinha a “national hero” of Mozambique. More recently, the work of the renowned Mozambican writer Mia Couto is gaining wider recognition nationally and internationally.

The government recently launched an export promotion campaign called “Made in Mozambique”<sup>31</sup>. This campaign has been directed at the more classic industries without any focus on the creative sectors. While the economic rationale behind such a campaign is clear, underlying it is also the

<sup>29</sup> Information based on discussions with Camillo de Sousa. Maputo, 3 September 2008.

<sup>30</sup> Valente Malangatana Ngwenya, is one of the most famous artists from Mozambique, his art – work, paintings, sculptures, ceramics – has been exhibited in many countries around the world. He continues to influence new generations of African plastic artists. In 1997 he was named UNESCO Artist for Peace.

<sup>31</sup> An initiative of the Ministry of Tourism to promote the image of Mozambique as an attractive African tourist destination, September 2008.

acknowledgement of the importance of cultivating aspects of national culture, pride and self-esteem. It is noteworthy however, that in an official speech in 2008, the President recognized the importance of the cultural industries for the development of the country<sup>32</sup> It could be expected that in the near future, the products of Mozambican creativity will also soon be seen abroad as “Made in Mozambique”.

**Figure 5: Art crafts from the market in Maputo**



Furthermore, Mozambique is a favoured country by international donors. There are various internationally funded programmes currently in place in the country, including projects in the area of the creative industries. These projects are complementary with this ACP/EC/ILO/UNCTAD/UNESCO multi-agency project to enhance the creative economy. These projects have the benefit of reinforcing each others’ objectives and strengthening the overall effectiveness of results. Three ongoing projects are especially noteworthy and should be linked with this current project:

1. “Joint Programme on Strengthening Culture and Creative Industries and Inclusive Policies in Mozambique” (MDG-F) (UNDP/Spain MDG Achievement Fund)

The MDG-F Joint Programme is based on the United Nations Development Assistance Framework for Mozambique and contributes to the implementation of the National Poverty Reduction Strategy Papers (PRSP) and the *Plano de Ação para a Redução da Pobreza Absoluta, 2006–2009 (PARPA II)*<sup>33</sup>, the government’s five-year plan, the Strategic Plan for Education and Culture 2006–2011 and the Employment and Vocational Training Strategy. The programme is part of the “One UN” process in Mozambique and aims at “promoting cultural and creative industries’ contribution to social and economic development in Mozambique through strengthening the policy strategy and legal and regulatory frameworks as well as access to quality data on the sector, its importance and development challenges”.<sup>34</sup> In its first component, UNESCO, ILO and the International Trade Centre (ITC) set out to promote the cultural and creative industries’ contribution to social and economic development. In the second component the United Nations Food and Agriculture Organization (FAO), UNESCO, the United Nations High Commissioner for Refugees (UNHCR) and the United Nations Population Fund (UNFPA) will work jointly to ensure inclusion of social and cultural aspects in development policies and strategies. A central element of the programme is building the capacity of the national and local partners to ensure the sustainability of results.

2. “Development of Cultural Institutions of Mozambique” 2006–2009 (UNESCO) The second ongoing project of relevance to the ACP/ILO/UNCTAD/UNESCO project is the “Development of Cultural Institutions of Mozambique” (2006–2009) being implemented by UNESCO. It is mainly focussed on museums and monuments and on the promotion of art and creativity. Its activities include

<sup>32</sup> Information based on discussions with Pedro Pimenta, Maputo, 2 September 2008.

<sup>33</sup> Action Plan for Reducing Absolute Poverty.

<sup>34</sup> MDG-F 2008 document: 4.

strengthening museums (accessibility, quality improvements, promotional materials, etc.), addressing problems of preservation and promotion of cultural heritage and training cultural professionals. The project is also concerned with re-empowering the existing *casas da cultura* (cultural houses).<sup>35</sup>

### 3. “Capacity-Building for Professionals, Managers and Administrators of the Cultural Programme at the Ministry of Education and Culture” 2006–2009 (UNESCO)

The third directly relevant project is also being implemented by UNESCO and is entitled “Capacity-Building for Professionals, Managers and Administrators of the Cultural Programme at the Ministry of Education and Culture” (2006–2009). Its aim is to strengthen the capacity of government officials in the management and administration of the culture programmes at the central, provincial and district levels and to improve communication between the different sectors of culture, at the Ministry of Education and Culture: national directorates, provincial directorates, district directorates and cultural institutions, and to develop capacities in the identification, planning, implementing, administrating, monitoring, evaluating and reporting on cultural projects.<sup>36</sup>

Cooperation and coordination among the different activities within the scope of these projects has already been discussed.<sup>37</sup> The ACP/EC/ILO/UNCTAD/UNESCO project distinguishes itself from the others primarily because it focuses on areas that are not covered by the other projects, such as the crafts and music sectors, developing cultural tourism and elaborating the national language policy. This multi-agency pilot project also distinguishes itself because it will include support for the formulation of inter-ministerial policies, the reinforcement of institutional mechanisms and capacity-building primarily at the national governmental level and it also moves beyond the government realm, including associations, private sector, culture professionals and artists.

Finally, because of the multi-sectoral nature of the creative industries, this project will tackle economic, social and cultural issues simultaneously. It is clear that other ongoing programmes in the country can also be considered complementary, albeit indirectly. For example, an Italian-funded project supports the development of the National Statistics System and a the Dutch cooperation project with IPEX promotes capacity-building and identifying and strengthening exports, within which crafts and home decor have been identified as a priority sector. The Norwegian Agency for Development Cooperation also has an ongoing project that deals with the promotion of intangible heritage. All these projects are evidence of the growing role of international cooperation in enhancing the role of culture and the creative industries for the development of Mozambique.

There have been several variants to the official positioning of culture within the government over the years: 1975–1983 Ministry of Culture and Education; 1983–1987 State Secretary for Culture; 1987–1992 Ministry of Culture; 1992–1996 Ministry of Culture and Youth; 1996–2000 Ministry of Culture, Youth and Sports; and 2000–2005 Ministry of Culture. Since 2005, culture has been under the auspices of the Ministry of Education and Culture (MEC).

Like many other LDCs, development efforts in Mozambique do not include culture among the priority sectors in the country. In recent years there has been some encouraging progress in terms of integrating culture into the country strategic development thinking. The Agenda 2025, the government’s five-year plan 2005–2009 and the PRSP (PARPA II) all describe culture as an important contributor to the country’s human, social and economic development. However this recognition has not yet been translated into concrete budgetary changes in the government or the MEC budget. Nonetheless, within the framework of formulation of the sectoral strategic plans (PARPA II) the government has developed and approved a strategic plan for culture (PEEC) for the period from 2006–

<sup>35</sup> UNESCO (2006–2009b).

<sup>36</sup> UNESCO (2006–2009a): 4.

<sup>37</sup> Discussed at the inter-agency meeting between the lead agencies for the joint programme (Maputo UNESCO office) and the ILO/UNESCO/UNCTAD group. Maputo, 4 September 2008.

2011,<sup>38</sup> which commits it to various policy revisions and aims to emphasize the role of culture in the country's development.<sup>39</sup>

The government has been active in supporting the development of culture and creative enterprise in myriad ways. To begin with, the National Song and Dance Company of Mozambique (CNCD), the National Film and Audiovisual Institute (INAC), the National Museum of Art, the National Fund for Arts and Culture (FUNDAC) and the National Institute for Books and Discs (INLD) are under the tutelage of the MEC. These institutions are, for the most part, in need of serious rehabilitation at all levels, ranging from infrastructural aspects to professional capacity-building.

Various organizations and associations in different sectors have been created by the government. Under the patronage of the ministry, an amateur group of dancers, musicians, actors and storytellers was created in 1976. In 1983 the group turned professional and was named the CNCD.

The government also initiated the creation of the Association of Mozambican Musicians (AMMO). The AMMO held its first general assembly, after almost 20 years of relative inactivity, in September 2008, with the aim to revive the association and to elect a new secretary-general and board.

According to discussions with local stakeholders, the Department of Culture is called upon to invest much of its human capacity to organize public events and festivities, which is time diverted from focusing on the real needs of the sector itself. It is clear for all involved that there should be more focus on strategy and policymaking and in particular the implementation of those policies.

The Ministry of Youth and Sport runs a crafts project called Mozarte.

**Action:** The current institutional framework for the administration of cultural policy and its impact on creative industries could be enhanced to facilitate concerted policies with greater socio-economic impact over the short and long term. It could be useful to introduce a mechanism to facilitate a multi-disciplinary approach and inter-ministerial actions towards a broader creative economy strategy. This could be done, for example, through the establishment of an empowered Inter-ministerial Steering Committee on Creative Economy, as a standing coordinating body to play a key role in shaping inter-ministerial decisions involving government officials from all the relevant ministries and institutions. Such a committee would also interact with key stakeholders from professional associations of the creative sector, to develop and put in place appropriate and more effective public policies for enhancing the creative industries, as a strategic component of Mozambique's economic development agenda.

The implementation of this action is likely to reinforce the current structure and allow for more articulated and effective policy actions.

### 3.1.1 CULTURAL POLICY

The Strategic Plan for Culture was elaborated taking into account the recommendations of the First National Conference on Culture (July 2003), the Agenda 2005 and the Cultural Policy of Mozambique and its implementation strategy. The plan takes into consideration a number of issues that were not addressed in the 1997 Cultural Policy of Mozambique and which are relevant for this project, notably, that of strengthening the economic contribution of the culture sector for the development of Mozambique, enhancing capacity and infrastructure in the sector and improving cooperation between the different stakeholders.<sup>40</sup>

The strategic plan points out seven core problems for the development of the cultural sectors in Mozambique: (a) competent and skilled manpower; (b) lack of cultural infrastructure and facilities

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<sup>38</sup> República de Moçambique, Ministério da Educação e Cultura (2006). The Strategic Plan refers to the English translation (first draft and unofficial) of the PEEC.

<sup>39</sup> MDG-F: 6.

<sup>40</sup> Republic of Mozambique, MEC (2006): 9.

(equipment and materials); (c) limitations of the government and need for private sector mobilization; (d) information, data and documentation on the sector; (e) barriers to competitiveness for cultural stakeholders; (f) provision of the required legal and regulatory frameworks, which is lacking in some areas or weak in terms of enforcement; (g) streamline the activities of various cultural agencies.<sup>41</sup>

The strategic plan also points out 10 major institutional weaknesses associated with the sector: (a) poor perception of culture among senior public officials; (b) poor infrastructural capacity and poor human capacity to manage existing infrastructure; (c) lack of a comprehensive national system for data collection, documentation, storage, dissemination and statistics and information, especially on the economic impact of culture; (d) inadequate integration of culture into the economic and social sectors and into the school curricula; (e) absence of a comprehensive national language policy; (f) inadequate dissemination of policies, legislation and regulations related to culture, to enhance better understanding of their value to stakeholders; (g) poor institutional capacity to monitor and evaluate policies, strategies, programmes and projects contributing to weak delivery; (h) lack of appropriate managerial, technical and professional capacity and competence among cultural managers, artists and producers thus reducing their ability to be competitive; (i) lack of linkages and networking among institutions; and (j) excessive dependence on the government by cultural practitioners.<sup>42</sup>

These points can be substantiated based on the current research. On the last point it is worth pointing out that the encounters with professionals of the various cultural sectors did not lead to the impression that there was an excessive dependence on government, rather that there were many motivated professionals who clearly had to be dynamic in their own right in order to achieve the success they already had, but that there was an overall interest in seeing some structural and systematic government engagement and encouragement for the creative industries.

The government's six priorities for the development of the creative industries are clearly identified in the strategic plan. It is worth reiterating the strategic priorities and the specific objectives set out in the PEEC that are directly pertinent to UNCTAD's role in this project.

Strategic priority 2: Promote activities within the culture sector that generate income;<sup>43</sup>

Strategic objective 3: Elaborate and enact the appropriate legislation to provide fiscal incentives to artists, cultural producers and the corporate sector as a way of encouraging the development of cultural industries;

Strategic objective 4: Promote the commercial exploitation of local cultural productions and artistic creations;

Strategic objective 5: Strengthen (copyright) enforcement regimes to protect the interests and rights of artists and cultural practitioners;

Strategic objective 6: Improve access to quality data on the economic importance of the culture sector;

Strategic priority 4: Develop and strengthen the capacity and infrastructure of the culture sector;<sup>44</sup>

Strategic objective 1: Develop and strengthen both institutional and human capacity in the culture sector;

Strategic objective 2: Expand and improve the network of cultural infrastructure;

<sup>41</sup> Republic of Mozambique, MEC (2006): 4.

<sup>42</sup> Republic of Mozambique, MEC (2006): 5.

<sup>43</sup> Republic of Mozambique, MEC (2006): 17–19.

<sup>44</sup> Republic of Mozambique, MEC (2006): 23–24.

Strategic objective 3: Activate and update the information management system for the culture sector;

Strategic objective 4: Review and update the national policy framework for culture;

Strategic priority 5: Strengthen the partnerships between the various stakeholders in the field of culture;<sup>45</sup>

Strategic objective 1: Create an “arm’s length” body to ensure ongoing dialogue and exchange between the stakeholders and the government;

Strategic objective 2: Create an enabling environment for encouraging and enhancing participation of potential partners in the field of culture;

Strategic objective 3: Promote and support professional cultural associations and community-based organization.

**Action:** Implement this strategic plan for culture. A clear implementation mechanism indicating the time frame and resources allocation should accompany the strategic plan. Through this project, the implementing agencies can support the priorities and objectives identified in the strategic plan. They are in line with the objectives of the project to assist the government for enhancing the creative capacities in the country. UNCTAD will be working closely with the government at macro and micro levels, by providing policy advice and capacity-building for government officials to facilitate policy formulation for the development of the creative industries and its interactions with the overall economy.

**Action:** The idea of holding the Second National Conference on Culture in 2009 to promote inter alia awareness about the economic and development potential of the creative industries was a timely initiative. This event was held in Maputo on 14–15 May 2009 bringing together about 500 participants from all provinces. The conference provided a platform for open debates about the current situation and ways to move forward. UNCTAD was invited by the MEC to address the conference on the potential of the creative industries in international markets and the challenges and opportunities for Mozambique. The presentation attracted great interest and generated a lively debate. It was a good opportunity to emphasize the importance of the linkages between cultural, economical, social and technological aspects to enhance the creative sector in the country. Debates about the interface between tourism, the role of the media and creative industries were very useful to facilitate better understanding about the growing importance of the creative economy in overall development strategies. UNCTAD took advantage of the event to interact with high officials from the MEC on how this multi-agency project can effectively contribute in the process of revision, adoption and implementation of the Mozambique’s Strategic Cultural Policy.<sup>46</sup>

It is noteworthy that the government has put in place a decentralization programme worth 7 million Mtn (\$300,000) that is directed toward developing the districts. The emphasis is on food and agriculture whereas cultural and creative entrepreneurship are not prioritized.<sup>47</sup>

**Action:** It would be timely to include the creative industries among the priorities, since the creative sector has a potentially positive impact for revitalizing socio-economic growth in rural areas, generating employment and so contributing to better gender balance and poverty reduction.

Another dimension is that the creative industries can be a catalyst to support government efforts to further integrate Mozambique into the world economy, by increasing the competitiveness of its creative goods and services in global markets, while at same time promoting job creation, social

<sup>45</sup> Republic of Mozambique, MEC (2006): 25.

<sup>46</sup> See presentaion on “Política Cultural de Moçambique e Estratégia de sua Implementação”, Dra. Sonia, Ministério da Educação e Cultura, May 2009.

<sup>47</sup> Directorate of International Relations, MIC, Maputo, 9 September 2008.



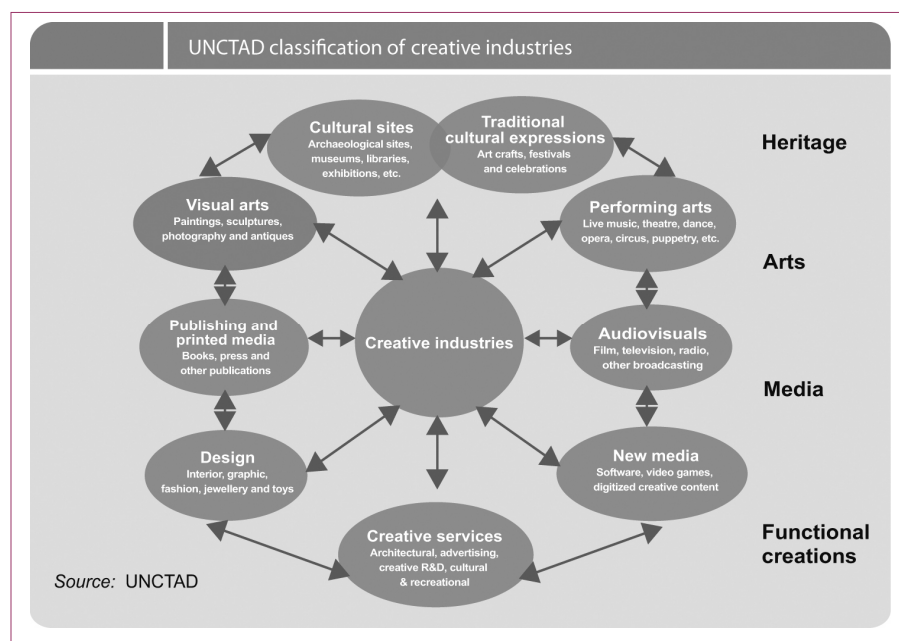
inclusion and cultural diversity. According to UNCTAD, the creative economy deals with a set of knowledge-based economic activities with a development dimension and cross-cutting linkages at the macro and micro levels with the overall economy.

The creative industries have significant potential for development on a wide scope, since they result in tangible goods or intangible services able to generate revenues through trade and intellectual property rights (IPRs), if appropriate policies are in place. It should be noted that although many countries use the terms “cultural industries” and “creative industries” interchangeably, the concept of the creative industries is broader than the traditional notions of the cultural sector, which are seen mainly from the public sector perspective.

The creative industries comprise the cycles of creation, production and distribution of goods and services with creative content, cultural and economic value and market objectives. In this regard, the creative industries have been classified by UNCTAD to include creative goods and services related to heritage, arts, media and functional creations, with subsectors identified in each of these categories,<sup>48</sup> as shown in figure 6. It deals with the interplay of various creative sectors starting from the most traditional like art crafts and cultural festivities to more technology-intensive sectors such as audiovisuals, to higher value-added creative services like architecture, advertising and digital services.

In this regard, it should be noted that the term “creative industries” emerged in the 1990s, broadening the scope of cultural industries beyond the arts, and marking a shift in the approach to potential commercial activities that until recently were regarded predominantly in non-economic terms.<sup>49</sup>

**Figure 6. UNCTAD classification of creative industries**



**Action:** It is recommended to enlarge the scope of the traditional cultural industries by adding new services-oriented and technology-intensive creative sectors along the lines indicated above. There are several classifications; this one was designed by UNCTAD taking into account the current and potential interests of developing countries.

<sup>48</sup> Reference is made to the UNCTAD’s definition and classification of the creative industries and the creative economy, elaborated in 2006 by the Creative Economy Programme. This classification is also presented UNCTAD/UNDP (2008): 14.

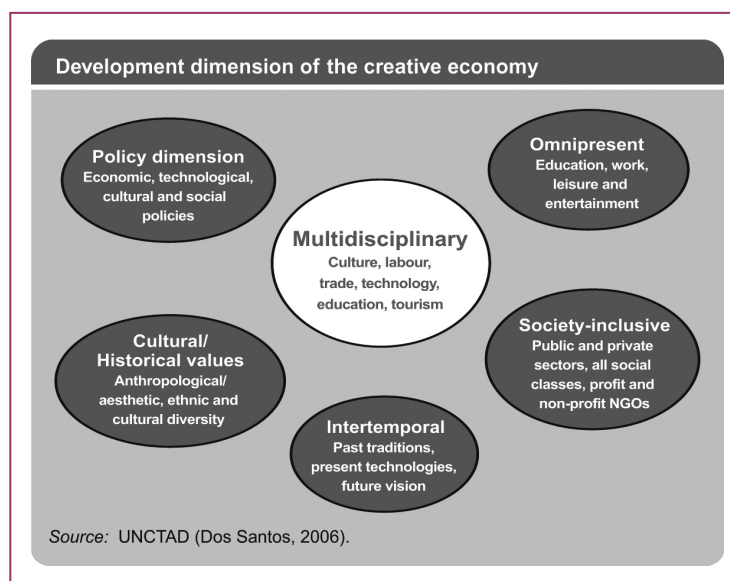
<sup>49</sup> See UNCTAD (2008a).

A key component of the development dimension of the creative economy is that it greatly contributes towards the achievement of the Millennium Development Goals, particular in the following areas:

- (a) *Eradication of extreme poverty*, by generating employment and income, particularly for creative workers from small communities and rural areas;
- (b) *Gender balance*, by providing equal opportunities for women;
- (c) *Social inclusion*, particularly of the youth living in less advantaged areas;
- (d) *Education and access to new information and communication technologies*;
- (e) *Global partnerships*, by cooperation inside and across countries involving the public and private sectors as well as international cooperation and civil society.

Given the multi-disciplinary nature of the creative economy, policymaking should not be confined to a single ministry or government department, but involve a number of relevant ministries such as culture and education, industry and trade, labour, science and technology, communications, tourism, finance, youth, planning and foreign affairs. Moreover, to be effective, the process should be participatory involving multi-stakeholders not only from the government but also from the private sector, professional associations, artists and the non-profit civil society.<sup>50</sup> Figure 7 underlines the key characteristics of the creative economy, which extend to almost all areas of government policy, calling for integrated inter-ministerial policy responses.

**Figure 7. The development dimension of the creative economy**



**Action:** In order to articulate an institutional mechanism to shape policies for the creative economy, an initial step would be to organize a high-level policy dialogue to present and debate the main findings and policy actions put forward by this report. This forum would provide the occasion to engage policymakers and some key stakeholders to harmonize views and increase understanding on this innovative approach. This action would be followed by, or optimally done in conjunction with, a commitment from the government to support the implementation of the plan of action proposed by the

<sup>50</sup> UNCTAD/UNDP (2008): 203.

three United Nations agencies. This procedure would pave the way for the setting up of the Creative Economy Inter-ministerial Committee, as a standing body.

### 3.1.2 FINANCING MECHANISMS

As mentioned earlier, the official budget allocated to culture is insignificant as in many other developing countries. In 2008, the budget for education accounted for 2.25 per cent of the national budget, while the cultural sector had only 0.03 per cent. Interestingly, for 2009 the budgetary allocation for education increased to 8 per cent but the cultural sector received only 0.3 per cent. This means that for the total allocation for the Ministry of Education and Culture, education accounted for 96.4 per cent of the budget while culture had received 3.6 per cent.<sup>51</sup> Education is undoubtedly a key priority; however culture also deserves more funds. According to the directives under consideration at the cultural policy, other sources of financing should be envisaged for the cultural activities, including grants from the FUNDAC and incentives from the Law of Protection of Heritage, as well as from the involvement of the private sector through sponsorships and corporate social responsibility schemes.

At present, the banking system of Mozambique has three micro-financing banks<sup>52</sup> and five credit unions. Banking and micro-finance activities are subject to the banking law.<sup>53</sup> However, the government does not have any specific public funding programmes in place to support the creative industries. It does provide periodic support through various activities. For example, the MEC organizes an annual Festival of Culture and a Festival of Traditional Song and Music. Competitions are held throughout the different districts and regions of the country and the winners go to compete at the national level. The winners receive a monetary prize. The MEC also gives out awards once a year to distinguished artists who receive monetary prizes.

**Action:** A Creative Industries Fund, either sector-specific, or for the entire creative industries should be established. The fund could be financed through a variety of both public and private sources. For example, broadcasters, internet service providers, and satellite TV should pay a tax to supply the fund. Government could make straight contributions or use a fund matching system. Contributions could come through the modification of the sponsorship law.

Many of the skills and professions linked to the creative economy are not recognized in business terms, thus making access to funding and or credit extremely difficult. The possibility of microcredit is particularly interesting in this sector. Microcredit schemes already exist in various forms in many countries; however the level of interest rates should not be abusive.

**Action:** Establish microfinance schemes to encourage the development of creative enterprises, in particular through public-private cooperation.

There is no specific policy on financing new enterprises in the creative sectors. Nevertheless, a strategic plan to reinforce small and medium-sized enterprises (SMEs) has been approved by the Ministry of Industry and Commerce (MIC) and is under implementation, which can have a positive impact for enhancing the creative industries.<sup>54</sup> Certain encouraging initiatives do exist. For example, GAPI is a financing institute for SMEs that promotes jobs through capacity-building. It is a PPP in which the government has a 30 per cent share. The board includes a government representative, a representative from civil society and one person from the Foundation for Community Development (funded by Graça Machel). They are involved in microcredit and they try to establish a link with capacity-building and financing. GAPI facilitates the creation of associations, facilitates business development and assists in microfinance management, legislation for associations and for businesses. It also provides training for local trainers and managers. In the context of this project, GAPI will be

<sup>51</sup> During the Second National Conference on Culture, there were lively debates about the financing of culture. The information above was provided in the paper “Financiamento da Cultura: Desafios e Oportunidades” by Salomão Julio Manhiça, May 2009.

<sup>52</sup> Socremo-Banco de Microfinanças; Novo Banco and Banco Oportunidade de Mozambique.

<sup>53</sup> See Law No. 15/99, November 1999.

<sup>54</sup> MIC, Maputo, 4 September 2008.

involved in capacity-building in cooperation with ILO. GAPI has already worked successfully with ILO on previous training projects.

### 3.1.3 ORGANIZATION OF THE PROFESSIONAL SECTOR

In terms of the way that the professionals within the various sectors have organized themselves, one can note that the associative structures in place are quite weak and need to be reinforced. There are three main organizations: (a) the musicians' association (AMMO); (b) the Association of Mozambican Writers (AEMO); and (c) the Association for Filmmakers (AMOCINE). There are also many smaller associations throughout all sectors. However, the high degree of fragmentation of these three creative industries does not provide the capacity to make effective changes in the sectors.

These main associations are well aware of their weakness and voiced their priority needs: (a) financial; (b) capacity-building, notably learning how to manage the artistic enterprises and creative business in more professional ways, and getting a better idea of how they can better protect and manage their intellectual property rights; (c) social security improvements, remuneration of their activities; and (d) their effectiveness as a group working for improvements for their respective sector, vis-à-vis the government.

In 2008, a national meeting for culture was initiated by artists and professionals active in the culture sector. A three-day meeting was planned to discuss the way to move Mozambique forward in this respect. Their aim was to write a manifesto and to help instigate the drafting and approval of a Law for Artists. Artists and creative professionals would like to create an organization that could regroup all those working in the sector. As in most countries, the creative economy is very fragmented and there is a need to work together to be able to push any legislation forward in the area of the arts and media. One of the subjects of discussion according to an instigator of the project was the necessity of finding public-private partnerships (PPPs) and of finding ways of getting investment from the domestic or foreign private sector into the creative industries and not just rely on donor funding.<sup>55</sup>

**Action:** The creation of a National Creative Economy Centre could be a response to enhancing creative capacities and facilitate sharing of information and knowledge, networking, strategic alliances, capacity-building activities involving artists, creative entrepreneurs, academia, NGOs, etc.

**Action:** The organization of networking is encouraged to facilitate contacts within the artistic and business communities and reinforce skills and techniques.

## 3.2 REGULATORY FRAMEWORK AND LEGISLATION

There is some legislation in place with respect to the creative industries in general or specific sectors but implementation is needed. A useful initiative by the Ministry of Education and Culture in this regard was to publish a document in 2007, listing all the legislation related to culture in Mozambique.<sup>56</sup>

The *Lei do Mecenato* (Law 4/94) was adopted in September 1994, but no regulatory framework has been adapted for an effective implementation of this law so far.

**Action:** Establish a regulatory framework conducive to the implementation of this law, including the fiscal treatment foreseen for the public or private sector institutions willing to support activities in the area of arts, literature, science, culture and social actions.

A law (Law 10/88) was adopted in December 1988 to regulate the legal protection of material and immaterial assets to preserve the cultural heritage of Mozambique.

There is also a decree (10/81) of July 1981, defining the rules and criteria for the commercialization of artworks, art crafts, furniture and precious wood objects, precious and semi-precious gemstones, ivory

<sup>55</sup> Discussions with Naguib, well-known plastic artist, Maputo, September 2008.

<sup>56</sup> See Ministry of Education and Culture (2007).

and special skins, with the aim to avoid abuse and unscrupulous commerce and exports of those protected creative and heritage goods.

Within the cinema and audio-visual sector there are discussions of creating a cinema law. In October 2008 an agreement was established with Brazil, signed during President Lula's visit to Mozambique, which foresees some assistance from Brazil on this issue.<sup>57</sup>

**Action:** The completion of the cinema law is highly encouraged. In this regard, UNCTAD can act as facilitator to promote further cooperation between Mozambique and Brazil concerning the formulation of the audio-visual law; the Brazilian experience can be a useful model to be adapted for the case of Mozambique. The fact that both countries have signed the Cooperation Agreement, within the context of the Community of Portuguese-Speaking Countries, in the area of film and audio-visuals, is an important element.<sup>58</sup> UNESCO can also play a role in assisting the government in the process of adopting and implementing the law, also taking into account some successful experiences in other developing countries such as Colombia and Cuba.

**Action:** A broadcasting law should be put in place. As regards television and radio broadcasting, an attempt is apparently being made to draft a law. At present there are no rules to regulate television programmes. This lack of a regulatory framework results in serious difficulties for local producers of creative content who have to compete with well-established international players and an invasion of imported television programmes (films and soap operas). There is very little space allocated for national content. This is an area in which UNESCO is willing to provide technical assistance.

### 3.2.1 COMPETITION POLICY

The government developed a general policy on competition in 2007,<sup>59</sup> but the regulatory framework for its implementation is still under consideration by the Assembly. The Ministry of Industry and Commerce has started to prepare a Competition Law, which was expected to be completed at the end of 2008.<sup>60</sup> The law is expected to regulate several areas of relevance for the creative industries, such as abuse of dominant positions, agreements between companies and concentrations that impede competition.

**Action:** Encourage the completion of Competition Law that is being prepared. Encourage the creation of a Competition Authority and the implementation and regulation of the upcoming Competition Law. UNCTAD has been providing assistance to governments in this area.

**Action:** Particular attention should be given to regulatory practices and implementation processes of existing and upcoming legislation for the creative industries, particularly the audio-visual sector.

**Action:** Strengthen the legal and regulatory framework for the creation of cooperative and cultural enterprises, including the registration of such entities, their constitutions and their labour policies.

**Action:** Institutional restructuring should also be prioritized.

### 3.2.2 EMPLOYMENT CONDITIONS

In Mozambique as in most countries, developing and developed alike, it is very difficult to assess the volume of employment generated from the creative industries. National statistical offices are having great difficulty in quantifying employment in this area and in delimiting it. ILO and UNESCO have been examining issues related to definitions, delimitation of sectors, classifications of occupations,

<sup>57</sup> Discussions with Pedro Pimenta, well-known film producer, November 2008.

<sup>58</sup> It is noteworthy that Mozambique hosted the First Exhibition of Films and Audiovisuals from CPLP countries. This event took place from 18–25 June 2009. Films from the nine lusophone countries were screened (35mm and DVD), along with debates and workshops, etc. The event was organized under the auspices of the Ministry of Education and Culture, by AMOCINE and AMOVIDEO.

<sup>59</sup> Resolution No 37/2002, November 2007.

<sup>60</sup> Discussions with the Chefe do Departamento de Politica Comercial, MIC. Maputo, September 2008.

methodologies for data collection and working with national statistical offices to improve the quality of data as regards employment in the various segments of the creative industries. This work is an ongoing process.

Moreover, in most developing countries, the majority of artists and creative entrepreneurs are still part of an informal sector, and as such they do not benefit from the usual rights and obligations covered by labour regulations.

Social and economic security for art workers and creators is essential to change the traditional misperception that creative activities are transitory or recreational activities or hobbies. Comprehensive national legislation is required to regulate creative activities and their relationship with employers in order to set up a social and economic security scheme for these workers. Why is this important? Many artistic workers must become entrepreneurs out of necessity; they are the first in setting up small enterprises, the first who are interested in looking for clients and contracts, and in creating job and income opportunities.

Furthermore, it is widely recognized that employment conditions for artists are often very precarious. 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, with limited or inexistent coverage for pension and medical schemes.<sup>61</sup>

**Action:** ILO has an established working relationship with the Ministry of Labour (MITRAB) and has been supporting government efforts to improve employment conditions. Special emphasis will be given in the context of this multi-agency project to strengthen the ministry's capacity for creating decent jobs and reinforcing creative capacities and entrepreneurship.

The ILO will be working in collaboration with the Institute for Employment and Professional Formation (INEFP) in this regard. During a meeting held in July 2009, both ILO and INEFP reached a consensus on the action plan main activities and included some additions, e.g. a study on the implication of the Employment and Vocational Training Strategy within the crafts sector, and the agreement that all activities linked to vocational training will be channelled through INEFP.<sup>62</sup>

It should be noted that a "Start Your Cultural Business" (SYCB) pilot training took place (in Maputo, from 24 to 28 August 2009). INEFP is the lead institute coordinating various technical as well as logistical issues, and this arrangement will be replicated in other provinces where the pilot is taking place (Inhambane and Nampula). This mode of working will be replicated in all the other activities, as it is likely to guarantee the sustainability of all the tools and approaches that will be introduced within the joint programme. The SYCB materials were adapted and translated under the EU-ACP programme, hence demonstrating a clear link of this multi-agency project and the MGD-F Culture and Creative Industries programme, to ensure complementarities and effectiveness.

Mozambique already has a structure of professional organizations in place, as described in the section above; a large number of creative workers are registered in their respective associations. This already provides a good basis for a categorization by size, type and employment in the creative sector, as a first step for the mapping of the creative industries at the national level. In this regard, the classification of occupational categories for the cultural and creative sectors is an important aspect.

### 3.3 INTELLECTUAL PROPERTY RIGHTS

In Mozambique, the industrial property code was approved by decree 18/99 of May 1999, as a new code to create conditions for technological development and to enable the transfer of knowledge and new technologies. It is applicable to signatory countries to the International Union for the Protection of

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<sup>61</sup> UNCTAD/UNDP (2008): Creative Economy Report, page 118.

<sup>62</sup> Information provided by the ILO Director in Mozambique to the UNCTAD secretariat in August 2009.

Industrial Property, and in full compliance with the Agreement on Trade-related Aspects of Intellectual Property (TRIPs) of the World Trade Organization.<sup>63</sup>

A copyright law exists in Mozambique (*Lei do Direito de Autor e Direitos Conexos Lei no. 4/2001 de 27 Fevereiro*).<sup>64</sup> It covers literary, artistic and scientific works; in addition, computer software is explicitly identified. The law covers the life of the author plus 70 years, while a term of 50 years applies for performers' rights and sound recordings, and 25 years for broadcast programmes. According to the law, the responsibility is on the injured party or his legal representative to initiate legal proceedings in defence of infringed rights.

**Action:** The existing copyright administration needs to be enabled. The legislation is in place; however its implementation needs to be revised.

The Associação Moçambicana de Autores (Mozambican Association of Authors) (SOMAS) was established in 1998 and has the responsibility of a collecting society. It is a private institute but a representative of the MEC, the Director of the INLD, is on the Executive Board. SOMA does not receive funds from the government but receives funding from Scandinavia. SOMA has two licenses and only collects from TV Mozambique and the Radio Mozambique. They collect a lump sum and do not receive statistics on how many times a film has been programmed or how many times a song was played on the radio.<sup>65</sup>

For the time being SOMAS only collects rights for the music industry. Since it began collecting, it has made three payments to local artists. Their average annual collection has been \$10,000. Only the two public institutions make the payments and just for the music sector. In recent years, the association had no real increase in the amount collected, although there was an increase in its membership. In consequence, members of the association receive a percentage of the overall collection, which is divided by the number of members and not relative to the programming of their work.

In November 2008, the Procuradoria General da Republica announced that more robust action on the part of the government against piracy and counterfeiting was needed.

**Action:** It is necessary to improve the functioning and the methodology used by SOMAS so that it can work more efficiently. It also needs more human resources and better computer systems. This is an area in which UNESCO could provide some assistance. In the context of the United Nations Development Assistance Framework project, the International Confederation of Societies of Authors and Composers (CISAC) is already providing some technical assistance to SOMAS.<sup>66</sup>

There is no provision in the law to oblige private users to make payments. The current lack of implementation of the legislation means that SOMAS is unable to collect from the private sector. For example, there are four other main private radio stations in Mozambique, in addition to many others throughout the country, but no agreements are signed with radio stations other than Radio Mozambique.

Many artists are currently registered in South Africa because there is no incentive to be registered in Mozambique.

**Action:** Encourage the creation of a national federation of collecting societies, which would regroup the different creative industries in a type of loose affiliation.

According to discussions with various artists, it became clear that many sell their rights outright according to the buy-out concept. For example, one usually sells the rights for an artistic work for a

<sup>63</sup> UNCTAD/International Chamber of Commerce (2001).

<sup>64</sup> See Ministério da Educação e Cultura (2007).

<sup>65</sup> Discussions with the Director of SOMAS, Maputo, 3 September 2008.

<sup>66</sup> When we visited SOMAS during the fact-finding mission, an international expert was working at SOMAS. The joint mission invited him to attend the stakeholders' meeting held in September 2008.

specific territory, for a specific time period, in a specific medium. Simply put, in concrete terms, that would mean selling the rights to a film to be shown in cinema theatres (as opposed to DVD, VoD or other rights), in Mozambique (as opposed to another country or region), for a period of five years, for a specific sum of money. Some artists end up by selling all the rights for 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 become more aware of their possibilities and can help them negotiate better deals so that they can earn income from their professional and creative activities.

**Action:** It is necessary to improve the functioning and the methodology used by SOMAS so that the association is able to carry out its functions more efficiently and effectively.

Furthermore, according to discussions with stakeholders, the main priorities identified in the area of rights were: (a) funding; (b) awareness and understanding of regulations; and (c) the necessity of going into the field to do training on a broad scale.

**Action:** Capacity training and awareness of rights issues for professionals in the creative sectors and for civil society is a priority issue. The advisory services of a legal expert in IPR issues could be provided to the associations from time to time, to assist the artists in negotiating their contracts, particularly those oriented towards global markets. In the scope of this project, assistance from UNESCO in association with the World Intellectual Property Organization (WIPO) could be envisaged to tackle this problem.

Of particular concern to creative entrepreneurs are issues related to copyright and trademarks and the necessity to strengthen the ability of creators to learn about their rights. Ideally, each province should appoint a person responsible for providing guidance and training in contractual negotiations and marketing issues.

**Action:** An education training package of 2–3 days could be implemented in the artistic community at the province level to deal with topics such as training and personnel development, work and environmental protection, waste disposal, basic trade techniques, government supporting institutions and how to access international markets.

### 3.4 FISCAL POLICY

At present there are no specific fiscal benefits to encourage the creative industries, although there is a decree that grants fiscal and customs incentives for investors in the tourism sector. As presented at the *Creative Economy Report*, sources of finance for businesses in the creative industries may arise from public sector funding programmes of various sorts, private sector investment and PPPs involving joint contributions and responsibilities.<sup>67</sup>

As mentioned above (3.2) a sponsorship law (*Lei do Mecenato*) exists in Mozambique, however it does not respond to the current needs of the cultural and creative sectors, nor does it contribute to nurture the sector. The government apparently gives a “tax rebate” or tax exemption if a company sponsors a cultural event. However, there is a lack of transparency of how the process of sponsorship actually functions, or if it is currently controlled in such a manner that it contributes to the growth of the local creative sectors. Companies such as MCEL, Vodacom and beer breweries do currently sponsor cultural events.

**Action:** The government could impose some conditions on the sponsorship process in order to enhance the creative sector. For example, in Germany a 20 per cent tax rebate in the film sector is available; however, the rebate depends on fulfilling specific conditions. For example, the primary conditions are that a certain amount of the overall spending must be in the country, a German cinema distribution deal must be confirmed with a minimum number of copies, a number of local technicians must be used, a certain amount of the filming must take place in the country, etc. By linking the rebate

<sup>67</sup> For further reference, see UNCTAD/UNDP (2008): 177, 178.



to specific conditions the local sectors can benefit. South Africa also has a substantial tax rebate scheme that could be used as a reference for Mozambique to develop its own.

**Action:** Another variation to this sponsorship law might be that part of the tax exemption could go into a public fund and not just “back” to the investor.<sup>68</sup>

Information available from local musicians indicates that, at present, there is 40 per cent tax on DVD imports, comprised of 25 per cent import duty plus value added tax (VAT). Musical instruments are normally taxed at 80 per cent plus VAT because they are considered a luxury item. Technical equipment is taxed at 40 per cent plus VAT.<sup>69</sup>

It is possible, under special circumstances, to obtain a reduction of import duties/taxes on musical instruments.<sup>70</sup> However, the process is apparently lengthy and not sufficiently transparent.

**Action:** Reducing import taxes on the import of materials and services used in the creative sectors should be envisaged.

**Action:** The government is encouraged to enact legislation to provide fiscal incentives to artists, cultural producers and the corporate sector involved in the creative sector.

**Action:** The government is encouraged to provide tax exemptions and reductions on duties and levies on the import of equipment used in creative enterprise.

**Action:** The government is encouraged to provide tax exemptions of the import of books, for at least a specified period of time.

**Action:** The government is encouraged to revise the tax rebates for the corporate sponsorship of the arts and culture with a view of greater and sustainable benefits to the local creative sectors.

### 3.5. INVESTMENT

Mozambique has been attracting higher inflows of FDI but mainly for its mining mega projects. The Investment Code continues to provide protection for investors, and the Investment Promotion Centre remains responsible for dealing with all investment procedures and for promoting Mozambique as a destination. A consolidated Code of Fiscal Benefits is operational, and both national and foreign direct investors can access to it if registered. At present, Mozambique has minimum investment thresholds of \$5,000 for national investment and \$50,000 for foreign investment.<sup>71</sup> The Foreign direct investment; net inflows (% of GDP) in Mozambique was reported at 5.96 in 2008, according to the World Bank.

Efforts have been made to improve the investment climate but investors both foreign and domestic still face bureaucratic and infrastructural constraints. It should be pointed out however that a new Commercial Code governing the establishment of companies has improved legal procedures. For instance, the registration process for new companies has been modernized and a simplified licence procedure is now in place.

A comprehensive model of investment is necessary for the sustainability of the creative industries. There is a simultaneous call by professionals for both government and investors in the creative industries to establish some funding mechanisms, as well as for the provision and encouragement of private sector investment and opportunities. Funding mechanisms that combine public and private sources, for example through industry transfers, are discussed below.

<sup>68</sup> Suggestion made by local film professionals.

<sup>69</sup> *Pauta Aduaneira* (customs and duty tax scheme established by the government).

<sup>70</sup> President of the AMMO, Maputo, 3 September 2008.

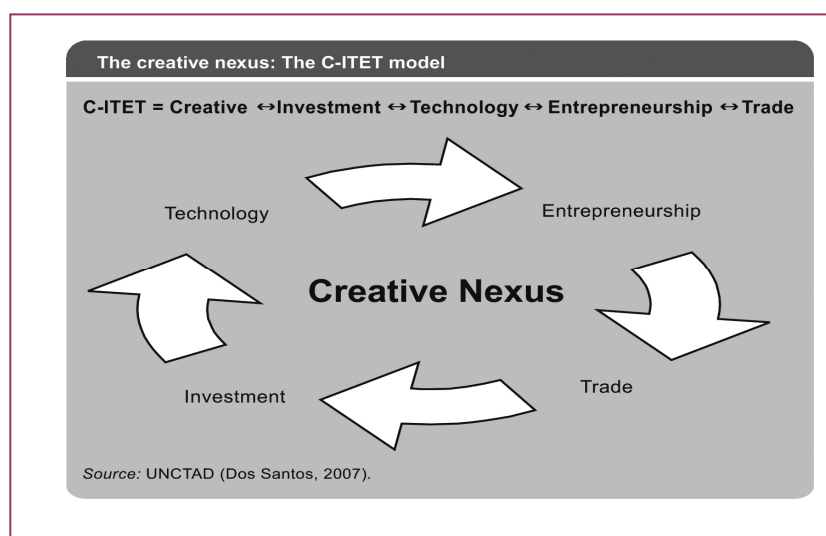
<sup>71</sup> Centro de Promoção de Investimentos – CPI, online information.

Public-private schemes can be especially useful to harness the creative industries. Measures to facilitate such a process can include public guarantees that can be combined with a lending credit line from a local bank. In addition, entrepreneurs can be made more “bankable” by lowering operation costs by streamlining the credit/risk assessment procedure.

Public-private sector dialogue is maintained primarily through the Confederation of Economic Associations, which has been active in improving the business and investment environment. The creative industries, particularly the audio-visual, film and video industry also deserve special attention.

In this regard, UNCTAD proposes the “creative nexus” as a long-term strategy to stimulate private investment to attract new technologies, promote entrepreneurship and set the basis for an export-led strategy for the creative industries. In this scheme, effective public policies would induce a virtual circle as shown in figure 8 below.

**Figure 8. The Creative Nexus CITET Model**



### 3.6 ENTREPRENEURSHIP AND SME DEVELOPMENT

According to a survey carried out by the government in 2004, more than 28,474 SMEs were registered in the country, with 129,225 employees, SMEs make up 89.5 per cent of the total number of enterprises in the country.<sup>72</sup> About 2,621 were medium enterprises, while 25,853 were small enterprises. In the SME sector, commerce is the dominant activity accounting for 57 per cent of the total number of SME sector as a whole, followed by the hotel industry with 20 per cent.<sup>73</sup>

There is evidence that a SME development strategy is already in place and it also incorporates a microenterprise development plan. However, these are still considered as having very little or no impact on the economy. The government is in the process of creating an Institute for SME Development, which needs to be approved by the Cabinet. This institute is designed to provide services and facilitate the establishment of small enterprises, by speeding up the process, facilitating licenses, avoiding redundancies, etc. This initiative could certainly be a catalytic force and an effective way to attract the informal creative sector into the existing formal structures.

Nonetheless, the MIC proposed that a specific strategy should be developed for the creative sectors and that it should not necessarily be mixed with the other areas. Such a strategy could be defined jointly with the MEC and the Ministry of Tourism, for example.<sup>74</sup> The MIC pointed out the

<sup>72</sup> See Ministry of Industry and Trade (2007).

<sup>73</sup> Data from the Censo de Empresas 2004, INE.

<sup>74</sup> Direccao Nacional de Industria, MIC, Maputo, 4 September 2008.

necessity to focus on implementation and encouraged the creation of an Inter-Ministerial Committee but stressed that it would be important to include all the stakeholders involved and not just the ministries, but that the question of leadership would have to be very clear in such a situation. There was general agreement that it is necessary to build more awareness about the creative industries concept and specific results-oriented initiatives. The MIC expressed its willingness to take the initiative and move forward on these issues especially since they are involved in financing and their role is to improve access to international markets and they are also responsible for IPR issues.

**Action:** Support clusters of SMEs, enabling interconnected creative industries and the cooperation of services providers, the sharing of facilities and know-how, as well as seeking financing together and providing collective guarantees.

Working together means that confidence can be increased between creative industries and financial institutions and thus make it easier to obtain loans and reduce costs for materials and equipment. Such experiences are relatively undeveloped in Africa and are concentrated in neighbouring countries such as Kenya, Nigeria, South Africa and the United Republic of Tanzania.<sup>75</sup>

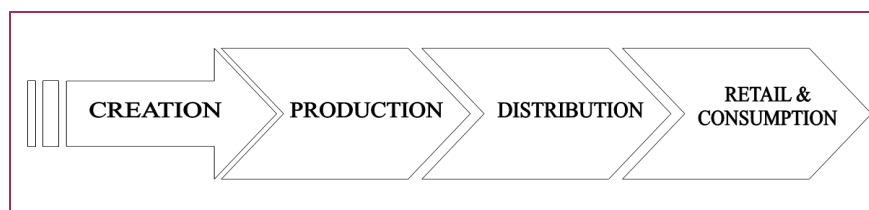
**Action:** Support non-financial institutions in the area of technology, skill development and marketing.

If creative SMEs are to become vibrant and contribute to the economy, they need to be provided with adequate support that enhances their capacities, for example in the preparation of sound commercial business plans to be submitted for microfinancing facilities in commercial banks. Many projects are rejected because of poor business plans despite the commercial viability of the project.

**Action:** A key component of this project is the capacity-building and training activities to be provided by ILO, to assist artists and creators to establish their creative business in a sustainable way and improve their entrepreneurial skills.

The encouragement of SMEs is crucial to the development of the creative industries in developing countries. Many creative enterprises are micro-sized, and in many cases a sole independent artist or creator covers all the various stages of the supply chain, from creation to the market.<sup>76</sup>

### Figure 9. Creative industry value chain



Source: UNCTAD/UNDP (2008).

In all the steps of the value chain, from the creative process to retail and consumption, secondary economic fallouts are expected with the creation of employment. For example, creative industries generate work opportunities for logistic and transport companies, when selling the creative products, as well bringing economic spillovers to other sectors, for example, by sourcing cotton fabric for the production of some art crafts, fashion, etc.

<sup>75</sup> Financing SMEs in Africa, OECD Development Centre, Issue No. 7, 2005.

<sup>76</sup> UNCTAD/UNDP (2008): 69, 183.

### 3.6.1 A SUCCESSFUL CASE OF CREATIVE FASHION IN AFRICA

#### **Alphadi, the Fashion Caravan**

Seidnally Sidhamed, alias Alphadi, was born on 1 June 1957 to trader parents in Timbuktu, Mali. One of nine children, in Niger he grew up in the company of his siblings and liked to put makeup on his sisters and mother. He also studied the makeup of actresses in Hindu films. At a young age, this designer-to-be was already intrigued by everything that could enhance and better showcase feminine beauty. In Niger, however, fashion was taboo for boys.

While his father had envisaged that Alphadi would pursue a medical career or work in the family business, following graduation from high school, Alphadi went to Paris to study tourism. In this centre of fashion, he was able to attend fashion shows and he also took night courses at the Chardon Savard atelier. Once he had completed his studies, he accepted a director's position at the Ministry of Tourism in Niger, but he still had a passion for fashion. While working at the Ministry, he continued to perfect his fashion skills by receiving in Niger professors from Chardon Savard.

In 1985, two years after having decided to devote his life to fashion, he presented the haute couture fashion line that he had created at his first fashion show, which was held in the City of Light during the International Tourism Trade Show. From that time on, Alphadi has had many successes, including the Best African Designer Award from the Fédération Française de la couture et du prêt-à-porter in 1987. His fashion shows are familiar worldwide - in Abidjan, Brussels, New York, Niamey, Paris, Quebec, Tokyo and Washington. In 1999, he expanded his label by creating a line of sportswear called Alphadi Bis. With Wrangler, he also created Alphadi Jeans, and 2000 saw the launch of l'Air d'Alphadi, the first perfume by an African couturier.

After twenty years of a career in fashion, with fashion shows organized all over the world, boutiques in Africa, Europe and the United States and, most importantly, an internationally respected brand, Alphadi is one of the most well-known African designers from the continent. Warm, very affable and experienced, this artist is ever ready to talk about his field. Inspired by the rich traditions and colours of Africa, Alphadi "firmly believes that fashion and culture are the industries that can lift Africa to the ranks of prosperous nations".

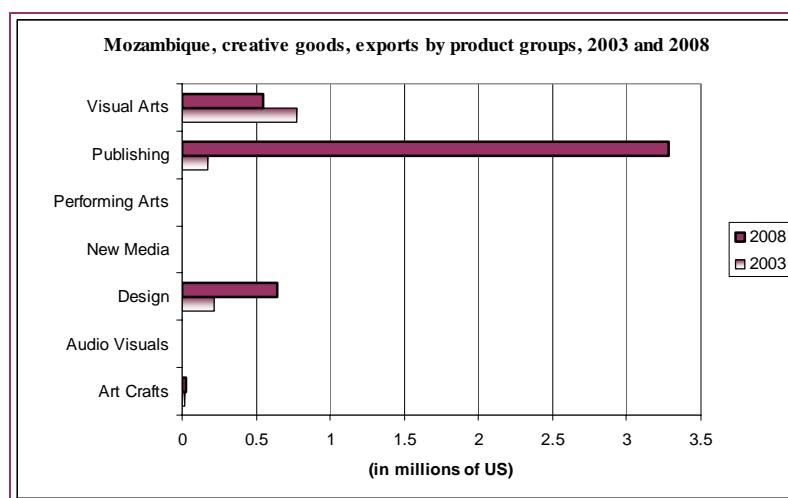
Alphadi, Paris

### 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. The same applies for the totality of ACP countries, which includes 78 countries in the African, the Caribbean and Pacific regions. Together, their exports of creative goods amounted only to \$1.5 billion in 2008<sup>77</sup>. Undoubtedly, given the abundance of creative talents in the region, the creative potential of these countries is extremely underutilized.

Mozambique has a weak presence in world markets, even if its exports of creative goods are increasing. According to official figures, the value of exports of creative goods amounted to less than \$1 million in 2005 and reached \$4.5 million in 2008<sup>78</sup>. Imports, however, increased from \$46.6 million in 2005 to \$51.3 million in 2008. Efforts should be made to redress this big trade deficit by enhancing creative capacities and improving the export performance of the most competitive creative sectors.

**Chart 2. Mozambique creative goods exports by product groups, 2003-2008**



Source: UNCTAD global database on the creative economy

Furthermore, at present the cultural and creative industries are not on the priority list of the MIC.<sup>79</sup> The MIC pointed out that even though the creative industries are not listed as priorities in Mozambique's industrial policy that does not mean that they are not important for the government.<sup>80</sup> Indeed, the MIC noted a situation pertaining to Makonde art, which is being made in Mozambique but being exported internationally by a neighbouring country. The government is aware of this situation and wants to address it. The MIC indicated that they are trying to introduce the notion of clusters in the country, having one village or region specializing in a particular creative product or activity.

**Action:** The MIC pointed out that incorporating the creative industries into their national policies and strategies is only a matter of reviewing the country National Plan.

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 GATS (General Agreement on Trade in Services), TRIPS, TRIMS (Trade-related Investment Measures), competition policies, trade efficiency and most importantly, special and differential treatment for developing countries. For

<sup>77</sup> The data provided by national governments to the database of the United Nations seem to present some inconsistencies, mainly in the publishing sector. In the context of this project, efforts will be made to improve the quality and coverage of the data on creative industries.

<sup>78</sup> Creative Economy Report 2010: a feasible development option. UNCTAD/UNDP-UNCTAD/DITC/TAB/2010/3.

<sup>79</sup> Republic of Mozambique, Ministry of Industry, Trade and Tourism (1999) and *Boletim da República*, I Série, Número 26, 7 de Julho de 1998.

<sup>80</sup> Direcção Nacional de Indústria, MIC, Maputo, 4 September 2008.

instance, the temporary access for artists from developing countries to supply services in major markets, the so-called Mode 4 at World Trade Organization (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, Mozambique, like other LDCs, has duty-free, quota-free access into the European Union under the “Everything but Arms” (EBA) Initiative for LDCs introduced in 2001. It should be noted however that EBA (GSP plus) 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. The 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 benefit potentially from the preferential duty-free treatment.

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

The Economic Partnership Agreement under negotiation between the European Union and Southern African Development Community (SADC) countries may represent new real opportunities for achieving market access of creative goods and services on a permanent basis.

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

**Chart 3. Mozambique main destinations of creative goods exports, 2008**



Source: UNCTAD global database on the creative economy

### 3.7.1 SOUTH-SOUTH TRADE

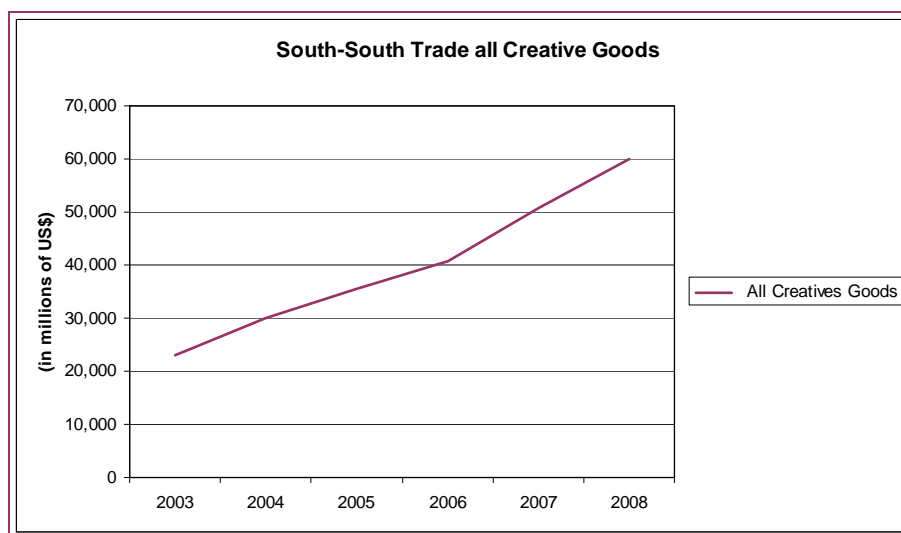
In recent years, UNCTAD trade analysis has provided evidence of new market opportunities in the South. The region's emerging trading and economic dynamism has created a new set of relationships among North and South economies. Between 2002 and 2008, the South's exports of all goods to the world rose 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 export 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.

Mozambique 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 4 South-South Trade of all creative goods, 2003-2008**



*Source: UNCTAD global database on the creative economy*

### 3.7.2 REGIONAL AND INTERNATIONAL AGREEMENTS

Mozambique's foreign policy is largely focused on South Africa, the SADC, the African Union, the New Partnership for Africa's Development (NEPAD), Western donors and Portugal. The government has entered regional, multilateral, bilateral and preferential trade agreements.

The country is involved in the development of the cultural and creative industries at a regional level through the SADC and the Nairobi Plan of Action for Cultural Industries in Africa (December 2005) and NEPAD priorities.

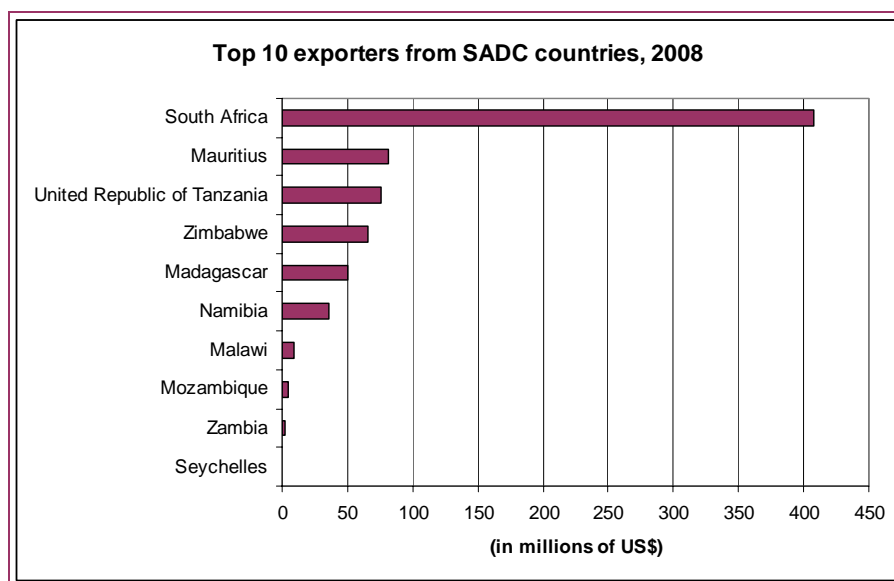
The Mozambican Strategic Plan for Culture (PEEC) was written in compliance with the Charter for the Cultural Renaissance of Africa of the African Union.<sup>81</sup> The PEEC was also written in coherence with the Nairobi Plan of Action for Cultural Industries in Africa, in particular, the objectives to strengthen the economic contribution of creative sectors to the country's development.<sup>82</sup> Mozambique has also taken into account the SADC protocol on culture in the development of the creative industries. The NEPAD culture priorities are also incorporated into the PEEC. However, its focus with respect to the creative sectors is on indigenous knowledge.

<sup>81</sup> Republic of Mozambique, MEC: 10.

<sup>82</sup> Republic of Mozambique, MEC: 11.

In December 1999, the Mozambican Council of Ministers approved the SADC Trade Protocol.

**Chart 5: Top 10 Exporters of creative goods from SADC countries, 2008**



*Source: UNCTAD global database on the creative economy*

The protocol creates a free trade zone among more than 200 million consumers in the SADC region. Implementation of the protocol began in 2002 and the free trade area of SADC has been in force since 1 January 2008, so that in principle the vast majority of goods produced in other SADC countries can enter Mozambique free of customs duties.<sup>83</sup> However, Mozambique's country-specific zero-tariff goal is currently 2015.

The language barrier for Mozambique within the SADC region creates some impediments to the common development of the creative sectors; however, the effective use of the free trade protocol is a priority. Strengthening ties within the Community of Portuguese-Speaking Countries is important for Mozambique in terms of the export of potential creative products that are language-linked like literature, films, videos and television programmes.

Mozambique has also been a member of the African Regional Intellectual Property Organization since May 2000.

**Action:** With respect to existing bilateral trade agreements, Mozambique could give more attention to including the creative sectors within the scope of the agreements. Relevant ministries could identify specific areas and the possibility of including the creative industries in agreements could be explored.<sup>84</sup> This is a concrete example of an area in which concerted inter-ministerial action is invaluable.

Mozambique joined the WTO on 26 August 1995 and is a signatory of the TRIPS Agreement. The country is a signatory of the following preferential trade agreements: the Trade Protocol of SADC (see above under the regional context), the Cotonou Agreement, the EBA, the African Growth and Opportunity Act (AGOA) and the European Business Assistance Scheme (EBAS).

Political relations between Mozambique and the European Union (EU) are established on both bilateral and regional levels. The legal framework for EU cooperation was based on the Cotonou Agreement signed in June 2000 between the EU and the 78 ACP countries, which expired in 2007. At present, negotiations are under way for the conclusion of an Economic Partnership Agreement

<sup>83</sup> AfDB/OECD (2008): 467.

<sup>84</sup> Directorate of International Relations, MIC, Maputo, 9 September 2008.



between SADC and the EU. Mozambique has preferential trade agreements allowing duty-free access to the EU markets, as mentioned above.

Mozambique also has a preferential trade agreement through the United States AGOA, which gives preferential access to United States markets for several products including textiles and clothing. The AGOA includes special treatment for some cultural goods going to the United States, exempting them from import taxes under certain conditions. It is not reciprocal.<sup>85</sup>

Mozambique is part of the EBAS, a grant fund that operates on a cost-sharing basis to encourage businesses' and intermediary organizations' (trade associations, chambers of commerce, etc.) finance expansion projects. The objective of EBAS is to reinforce the competitiveness of ACP enterprises. To achieve this, EBAS strives to promote the market for business consulting services by encouraging private enterprises and business associations to procure the services of outside professional consultants or service providers to improve their business performance. It provides up to 50 per cent of the costs of services facilitating an increase in competitiveness.

(i) International agreements in the area of culture: Mozambique has ratified the UNESCO Convention on the Protection of the World Cultural and Natural Heritage (1972).

It has begun the ratification process for the Means of Prohibiting the Illicit Import, Export, and Transfer of Ownership of Cultural Property (1970), the Convention for the Safeguarding of the Intangible Cultural Heritage (2003) and the Convention on the Protection and Promotion of the Diversity of Cultural Expressions (2005).

The ratification of these conventions is important for the development of creative industries in the country.

(ii) Memberships in international organizations: In 1996, Mozambique became a founding member and the first President of the Community of Portuguese-Speaking Countries and maintains close ties with all lusophone states.

Mozambique is a member of the Non-Aligned Movement and ranks among the moderate members of the African Bloc in the United Nations and other international organizations.

In 1994, the government became a full member of the Organization of the Islamic Conference, in part to broaden its base of international support but also to please the country's sizeable Muslim population.

Mozambique has observer status with the Commonwealth States and in the Organization Internationale de la Francophonie (OIF).

(iii) Membership in WIPO treaties: WIPO Convention since December 1996; Paris Convention (Industrial Property) since July 1998; PCT (patents) since May 2000; Madrid Agreement (International Registration of Marks) since October 1998; Madrid Protocol (International Registration of Marks) since October 1998; Nice Agreement (International Classification of Goods and Services) since January 2002.

According to the PEEC, Mozambique is planning on ratifying the Universal Copyright Convention (1971).

### 3.7.3 EXPORT PROMOTION

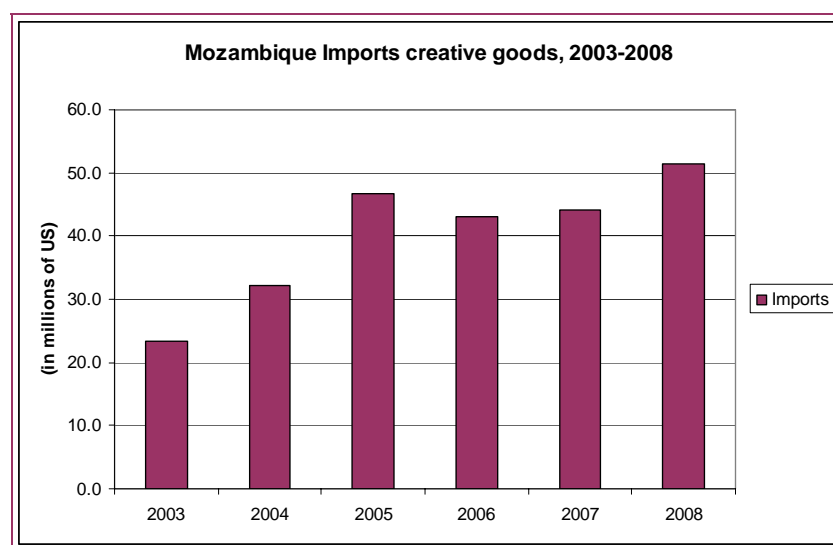
In terms of export promotion the government created the Institute for the Promotion of Exports (IPEX), which functions under the auspice of the MIC. IPEX is currently working on a national export strategy for the EU and is currently involved in a capacity-building programme "to train IPEX staff in

<sup>85</sup> National Directorate of Trade, MIC, Maputo, 9 September 2008.

identifying products in Mozambique that could be improved upon in terms of production, quality and market access issues to meet the market requirements of the European Union".<sup>86</sup>

The IPEX organization has included Mozambican handicrafts in a priority list: handicrafts that can be classified as home accessories (decorative items and household utensils made from wood) have been identified for their export potential. Part of the project includes the process of identifying partners in Europe and China. They are working together with the ITC on this project and the capacity-building programme for IPEX staff. There is another EU-funded project involving the United Nations Industrial Development Organization (UNIDO) and being implemented by IPEX, the customs authority and INOC (quality standards), which is designed to focus on trade facilitators, for example, implementing the idea of clusters. The focus sectors are currently in the process of being defined. IPEX is also currently working with UNCTAD on the Global Gap project.

**Chart 6. Mozambique imports of creative goods, 2003-2008**



Source: UNCTAD global database on the creative economy

### 3.7.4 TRADE FACILITATION

One concern pointed out by those involved in the creative sector is the slow clearance of goods through ports and customs offices. Inspection and paperwork for exports seemingly complicate shipping deadlines. Delays in VAT and other refunds owed to the private sector is a recurrent problem.

**Action:** As encouraged by the MIC, it is important to develop a specific strategy for the creative sectors that could be defined jointly with the MEC and the Ministry of Tourism with a focus on implementation.

**Action:** Encourage the expansion of the inter-ministerial committee that would also include all relevant related institutions in addition to the ministries.

**Action:** Take up the MIC suggestion that it could play a central role, given their involvement in financing of industry and in improving access to international markets.

**Action:** Trade-related capacity-building developed for government officials in the second stage could include the promotion of creative sectors into bilateral agreements.

<sup>86</sup> Mozambique Institute of Export Promotion. Pilot Projects: CBI Recommendation List and Rationale. BSOD IPEX Mozambique – EMM module. September 2008. Discussion with the Managing Director of IPEX. Maputo, 9 September 2008.

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

### 3.8 SERVICES SECTOR

Services are of critical importance of most economies in the SADC region<sup>87</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. Services exceeded 40 per cent of GDP in Mozambique. The construction sector accounts for 6.4 per cent of GDP (2006). The SADC region is a net importer of electricity. South Africa and Mozambique were the leading exporter and importer countries, together accounting for approximately 45 per cent and 39 per cent of total electricity trade in SADC respectively.<sup>88</sup>

Communication services are among the key services in Mozambique. However, teledensity remains very low at less than one fixed line per 100 persons and the subsector is marked by insufficient competition and high operating costs and charges. Most of the region's main (fixed) telephone lines are concentrated in just four of its 14 countries: Botswana, Namibia and South Africa account for approximately 80 per cent of all fixed lines in SADC. Radio and television services are State-owned in all SADC countries and access is now by digital satellite which allows for more universal coverage<sup>89</sup>.

The construction industry, which includes architecture, an important creative sector, continues to grow in Mozambique due to the rehabilitation and expansion of the road and rail network<sup>90</sup>.

The energy sector has been identified as a priority sector for investments in the national strategy for poverty alleviation. Less than 3 per cent of the population enjoys access to electricity. Energy is paramount for the infrastructure development needed to implement technological advances in the area of ICT tools and digital services, an important component for enhancing the creative economy.

In the last decade, financial services have been contracting. The banking sector is highly concentrated and comprised of eight commercial banks, all of which are majority foreign owned by Portugal and South Africa. The microfinance industry, which extends lending to rural areas, has started to grow. Similarly, access to capital is essential to stimulate the development of creative entrepreneurs which are mainly SMEs who require seed money to start up their activities.

Due to its location bordering the Mozambique Channel, the country is a natural transport hub for several of its neighbors (e.g. Malawi, Swaziland, Zambia and Zimbabwe).

#### 3.8.1 TOURISM

Mozambique is endowed with natural resources including beaches, exceptional fauna, flora and wildlife and a climate that provide it with enormous potential for tourism. The sector has attracted major investment and already constitutes one of the country's main exports.

However, development in the tourism sector is constrained by a lack of capacity and inefficiency in the supporting services sectors, such as telecommunications, finance and transport.<sup>91</sup> Tourism

<sup>87</sup> Mozambique is a member state of SADC.

<sup>88</sup> UNCTAD (2010: Towards SADC services Liberalization: Balancing Multiple Imperatives. 3 SADC priorities services sector, pag. 21.

<sup>89</sup> The South African Broadcasting Corporation (SABC) is the largest radio and television transmission company in the region, comprising 18 radio stations targeting a combine audience of over 20 million.

<sup>90</sup> This is done with donor funding from the World Bank and other organizations.

<sup>91</sup> Towards SADC Services Liberation: Balancing Multiple Imperatives, Tourism Sector, pag.66. UNCTAD, 2010.

contributed 3.4 per cent to the GDP of the region and was directly responsible for 1.75 million jobs in 2006<sup>92</sup>.

Mozambique has a wealth of natural tourism assets including 2,700 km of tropical coastline, wide sandy bays, coral reefs and 15 per cent of its land declared “protected area”. Over the centuries, the Portuguese, Arabic and African influences have fused together to create a uniquely Mozambican culture, reflected in architecture, cuisine, language, art and music. Today, Mozambique still represents a relatively untouched country.<sup>93</sup> Nevertheless, in 2007 the tourism sector attracted almost \$1 billion in FDI, mainly for the construction of luxury hotels. The country has three tourism zones: the south, the centre and the north, which offer a range of destinations for discovery tourism and eco-tourism. Progressively, efforts are being made to protect natural parks and reserves.

Within the strategy of the Plano Estratégico de Educação e Cultura, tourism appears to be a key sector for economic development for the preservation of the natural and cultural heritage of Mozambique. The planning for cultural tourism development should be articulated among the main actors in this market, the government, the local community and the private sector. It is also important to highlight the connection between tourism and the creative industries as an important source of employment and a vibrant asset for the attraction of tourism and investment in local communities. The production of creative goods and services such as cultural performances, films, music, books and art crafts should be seen as an integral part of the economic and social life as well as of the cultural identity of the country.

**Action:** Measures should be put in place to provide information and sensitization programmes to enable tourists and creative artists to be in more direct contact. For instance, this can be done through the organization of tourist groups visiting specific art crafts communities, where a real exchange of traditional knowledge takes place and the uniqueness of handmade techniques is displayed, traditional dances are performed, stories of cultural heritage can be shared, etc.

SMEs and microenterprises account for a significant share of tourism development in most developing countries, particularly in LDCs. The role of the creative industries should be recognized within the tourism infrastructure of the country (art crafts, festivals, celebrations, cultural sites, paintings, sculpture, live music, theater, dance, etc.). Accompanying national policies to sensitize creative industries about the potential linkages with the tourism sector are also desirable.

**Action:** Create greater synergies between the creative industries with the tourism sector.

**Figure 10: Art crafts from Mozambique**

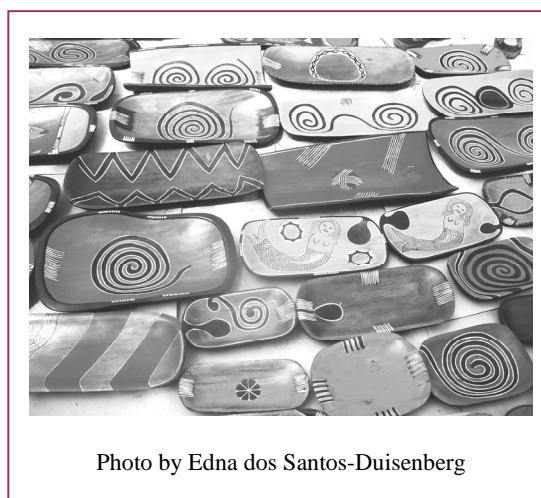


Photo by Edna dos Santos-Duisenberg

<sup>92</sup> Mfuno F (2008). Tourism Development in Southern Africa. The Official SADC Trade, Industry and Investment Review 2007/08, SADC.

<sup>93</sup> Mozambique Tourism Anchor Investment Programme.

### 3.8.2 AUDIOVISUAL SECTOR

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. The analysis of the audio-visual sector is further elaborated in chapter 4.

### 3.9 TECHNOLOGY AND CONNECTIVITY

The interface between technology, culture and economics is the essence of the creative economy. Information and communication technology (ICT) plays a key role for strengthening the creative industries, due to two phenomena: digitization and convergence. ICT is important as a creative product itself, expressed by the digitalized form of creative content in products like new media, software, video games and cartoons, or as an enabler of connectivity used as a tool for marketing and distribution of other creative products such as music, films, books and news, or creative services such as advertising and architecture.<sup>94</sup> Therefore, digital technologies have opened up huge opportunities to boost the potential of the creative industries in developing countries.

Internet connectivity in Mozambique is relatively low but growing quickly. According to UNCTAD's *Information Economy Report 2007–2008*, the number of internet users in Mozambique increased from 50,000 in 2002 to 178,000 in 2005; this means that it has more than tripled in three years. The number of mobile subscribers had also a vertiginous jump from around 255,000 in 2002 to 2.3 million in 2006. Prospects are that by 2011 Mozambique will be “wired” that is, fully covered through a digital network.

A number of initiatives are under implementation to put in place an infrastructure enabling the use of ICT tools and promote their use.<sup>95</sup> Among these initiatives, the Ministry of Science and Technology (MST) has set up community multimedia centres in various parts of the country, which could be likened in some cases to a “hole in the wall” that enables easy internet access in rural areas.<sup>96</sup> This project started in 2004 and is now active in 20 districts throughout the country.

The MST is clearly active in a number of areas that are relevant for the development of the creative industries and with a few linkages with their existing activities, not only in terms of ICTs but also in the area of innovation and research at the grass-roots level. In addition, the MST is also involved in the organization of the new School for the Arts, which the MEC is leading.

The MST noted that, along with the MEC and the MIC, they are part of inter-ministerial working group on IPRs and its potential for generating revenue. The strategy they are working on also includes the culture sector. The MST clearly sees the synergies between their work and the development of the creative industries.<sup>97</sup>

**Action:** Encourage the MST to expand their inter-ministerial cooperation to also cover the development of the creative industries. It would be advisable to expand this existing inter-ministerial mechanism with a broader mandate to deal with all cross-cutting issues related to the creative economy.

<sup>94</sup> Reference is made to chapter 7 of UNCTAD/UNDP (2008).

<sup>95</sup> Republic of Mozambique, Ministry of Science and Technology (2006)

<sup>96</sup> Ministry of Science and Technology, Maputo, 5 September 2008.

<sup>97</sup> Ministry of Science and Technology, Maputo, 5 September 2008.

The use of mobile phones in Africa is expanding at an extraordinary growth rate according to a recent special report on telecommunications in Africa.<sup>98</sup> There are more mobile phones being used than there are 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 an important future in Africa.

Even though Internet access in Mozambique, at this point in time, may not be significant, it will certainly continue to grow rapidly, as mentioned above. For the time being, radio remains the prime source of information for the majority of the Mozambican population.

**Action:** With regard to medium-term strategies, it is clear that creative content for the Internet, which is of interest to Mozambicans and Africans, should be a priority. Therefore digital content and design have a potential market in the growing number of users. This is linked with the promotion and development of creative content, which is at the basis of the film, audio-visual and new media areas of the creative sectors.

It is important to align the policies already identified in the fields of science, technology and innovation, particularly the strategic objectives that include the promotion of the use of ICT, as well as the promotion of grass-roots innovation and the use of science- and technology-based approaches by poor and disadvantaged communities,<sup>99</sup> in the context of a overall strategy to foster the creative economy in Mozambique.

### 3.10 EDUCATION AND TRAINING

The government itself has pointed out that the current situation in terms of arts education and training for professionals working in the cultural sectors does not meet the current needs of the country.<sup>100</sup>

In terms of higher education, there is a School of Communication and Arts at the Eduardo Mondlane University (UEM), which provides courses for music and theatre. The UEM also has a Faculty of Architecture and Planning. There is some training for fine arts teachers in drawing at the UEM and there is also a Pedagogic University of Mozambique.

At secondary education level there is the Escola Nacional de Artes Visuais, the Escola Nacional da Musica and the Escola Nacional de Dansa. Photography is taught at the Centro de Formação Fotografica in Maputo.

While its vocation is not training, AMOCINE does one or two short workshops per year, on the film and media sector, usually initiated by donor partners.

The Instituto Superior de Ciencias e Tecnologia de Moçambique (ISCTEM), a private higher education institution has just announced that, in partnership with the Universidade Nova de Lisboa, they will launch a two-year Masters programme in Communication and Cultural Management.

The Instituto Superior de Artes e Cultura (ISAC), was inaugurated by the Minister of Culture in September 2009 in Maputo. It is designed to provide higher level (graduate) education in the arts and culture. On the one hand, its aim is to train high-level creators and on the other hand, to provide training on cultural and arts management. The institute has started to offer both theoretical and practical education in arts and design. In its initial phase it will cover a limited number of sectors, namely the visual arts (painting and sculpture) and design (product design, fashion design and visual communication). As the institute grows, it plans to expand the number of creative sectors on which it will provide education.<sup>101</sup> The ISAC set up curricula that are compatible with the Bologna

<sup>98</sup> Ford (2008): 34.

<sup>99</sup> As listed in the Mozambique Science, Technology and Innovation Strategy prepared by the Ministry of Science and Technology and approved by the Council of Ministers in June 2006.

<sup>100</sup> República de Moçambique, Ministério da Educação e Cultura (2008): 1, "Fundamentação"

<sup>101</sup> MEC, Maputo, 3 September 2008.

Declaration<sup>102</sup> with a view to facilitate the recognition of studies in Europe and in all the Commonwealth countries.

**Action:** A specific project target is to contribute to the further development of the ISAC as soon as possible. The ISAC already counts with ninety (90) students and in early 2010, it has put in place a comprehensive curriculum, taking into account the multi-disciplinary nature of the creative economy, and the interface between cultural, economical, technological and social aspects. Areas related to cultural management and production, as well as specialized technical services for lightning, sound, co-editing of films, etc., should not be neglected. Possibilities for the creation of incubators and creative clusters could also be envisaged.

In June 2009, UNCTAD facilitated the initial contacts between the Director of ISAC and some professors from the Oslo National Academy of the Arts and the Royal Academy of Arts of the United Kingdom. The purpose was to explore opportunities for North–South partnerships and concrete initiatives for education, research and training in the area of design and functional creations in Mozambique.<sup>103</sup> This partnership is taking shape to assist ISAC, as the first higher education art and design school, to better formulate the curricula of its course and to network with other similar schools in Africa and elsewhere for the sharing of research and best practices.

Discussions with stakeholders indicated that there are various needs in the domain of education and training. They include:

- (a) Arts education from the primary level to the university level;
- (b) Capacity-building in terms of vocational training for artists who would like to improve their skills for contractual and IPR arrangements;
- (c) Capacity-building in terms of entrepreneurial skills and ITC tools for creative business;
- (d) Continuous learning in specific creative sectors (e.g. new techniques for music-making);
- (e) Capacity-building in terms of institution-building, policy formulation and implementation for policymakers.

**Action:** Education and training at all these levels need to be addressed. In the context of this project the ILO will provide capacity-building on entrepreneurial skills. UNESCO may provide some assistance in terms of vocational training and continuous learning for creators, artists and associations. On the basis of funds availability, UNCTAD intends to provide capacity-building in terms of institution-building and the regulatory framework for enhancing public policies, as well as on trade and investment-related issues for government officials.

It is imperative to invest in education and vocational training for the creative industries, including through private sector mobilization and initiatives. Support is needed not only to facilitate the start-up of creative enterprises but also to monitor quality control and develop a new attitude towards creative work in which the artists and artisans can feel proud of their native cultures and care for equipment and materials.

**Action:** Establish professional encounters and facilitate actions offering a variety of point of views but always keeping in mind what can be achieved and can remain as added value to the country. Encouraging a second language at secondary schools to facilitate trade and exchanges would also be useful.

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<sup>102</sup> The purpose of the **Bologna** Process is to create the European higher education area by making academic degree standards and quality assurance standards more comparable and compatible throughout Europe.

<sup>103</sup> UNCTAD organized a workshop in the context of the Europe-Africa Campus for Cultural Cooperation, held in Maputo in June 2009.

Education and training on IPR issues is a must, particularly on issues related to copyrights and trademarks. Artists and authors should know better what their rights are so that the value of the creative works is not underpriced. This training and information should not be restricted to the artists working in centres in the main cities, but should be spread throughout each province.

**Action:** A specific education package of 2–3 days free of charge could be target to creative workers and implemented in each province. Ideally, it should cover: training and human development; government supporting institutions; IPR basic information; basic trade techniques including market access; some knowledge of environment; and cultural protection.

### 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. The fashion industry 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 the economic ladder by using their creative talents in harmony with the best use of the nature, including the use of natural fibers and 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.

**Action:** A positive dialogue is needed to engage business and consumers to come together to conserve biodiversity. Throughout supply chains, partnerships among farmers, NGOs, and government are needed at a global scale. The eco-fashion, interior design and natural cosmetics industries in particular are booming sectors, providing jobs and export revenue from the sustainable use of biodiversity.

**Figure 11: Sustainable fashion show during the National Conference on Culture, Maputo, 2009**



Photo by Edna dos Santos-Duisenberg



### 3.12 DATA COLLECTION

The issue of the necessity of reliable statistics is ever-present in all reports and discussions about the creative industries. It is redundant to say that effective and useful data collection is necessary and 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>104</sup> In the case of Mozambique, the issue was pointed out by the Chairman of the High-level Policy Dialogue on Creative Industries, particularly as regards the lack of data regarding jobs in the creative industries and its impact in the overall economy.<sup>105</sup>

The Instituto Nacional de Estatística (National Statistics Institute) in Mozambique is actively collecting information.<sup>106</sup> It has a website on which data is posted and to some extent downloadable. Most notably, it has recently posted statistics in the domain of culture. Only a limited amount of information is available on the cinema, radio and television and museums. In the realm of cinema, limited statistics are available on the numbers of cinemas, seats, screenings and tickets sold in six provinces of Mozambique for the period 2004–2005. For radio and television, some statistics are available on the number of hours of public broadcasting and number of hours and types of programmes of public and private broadcasters for the period from 2003–2005. For museums, some statistics are available on the number of visitors to museums, according to gender and nationality (Mozambican or foreign).

The National Customs Authority also compiles statistics, although its accessibility seems problematic. Based on official sources, UNCTAD has compiled statistics on trade in the creative sectors, as presented in the annex of this study.<sup>107</sup> However, some figures for 2005 seem discrepant and need to be checked, as mentioned earlier. The importance of data collection to further enhance the creative industries cannot be overstated, as is evident from the *UNCTAD Creative Economy Report*.<sup>108</sup>

**Action:** Priorities need to be established on what data is collected, that is both quantitative and qualitative. At this stage, basic data that can be useful for policymaking and for an overview of the landscape and market of the creative industries should be a priority.

**Action:** Efforts to collect and compile data should be consolidated among the different public agencies. The MEC, the National Statistics Institute and also the MST, the MIC and the Customs Authority should consolidate forces on this issue. As the central organizing entity, the National Statistics Institute could include not only collection of statistics on culture but it could broaden its scope to a section on the creative sectors, which would include creative goods and services.

<sup>104</sup> UNCTAD and UNDP (2008). *Creative Economy Report 2008. The challenge of assessing the creative economy: towards informed policymaking*. UNCTAD/DITC/2008/2. UNCTAD and UNDP (2010): the Creative Economy Report 2010: a feasible development option". UNCTAD/DITC/TAB/2010/3

<sup>105</sup> As stated by the letter from H.E. the Ministry of Labour in Mozambique addressed to the United Nations Resident Coordinator, dated 17 August 2009.

<sup>106</sup> <http://www.ine.gov.mz/>

<sup>107</sup> See Annex I.

<sup>108</sup> UNCTAD/UNDP (2008).

## PART 4. SECTOR-SPECIFIC OVERVIEW

As mentioned in the introduction, this project pinpointed three possible sectors for action: the performing arts, the audio-visual and new media and publishing sector. The extent to which these previously identified sectors become the focus of the project activities obviously depends on the results of research on the ground and the assessment within each country. They must be coherent with the aim to provide the most optimal possibilities for enhancing the creative industries in the country in the short- and long-term perspectives. This section will look at the local situation in three pre-designated sectors and a number of additional sectors that are of relevance to the creative economy in Mozambique. It will also make suggestions regarding the priority sectors, as well as those with greater potential to generate employment and trade. From the trade perspective, the best performing sectors according to UNCTAD, in Mozambique are the creative goods from visual arts, art crafts and fashion.

### 4.1 PERFORMING ARTS

After independence the government was keen on promoting a revival of culture and became directly involved in promoting music and dance.

In 1978, the Ministry of Culture and Education organized a national dance festival that led to the establishment of a number of organizations. As mentioned above, a group of dancers, musicians, actors and storytellers was established in 1976 under the patronage of the Ministry. This group turned professional and in 1983 officially became Companhia Nacional de Canto e Dança (CNCD). The CNCD is based in Maputo but recruits the best dancers, musicians and performers from around the country. The company has 50 members in total. The CNCD has been and continues to be instrumental in promoting Mozambican culture around the world. Nimbu Productions is a similar organization that also stages productions, although it is not as famous internationally as the CNCD.

In terms of its human resources practices, an alarming aspect is the tendency towards more precariousness in the contracts, status and social benefits of the members of the CNCD. A labour law exists and applies to all employers in Mozambique,<sup>109</sup> regardless of type of company and covers all fields of activity in both the public and private sectors, so in practice performing artists should have the same rights as other employers.

Concerning the infrastructure, the theatre in which the CNCD works and rehearses needs renovation. The company is also currently going through restructuring and is trying to work on improving their marketing promotion schemes.

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<sup>109</sup> Labour law of 20 July 1998.

### Box 1. Companhia Nacional de Canto e Dança

The group originated with 20 young artists coming from different regions of the country that dedicated their free time to dancing and poetry. This group gave birth to the National Company of Dance and Songs. Today the group comprises 50 people including dancers, musicians, technicians, assistants and leaders from the professional sector. Performances are attended by 300,000 spectators. The National Company performs mainly cultural Mozambican traditional, popular dances. The search for existing cultural traditions within the country is another constant and obligatory component of the work undertaken by the company. The mission of the CNCD is to recover, preserve, value and disseminate culture, through its performances, in particular in the field of dance, music, songs, theatre and related activities. This way, the CNCD contributes to the civic education of the urban and rural population in key aspects of national and universal interest such as public health, national reconciliation, democracy, tolerance, preservation of the environment and others, crossing barriers of dance, music, ethnicity and language.



Source: Institutional Memory of the Companhia Nacional de Canto e Dança- [www.cncd.org.mz](http://www.cncd.org.mz)

There are similar song and dance groups all over the country. Each province has its own group based on its local identity, traditions and languages. There are also many choral groups.<sup>110</sup>

These types of performing groups are very active in Mozambique as they are called upon to perform at almost every public and social event. Within the internal market there is a clear demand for such performances. Traditional dance performances already have a comparatively high level of support within the country. Increasing the international visibility and performing at certain international fairs and events throughout the world could serve an ambassadorial role for Mozambique, adding a new dimension to the cultural image of the country and contributing to strengthening the creative economy in general.

However, while this type of performing arts is extremely valuable in terms of maintaining vibrant cultural traditions, it is less evident as a high potential growth sector for the development of international trade and exports of creative services.

**Action:** It is recommended to review and reinforce legislation on performers' rights to ensure that social security and pension systems are inclusive and applicable also to artists, performers and all different categories of creative workers.

<sup>110</sup> A famous festival of choral groups was broadcasted on television on 15 May 2009.

## 4.2 AUDIO-VISUALS AND NEW MEDIA

Creating the Instituto Nacional de Audiovisual e Cinema (INAC) was one of the government's first actions in 1975 when independence was achieved. Today the institute is in a seriously dilapidated state. The former cinema theatre has no roof and the walls are falling apart. The institute used to provide training but it no longer does so.

The Polytechnic University provides some film courses. There is no school of cinema, faculty of cinema or media studies at the university level, yet there is a serious need to train people to make films.

AMOCINE has a small fund of 90,000 euros for film and audio-visual production, which is financed through the French Embassy. This fund was established in 2004. They have had two editions and the fund has supported one fiction film and three documentaries.

There are currently no public financing structures in place, no incentives for film making and no tax exemptions of any sort.

The FUNDAC, which is part of the MEC, gives a prize once a year of \$4,000.

Film work is exclusively done on video. Films are made for the national market but there are hardly any possibilities for projecting these films. Many of the cinema theatres were sold and are now churches. In Maputo, films can be seen at the Cultural Centre of the University of Eduardo Mondlane. However, they do not have any projection equipment so screenings only happen when and if equipment is brought in. The Xenon and Gil Vicente cinema theatres have 35 mm projection possibilities. These theatres are owned by Lusomundo, a Portuguese distributor, and they show United States films. The Charlot cinema theatre shows Indian films. The Scala (Mozambique-owned) shows Indian and action films. The Avenida (Mozambique-owned) only has intermittent screenings. The Franco-Mozambican Cultural Centre (CCFM) also projects films.

Mozambique also has a considerable archive of historical films that are of significant value for the Southern African region. Films were produced in Mozambique that documented critical political events such as independence movements in e.g. Angola, Uganda, the United Republic of Tanzania, Zimbabwe and the Western Sahara. There are no reproduction possibilities in Mozambique and professionals usually go to South Africa to do the work.

There are no cooperative projects in the film and audio-visual realm at the regional level. It is primarily at the European level that any support and cooperation takes place. The Pan-African Association of Film-makers (FEPACI) is not particularly active at the moment.

An important initiative in this sector has been undertaken by Pedro Pimenta, a professional film producer and creative entrepreneur, to establish DOCKANEMA, a documentary film festival in Maputo. The festival continues in Nampula in partnership with Universidade Lurio. In addition, the festival does a travelling cinema programme with mobile film units on buses throughout the entire country. (The mobility programme has been linked to HIV/AIDS projects in the country.)

DOCKANEMA is a young festival developed through private initiative and has no government funding. In 2007 it had 14,000 spectators, including visitors from around the world.<sup>111</sup>

In June 2009, an important international event was the holding of the First Festival of Films and Audiovisuals from the CPL Countries. This event was a good occasion to promote lusophone films allowing for sharing of information and knowledge about the film industry. The event aimed at promoting further cooperation for co-productions among the eight Portuguese-speaking countries.

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<sup>111</sup> Director of the DOCKANEMA Festival, Maputo, 1 September 2008.

The linkages between cinema and the audio-visual sector in Mozambique are extremely limited. TV Mozambique, a public broadcaster that covers the entire country, recently started buying some productions. However, they do outright buys, or in some cases the directors simply give the film to the broadcaster in exchange for publicity.

**Action:** A priority need in this sector is the formulation of a cinema law and a broadcasting law.

**Action:** A funding mechanism for the film and audio-visual sector should be established. Such a fund could largely be supplied from industry transfers within the film, audio-visual and media sector itself. This could include contributions from broadcasters, i.e. a percentage of their overall advertising earnings could be destined to a fund; a tax on DVD sales; a tax on blank DVDs; or a contribution from Internet service providers or telephone companies who are or will soon be interested in providing creative content through their services.

**Action:** The FEPACI could eventually be considered as a vehicle through which to create regional structures and build cooperation within and across this sector.

The film, audio-visual and new media sector holds great potential within the creative economy in Mozambique. This sector can be considered as a medium- and long-term target. On the one hand, there are few training possibilities and facilities at the moment and it will take some time for things to move forward. On the other hand, long-term possibilities exist in terms of the growing need for creative content in all the media. There is potential for development in terms of both the national market and a targeted international market. One main obstacle to consider is the language barrier; however, this is not insurmountable given the rapid technological advances for translation. Given the outreach of the Brazilian soap opera (tele-novela) industry in the country, it might be more advantageous to focus on different aspects of creative content production. Attention should be paid to the documentary sector where the country has a comparative advantage.

**Action:** Assist feasibility studies with respect to the establishment of a film and video training institution, perhaps similar to the IMAGINE set-up in Burkina Faso by Gaston Kaboré.

**Action:** Assist in the identification of and contacts with international documentary distributors in the Portuguese-speaking countries, in particular Brazil and Portugal with the aim to facilitate joint collaborations.

Mozambique has attracted attention from international crews in search of the war-torn images offered by Maputo's battered, lush green streets. Hollywood productions such as *Blood Diamond*, *Ali* and *The Interpreter* (respectively starring Leonardo di Caprio, Will Smith and Nicole Kidman) were shot in Mozambique. "The problem is that in Mozambique, unfortunately, nobody is taking care of the film industry," said Joao Ribeiro, who is working on a new 1.3 million euro adaptation of a novel by local author Mia Couto, backed by Portuguese investors.<sup>112</sup>

**Action:** Assist government actions to streamline working permits for international film crews and reinforce contractual arrangements and the partnership position of Mozambique for co-productions and joint ventures.

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<sup>112</sup> AFP (2009). Mozambique film-makers turn opportunity into art. 19 March.

### Box 2. DOCKANEMA Festival

DOCKANEMA is a documentary film festival in Mozambique. Documentary film-making in Mozambique reached a very high level in the past and it is essential to keep it alive, in the name of collective memory and of individual cultural affirmation in the world at large. DOCKANEMA is intended to be an opportunity for meetings, discussions and contacts and a reflection on the present and the future. The festival shows dozens of films in various cinemas, and also takes them to other cities in the country. This sample includes films that have won international prizes, some very polemical, that have also been commercially successful. The documentaries come from every continent and from a great variety of countries, which normally do not reach interested audiences, most particularly film-makers in Mozambique. DOCKANEMA reaches a huge and growing audience, with its showings in the townships around the Mozambican capital and in other cities in the country. It wants to stir up a public that has become used to being passive when faced with the commonplace and cultural sameness of television, offering alternative views of the world. Parallel to the film shows, DOCKANEMA promotes formal and informal discussions around the situation of the documentary in Mozambique, the resources available to film-makers and the role of the various parties in this process (state television, backers and cooperation, writers, technicians, etc.). For this reason, DOCKANEMA invites directors and others involved in the films in the programme to interact with the Mozambican public.



**Pedro Pimenta, Director of the Dockanema festival, 5th Edition, 2010 Maputo, Mozambique,**  
<http://dockanema.wordpress.com>

### 4.3 PUBLISHING AND “BOOK CHAIN”

Mozambique has a strong literary tradition with a population that tends to read. The INLD within the MEC is actively working on implementing its national book policy.<sup>113</sup>

Approximately 180–200 titles are published each year in Mozambique, mostly for national consumption. According to some sources, up until 2000 there were about 70 publishers in the country and now there is a maximum of about 15 publishers. Other sources suggest that these figures are somewhat inflated.

The Ministry organizes book fairs in all the provinces, however many publishers do not have the funds to participate. The Ministry also promotes a publishers’ association to establish the ISDN system. They also have training programmes on desktop publishing. It is foreseen to start producing paper in the country in 2011. Educational books are subsidised by the government. The government has

<sup>113</sup> República de Moçambique. Ministério da Educação e Cultura (2008).

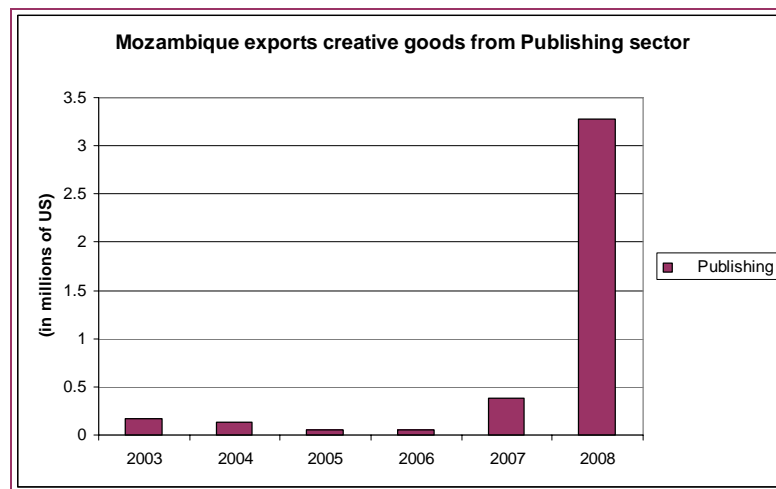
decided that a certain percentage of books should be published in Mozambique.<sup>114</sup> Books are exempt from taxes but all intermediary services to make books are taxed. Although sources diverge on this point, there are currently no taxes on educational books when they are imported. There is a plan for tax reductions on ink, paper and other materials necessary for publishing, but this fiscal policy has not yet been implemented by the government. The government has liberalized the publishing of school books.

One major obstacle for the development of the publishing sector is language and the limitation of Portuguese because there is no large market. Publishers indicated that they only go to fairs in Portugal and Brazil; otherwise they have problems with language. There is also a need to cultivate a book culture. It was also noted that local language publications are not exported to neighbouring countries, although in theory they could be. Mozambican books are often more expensive than imported Brazilian books. Finally, discussions with stakeholders also clearly indicated the need for capacity-building, in particular in the area of graphic design.<sup>115</sup>

Given the information gathered, it seems that the potential of the publishing and book sector lies primarily within the national markets. In this respect it can be considered for its contribution to national employment. In spite of the comparatively strong literary culture in Mozambique, the potential of this sector for export does not seem especially high. Even the possibility of electronic publishing seems to lie more in the long-term given the relatively low rate of accessibility to computer technology and Internet access.

Paradoxically, according to available trade data, the publishing sector leads the exports of creative goods from Mozambique, as shown in chart 7 below.

**Chart 7. Exports of creative goods from the publishing sector, 2003-2008**



Source: UNCTAD global database on the creative economy

#### 4.4 OTHER POTENTIAL SECTORS

In addition to the sectors noted above, there are other creative industries with economic potential that deserve attention. Noteworthy are visual arts, fashion and the music industry. It should be pointed out that music comes under the category of performing arts, which is one of the pre-designated project sectors. However, as noted in the introduction, it has been excluded as a primary target sector for this project because it is covered under the “One UN” MDG-F project, as is the crafts sector. Likewise, as you will see many of the predetermined sectors in the project are not position as priority sectors according to UNCTAD's trade data.

<sup>114</sup> Education Division, MEC. Maputo, 4 September 2008.

<sup>115</sup> Stakeholders' meeting, Maputo, 2 September 2008.

### 4.4.1 VISUAL ARTS

The visual arts sector in Mozambique appears to have enormous potential to be enhanced. In terms of painting and sculpture there are already internationally famous painters, sculptors and artists who circulate internationally in world art venues.

Mozambique has incredible wealth in terms of natural wood resources, with excellent quality and rare hard woods. As a consequence, the country has a very strong and vibrant wood sculpting and woodworking culture. Artistic talents and this exceptional resource have been nicely combined to create impressive creative works. This clearly can be pointed out as a sector that puts in evidence the cultural identity of the country and has great prospects for a further recognition in global markets. Mozambique has a comparative advantage in the area of original wood sculptures and the sector can greatly contribute to fostering inclusive development in Mozambique.

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 art crafts sector.

#### **Box 3. A tribute to Malangatana Valente Ngwenya**

The most remarkable story in the field of visual arts in Mozambique is the “discovery” of Malangatana Valente Ngwenya. He used to work as a servant in the colonial Lourenço Marques Club. The chairman of the club at that time, Augusto Cabral, encouraged the young Malangatana to resume his education and start his artistic works. A few years later, he became the spiritual father of Mozambican painters after his successful solo exhibition in 1961. His work was also an expression of emerging nationalism. When, in 1964, the Core Group of African Students (Núcleo dos Estudantes Africanos) staged an exhibition of exclusively Mozambican artists’ works, the secret police interfered. The successful exhibition displaying many of Malangatana’s works was closed because the works had too much nationalism. Repression increased and Malangatana disappeared in jail for a period of 18 months. In 1971 he studied engraving and ceramics. Since 1981, Malangatana has worked full-time as an artist. He has exhibited in Angola, Chile, India, Nigeria, Portugal and Zimbabwe, and his work is in collections in Angola, Bulgaria, Cape Verde, India, Mozambique, Pakistan, Portugal, Nigeria, Switzerland, the United States, Uruguay and Zimbabwe. He has been commissioned for several public art works, including murals for FRELIMO and UNESCO. Malangatana has also been active in establishing cultural institutions including the National Museum of Art, the Centre for Cultural Studies, the Centre for the Arts and a youth skills training centre in Maputo. He was also one of the founders of the Mozambican Peace Movement. After independence in 1975 the name was changed into Centro Organizativo dos Artistas Plásticos (COAP); eventually, the name Associação Núcleo de Arte was re-established. Source: African Contemporary <http://www.africancontemporary.com>.



Source: Photo from [soultraine.blogspot.com](http://soultraine.blogspot.com)



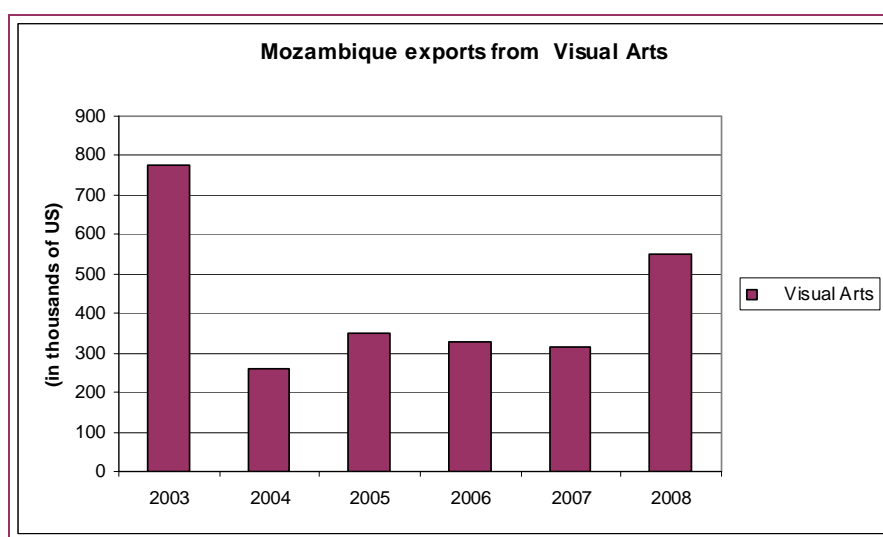
**Action:** A policy and implementation strategy could be developed in conjunction with the MIC industrial policy, with the MEC and the Ministry of the Environment, given the urgent necessity to protect and nurture the natural resource “wood”, which, although a renewable resource, should be preserved and properly regulated in order to not disappear. One can imagine that given these existing talents and traditions in terms of woodwork in the country, there is future in all creative work that links design and wood, including furniture.

**Action:** Local initiatives such as the Nucleo de Arte, a cooperative of local artists and the associative structuring of artists should be encouraged just as in the example of the musicians’ association. Specific funding opportunities should be developed in this realm, through residencies for example.

**Action:** The mobility and exposure of talented artists to global markets should be encouraged.

**Action:** A communication campaign through commercial embassies should be launched to promote and organize exhibitions of Makonde art, which is well known for the traditional sculpture and wood carving produced by the Makonde people in the north. Using hard woods (primarily mahogany, ebony, and ironwood), the Makonde create masks and sculptures known as “family trees”, which are large depictions of various figures that tell stories of generations. The government is encouraged to display on its official government websites illustrations of these quality creative products made in Mozambique.

**Chart 8. Mozambique’s exports of creative goods from the visual arts sector  
(in thousand of US\$)**



Source: UNCTAD global database on the creative economy

#### 4.4.2 DESIGN

In recent years, fashion has emerged as a promising creative sector in Mozambique. In 2005, a group of entrepreneurial cultural promoters and creative designers organized a Fashion Week in Mozambique. Since then it has become an annual event that is attracting growing interest not only on the part of Mozambicans and tourists, but also from those involved in the fashion sector in neighbouring countries. Every year the event is becoming more professionally prepared and is now a key event in the official cultural calendar of Mozambique. At the closing of the Second National Conference on Culture held in May 2009, a fashion show was among the cultural events promoted by the Ministry of Education and Culture. The event presented a retrospective of the highlights of previous shows and showcased the work of the fashion design winners since 2005.

Given the increasing focus at worldwide level for eco-ethnic fashion and given that Mozambique is an important textile producer, the creative fashion sector seems to have good potential for the national and international markets, and certainly deserves more strategic attention from the part of the government and creative business entrepreneurs.

**Action:** An effort should be made to put in place conducive conditions to allow the sector to flourish. Usually the fashion sector is very fragmented, composed of small and micro enterprises, therefore requiring appropriate financing mechanisms; vocational training and capacity-building to develop business skills; awareness of intellectual property issues like the creation of brands, labels and certificates of origin; a target export promotion strategy; possibilities to establish associations with other fashion designers for joint international campaigns; and participation in other international fashion shows in both northern and southern countries.

In this regard, UNCTAD invited a talented fashion designer from Mozambique, Sandra Cardoso Muendane, and an emerging creative artist specialized in fashion accessories made by natural fibres and organic materials, Henriette Njami, to take part on its Eco-Chic Fashion Initiative in January 2010 at the Palais des Nations, United Nations in Geneva. This event was jointly organized by the UNCTAD Creative Economy Programme and the UNCTAD Biotrade Initiative in partnership with the non-governmental organization GreentoGreener. The aim was to build upon the celebrations under the United Nations 2009 Year of National Fibres and the United Nations 2010 Year of Biodiversity, to engage the business community on the conservation of biodiversity and the development of creative industries. A seminar, a fashion show and a fashion exhibition spotlighted eco-ethnic fashion articles during a two-day event, with the objective of encouraging governments and creators involved in the fashion industry to promote the use of natural fibres and raise awareness to protect biodiversity.

**Action:** In terms of institutional mechanisms, an attempt should be made to set up an association of professionals from the fashion industry. This may facilitate at a later stage the formation of a creative cluster for fashion, allowing for cooperation, continuous learning, sharing costs for buying materials and equipments, a coordinated export promotion strategy, etc.

Interior design, including furniture, appears, as the fastest growing sector within the design component. See Chart 8. below.

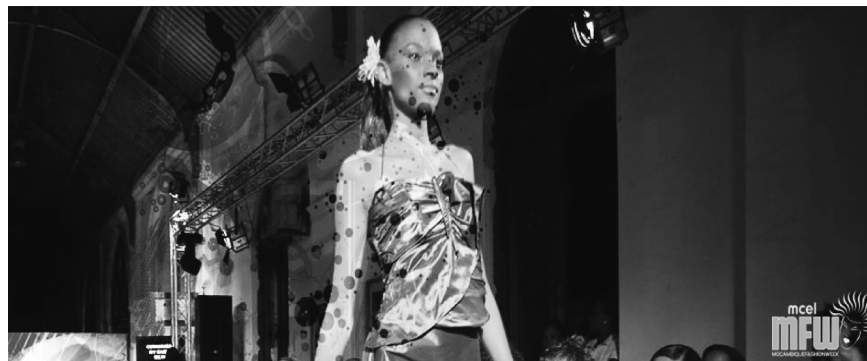
**Chart 9. Exports of creative goods from the design sector, by sub-categories, 2008**  
(in thousand of US\$)



Source: UNCTAD global database on the creative economy

#### Box 4. Mozambican Fashion Week 2009

The biggest winner of the Mozambique Fashion Week (MFW) 2008, fashion designer Taibo, was the great representative of Mozambique in the annual fashion event of South Africa, the Audi Joburg Fashion Week (AJFW) 2009, held from 21 to 24 January 2009 in the cosmopolitan city of Johannesburg. The AJFW 2009, with the participation of designers from different African countries including Egypt, Nigeria and Mozambique – represented by the MFW's winner of the category of Established Designer – has marked positively this event that has the participation of some of the most prestigious designers such as Thule Sindhi and Fabiani. Taibo showed his class in a parade marked by the glamour and innovation that is already registered as his trademark and style, through the eyes of an excited audience composed of respected African designers and critics uplifting the class and name of Mozambique.



Source: [www.mfw.co.mz](http://www.mfw.co.mz)

#### 4.4.3 ART CRAFTS

The art crafts sector in Mozambique is clearly flourishing and there seems to be good potential to be enhanced. There is already a significant amount of external and internal support for the crafts sector in the country. The local association CEDARTE is particularly present in this field. CEDARTE does not provide funding, although in their strategic plan they would like to develop the link between producers and microfinancing. The United States organization Aid to Artisans has been working for many years with local crafts organizations, in particular with CEDARTE. The organization is trying to encourage the sustainable management of resources, for example given the use of wood for many crafts and cultural objects they are concerned with sustainability of forests. Their priorities are marketing, access to markets, capacity-building on production and financing.

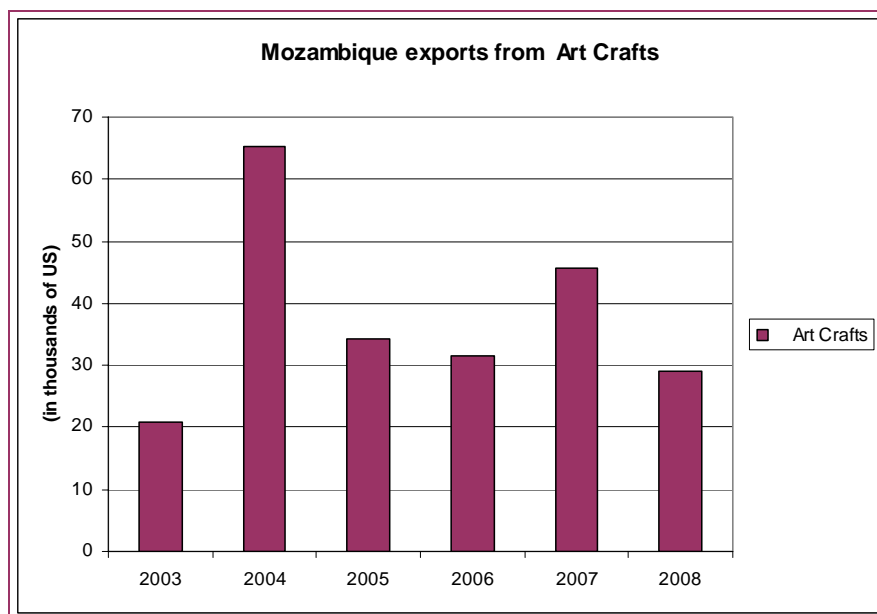
In the internal market, many tourists and upper income locals buy the crafts available locally. In terms of export markets there seems to be a great potential based on previous experience and success at fairs such as the New York Art Fair. According to stakeholders, there are about 50 associations in the sector, but the internal market is too small to support all the production and some craft producers do not deliver on time. Among the 50 associations there are only few exporters. Stakeholders noted the possibilities to expand the export of art crafts to global markets.<sup>116</sup>

It was noted that there are many sculptors that have had to start working as craftsmen because they were unable to make a living from their own sculptures. They started making copies for the market because of financial necessity. If an artist makes one object a month, the duplication work earns the

<sup>116</sup> Stakeholders' meeting, Maputo, 2 September 2008.

person significantly more money. However, they clearly pointed out that this duplication work should not be confused with creativity and that there was a serious need to support artists.<sup>117</sup>

**Chart 10: Mozambique: exports of Art Crafts**  
(in thousand of US\$)



Source: UNCTAD global database on the creative economy

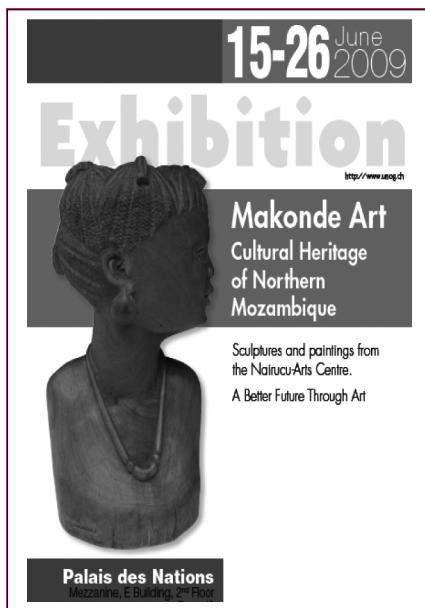
A positive initiative is the organization of the National Art Crafts Fair by CEDARTE. In 2009, the third edition of the fair took place from 3–8 September in Maputo, bringing together more than 30 exhibitors showcasing more than 300 product lines of 100 per cent handmade quality items. According to the organizers, the event was successful and recorded sales amounting to over 720,000 meticaís.

Mozambique has a vast range of natural resources suitable for the craft production of handcrafts, along with a large pool of talented artisans and strong cultural traditions throughout the country.<sup>118</sup>

Nairucu Arts is one active association established for the preservation and development of Makonde Art. The Makonde Art is typical of the North of Mozambique and it consists mainly of wood carvings made in ebony, sandal wood or light wood.

<sup>117</sup> Stakeholders' meeting, Maputo, 2 September 2008.

<sup>118</sup> For further information, please visit [www.cedarte.org.mz](http://www.cedarte.org.mz)



### Box 5: Nairucu Arts : promoting cooperation between Europe and Mozambique

The Nairucu-Arts Art Craft Centre is located in Rapale, Nampula and has been inaugurated by the Chief Administrator of Rapale in 2009. Art and Craft objects of high quality for national and international markets are produced and sold to sustain the long term development activities of the Centre. To optimize the work the persons selected to work and specialized there are provided with a meal and a modest fellowship for a period of 3 years, renewable for a maximum of another 2 years to allow them to exploit fully their creativity. The activities will be sustained for the Centre to become self-sufficient. The aim is to build cultural heritage, to bridge culture, creative economy and education and to invest in talent and innovation.

Sculptures and paintings from the Nairucu-Arts Centre - A Better Future Through Art - were exhibited to give a good overview of the current artistic production from the Centre, showing Makonde Art from Northern Mozambique. This event was opened by His Excellency Armando Emilio Guebuza, the President of the Republic of Mozambique. During a guided tour, representatives of Nairucu-Arts presented: Posters illustrating Mozambique history, geography and its natural attractions, the achievements realized by the country in the field of education and economic development, the Makonde art, the Nairucu-Arts Centre and its artists. The works included 22 Blackwood Sculptures, 2 Terracotta Sculptures and 7 Paintings.

The President of Cultural Activities Committee of the United Nation Office at Geneva introduced the speeches given by the Director-General of the United Nations Office at Geneva and the President of Mozambique. The exhibit was under the high patronage of Sergei Ordzhonikidze, Director-General of the United Nations Office at Geneva and Frances Rodrigues, Ambassador, Permanent Representative of the Republic of Mozambique to the United Nations Office and other International Organizations in Geneva and counted with the support of the Creative Economy Programme of UNCTAD.

Fonte: Associação Nairuco Arts, <http://www.nairuco-arts.org>

#### 4.4.4 MUSIC

The music scene in Mozambique is extremely vibrant and seems to have potential for market development. For the time being, the sector is largely centred on live performances by the musicians as opposed to recorded sales. The complications in terms of rights and benefits for the creators in this sector are crucial to address issues related to the current situation.

There are a few local clubs in Maputo where local bands play live on a regular basis. There are also a number of studios in Maputo. An example is Ekaya, a young dynamic company headed by Joao Schwalbach,<sup>119</sup> that employs five people. The company's reputation for quality work is growing. Their primary source of income is from television work and the company's connections to the South African industry seem fundamental to the enterprise.

Ekaya has two activities that could be of particular interest for this project. First, the company is planning on doing a Mozambican version of the Cuban Buena Vista Social Club project with Marrabenta, with a recording. Just as the Buena Vista project had an impact on Cuban music exports in international markets, the Marrabenta project could work in the same direction for Mozambique.

Second, Ekaya is interested in starting an international music festival in Maputo. The intention is to create a festival with roots music from Mozambique, bringing together musicians from the different regions of the country, but also to programme international musicians in that genre, which could increase the visibility of such an event. This is precisely the type of event that can create a powerful stimulation for the growth of the sector in terms of artistic exchange, development and visibility.

**Action:** Local professionals such as this creative entrepreneur should be identified and invited for capacity training in terms of business skills.

Possibilities to facilitate networking and partnerships with local and international companies could help to materialize initiatives. In this context, UNCTAD invited the President of WOMEX (World Music Expo) to address a workshop in Maputo on June 2009<sup>120</sup> with the aim to facilitate a strategic alliance for shaping the future international music festival of Maputo.

The local music industry is confronted by a number of obstacles. In terms of markets, it has to compete with its overwhelming neighbour, South Africa and with other African countries such as the Congo and Senegal, which are already established in both African and international markets. In addition, the local industry also faces obstacles related to rights issues and piracy.

**Action:** As mentioned above, the music sector is covered in the "One UN" MDG-F project. The Danish Government is also active in supporting the music sector. Nonetheless, this project could provide some input in the sector in a targeted manner. This could entail providing some institution-building support and focused capacity-building. In particular, AMMO could benefit from training in two areas. First, strengthening the organization so that it can improve its ability to help musicians protect and promote their own interests. For example, a website for the association could help disseminate information about the musicians and their music. Second, the musicians themselves could benefit from capacity-building. For example, since the musicians are often constrained to producing themselves and to being their own agents, training linked to entrepreneurial skills for artists and on rights issues seems rather crucial in this sector.<sup>121</sup>

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<sup>119</sup> Meeting with João Carlos Schwalbach, Ekaya Produções Maputo, 3 September 2008.

<sup>120</sup> The workshop was an event in the context of the Euro-African Campus for Cultural Cooperation, organized by the Observatory of Cultural Policies for Africa based in Maputo and the InterArts Foundation from Spain.

<sup>121</sup> Meeting with members of the Association of Musicians, Maputo, 3 September 2008.



## PART 5. CONCLUSIONS

Recommendations for actions to be taken are indicated throughout the entire document and thus integrated into the analysis. Instead of reiterating all these points, the conclusions are more general. The first part of this section summarizes the results of the meetings with stakeholders and with relevant government ministries. The second part emphasizes the sectors with high potential for growth among the creative industries and finally some concluding remarks are made and a Plan of Action proposed as a tool for the formulation of a comprehensive policy towards the enhancement of the creative economy in a long-term perspective.

### 5.1 RESULTS OF MEETINGS WITH 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 to be addressed.

The main results from stakeholder meetings were:

- (a) The need for institution-building;
- (b) The need for capacity-building;
- (c) The need for financing mechanisms and legislation;
- (d) A framework to support creative SMEs and to attract investors.

The main results of the government level meetings were:

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

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

- (a) Reinforcing institutions and regulatory framework;
- (b) Capacity-building in general.

### 5.2 SECTOR EVALUATION

A differentiation can be made among sectors that have a high development potential nationally or in terms of exports. Furthermore, a distinction can be made in terms of the targeted markets, for example, mass/popular markets or different categories of tourist markets, such as international mass or international upper income markets. An additional differentiation can be made in terms of short-, medium- and long-term goals.

A number of sectors stand out as having high potential for development in the short term because they are already in a comparatively strong position in Mozambique.

#### 5.2.1 VISUAL ARTS

In the visual arts sector, reference has been made to the possibilities for strengthening the area of sculpture, in particular woodworking, and the area of painting.



In terms of sculpture and woodworking two levels can be distinguished: (a) art crafts and home decor (directed at a larger mass-oriented export market and a tourist market) and (b) sculpture (which is sold largely to an elite clientele, tends to circulate abroad in international art circuits and also addresses part of the tourist market).

This project should target enhancing upscale production linked to sculpture in general and in particular woodworking, and in a long-term perspective, work toward bringing it closer together to design-related wood production, as for example in wood furniture.

### 5.2.2 DESIGN

The design sector in Mozambique can take advantage of the skilful imagination of its people and the richness of its natural resources, and take a stake in an ever increasing eco-friendly global market. Thanks to the power of the media, consumers are becoming more conscious of the environmental and social impact of their purchase. Eco-fashion, including jewellery and accessories, handicrafts and interior design products can work in harmony with nature, and are feasible options for the country.

It is worth noting that the MIC has wood as one of its priority sectors, as well as textiles and garments.<sup>122</sup> This area could also be targeted for further development in the direction of creative eco-ethical textiles and fashion. In a longer-term perspective the importance of the design sector should be considered.

### 5.2.3 FILM, AUDIO-VISUAL AND NEW MEDIA

The film, audio-visual and new media sectors seem to have potential for development above all, in the medium term. Taking into account the historic culture of cinema in the country, and in particular the growing role of documentary work in Mozambique, there is a strong foundation to build upon.<sup>123</sup> The potential for audio-visual products, in both national and international markets, should be given attention. Strengthening this domain can go hand in hand with nurturing new media and graphic design. Placing emphasis on graphic design can have a double function for its utility in both the electronic visual domain and the publishing area.

### 5.2.4 PERFORMING ARTS

The performing arts sector seems to have the most potential in terms of the national market and as such it should be considered for its contribution to employment creation and to keep alive the local culture. This sector seems not very attractive to international markets. However, their participation in Festivals should be encouraged.

### 5.2.5 MUSIC

In terms of the music sector, this project could intervene in a specific manner by contributing to the reinforcement of the associative structure of the industry, notably AMMO, although attention must be given to avoid duplicating other donor projects and to focus on the points mentioned earlier. A second targeted intervention in this sector could be to support the development of an international Mozambican roots music festival. Festivals can be crucial instruments to create awareness, interest, supply and demand to creative goods and services around the music industry.

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<sup>122</sup> See, Industrial Policy and Strategy, Ministry of Industry and Trade, July 2007.

<sup>123</sup> DOCKANEMA is currently setting up a networking/professionalization/marketing scheme for the documentary sector, together with two partner countries. This could be a specified target project to provide training and professional capacity-building.

### 5.2.6 BOOK SECTOR

The book publishing sector just as the performing arts sector may have not a high potential target for increased exports. It seems to have most potential for responding to the growth of demand at the national level and in other lusophone countries. A distinction should also be made between policies oriented towards educational books and printed material, and those relating to literary production.

### 5.3 COMMUNICATION, NETWORKING AND STRATEGIC ALLIANCES

Three different aspects should be considered in this area.

First, a communication strategy to create and improve awareness of the creative industries within Mozambique seems essential. A first step could be to present and discuss the findings and proposals put forward in this project document with high-level government officials, to allow for a policy dialogue that could take the form of a workshop. The event could be participatory and also involve the representatives of all creative sectors and relevant institutions, including the media.

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

Third, the creation of festivals and large events can be extremely beneficial to the development of the creative sectors. Creating an area of specialization in a particular sector attracts people and expertise, and it fosters exchange and learning within that sector. Thus, projects like the documentary film festival should be encouraged, as well as the planned roots music festival. Such initiatives are part of a long-term strategy given that the benefits are often not immediately visible. Finally, events such as the EU-ACP festival, the EU-ACP Cultural Colloquium held in Brussels in April 2009 and other similar events not only in Europe but also in other developing countries could be used as an international platform to increase visibility, interest and business opportunities for the creative industries, while contributing to enhance North–South and South–South cooperation in the area of the creative sectors.

### 5.4 TOWARD A COMPREHENSIVE CREATIVE INDUSTRIES POLICY

With the objective of working toward a comprehensive policy not only to strengthen the creative industries, but also to put in place the basis for a solid and sustainable strategy for the creative economy, the ACP/EC/ILO/UNCTAD/UNESCO project recommendations have been structured around three components that span the two phases of the project:

- (a) Reinforcing the institutional structures and policy framework;
- (b) Capacity-building activities and technical assistance;
- (c) A communications strategy and awareness building on the creative industries

In phase one of the project, UNCTAD activities were centred on research analysis and policy advice. In phase two, UNCTAD plans to focus on institution-building and capacity-building for government officials, including the skills to articulate cross-cutting actions that are crucial to putting in place concerted multi-disciplinary policies to enhance the development dimensions of the creative economy. This activity would include the areas covered under section 3 in this report, in particular the interface between investments, digital technologies, enterprise and trade. ILO will focus on labour issues and training activities on creative entrepreneurship and managerial business skill, while UNESCO will provide technical assistance to targeted institutions to reinforce cultural associations and the regulatory framework around the creative sector.

A priority action must be seen in the mobilization of the pertinent government ministries to agree and implement a policy in favour of a long-term strategy for the creative economy as a whole. It is important to optimize existing mechanisms to facilitate inter-ministerial regular consultations to ensure that the different ministries are aware of policies and projects pertaining to the creative sectors within

their respective spheres and with the ability to propose and implement the necessary actions on their respective domains.

There are already two inter-ministerial task forces in place: one on IPR strategies as noted by the Ministry of Science and Technology, and another was set up in the context of the MDG-F project to facilitate its implementation. The MDG-F task force includes a representative from the Ministry of Agriculture, the Ministry of Industry and Commerce, the Ministry of Tourism, the Ministry of Labour, the Ministry of Youth and Sport, the Ministry of Education and Culture, the Ministry of International Trade and Cooperation and the Ministry of Health.

The establishment of an Inter-Ministerial Committee for the Creative Economy could be an extension of the already in place IPR inter-ministerial task force with a broader scope and carefully determined and above all maintaining a multi-sectoral cross-cutting agenda, involving all the ministries concerned. This standing mechanism should remain in place after the implementation of the ongoing projects, and should meet on a regular basis at least every three months to ensure implementation and monitoring of the policy actions. Moreover, in its strategic plan the MEC has already laid the foundations for addressing the creative industries. This rationale could be enlarged to create a common policy which spans across the ministries.

The analysis and policy framework proposed by UNCTAD in this study and the process of its validation, including the proposed plan of action for the joint implementation by ILO, UNCTAD and UNESCO, by all relevant ministries has already paved the way for the setting-up of this institutional inter-ministerial mechanism. This is a prerequisite and a key starting point for the long-term strategy on the creative economy and the successful execution of this pilot project.

In a complementary manner, this report has pointed out various macro- and micro-level issues proposing a series of possible policy interventions. Our intention was to propose feasible options to assist the government to put in place appropriate public policies and concrete measures to reinforce the creative sectors with greater competitive advantage in local and world markets. It is expected that this combined approach will form the basis of a comprehensive policy to enhance the creative economy in Mozambique on a sustainable and long-term basis.

## PART 6. PLAN OF ACTION

In order to support the government to execute the required policies and to take the necessary steps to strengthen its creative industries, the implementing agencies have jointly prepared a Plan of Action, as presented in the table below. It lists a series of activities expected to be undertaken during the second phase of implementation of this multi-agency project foreseen for the period 2010–2011.

Due to budgetary constraints, the number of planned activities is relatively limited but they are targeted and expected to have a far-reaching positive impact for harnessing the creative economy in Mozambique, particularly because other complementary measures are gradually being taken by other ongoing international cooperation projects.

In phase I of the project, UNCTAD activities are centred on policy advice to the Government through the elaboration of this country study and the elaboration of a plan of action. In phase II of the project, UNCTAD activities will be 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 for strengthening the creative industries in the country. 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 better use of ICT tools.

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

In this context, upon the request of UNCTAD, the United Nations Resident Coordinator in Mozambique convened a High-level Policy Dialogue held on 29 June 2009, in Maputo, on behalf of ACP/EU/UNCTAD/ILO/UNESCO. The meeting gathered government authorities, associations and stakeholders from the creative sectors with the aim to present, discuss and validate this UNCTAD study, *Strengthening the Creative Industries in Mozambique*, and the proposed Plan of Action. Participants recognized that the study was in line with government priorities and therefore received full support from the United Nations Coordination Office in Mozambique. The validation process of the Plan of Action was under the responsibility of the UNESCO office in Maputo.

This report provides the analysis and the arguments in support of the proposed activities as presented in the Plan of Action, which has 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 from Mozambique's artistic and creative communities in October 2009. The validated Plan of Action is presented below.

Joint Programme for Strengthening the Creative Industries in Five ACP Countries through Employment and Trade Expansion, financed by the European Union

**Mozambique Action Plan – October 2009**

ACTIVITY	2008	2009	2010	2011	(UNCTAD, UNESCO, ILO)	PARTNERS
<b>Output 1: Reinforced institutional mechanisms and policy formulation for an enabling environment for creative industries</b>						
1.1 Coordination meeting in Brussels	x	x			All	EU, ACP
1.2 Preparation for launching of the project in Mozambique	x				All	All relevant ministries and institutions
1.3 Fact-finding mission/stakeholder consultations in Maputo	x				All	All relevant ministries and institutions and key stakeholders
1.4 Preparation of plan of action	x	x			All	
1.5 Policy framework and institutional mechanism for creative policies		x	x		UNCTAD, UNESCO	All relevant ministries and institutions
1.6 Set up coordination mechanism for inter-ministerial action. Set up advisory group on creative industries with public/private stakeholders		x			All	EU; Observatory of Cultural Policies in Africa; Ministries of Education and Culture, Industry and Trade, Youth and Sport, Tourism, Science and Technology
1.7 Regular meetings of advisory group and coordination facility (videoconference)		x	x	x	All	Private and public stakeholders
1.8 Facilitate the adoption of a Cinema Law: establishing a negotiating platform		x		x	UNESCO	INAC, AMOCINE, Ministry of Education and Culture
1.9 Facilitate the adaptation of this Cinema Law: sharing international experience, technical assistance and elaboration of new a draft			x	x	UNESCO	INAC, AMOCINE, Ministry of Education and Culture
1.10 Facilitate the adaptation of this Cinema Law: raising awareness and gaining parliamentarian support				x	UNESCO	INAC, AMOCINE, Ministry of Education and Culture
1.11 Support the development of the copyright regulatory framework: provide technical assistance and knowledge transfer		x	x		UNESCO	CISAC, SOMAS, WIPO
1.12 Support the development of the copyright regulatory framework: negotiate with stakeholders the decrees			x		UNESCO	Ministries of Education and Culture, Science and Technology, CISAC, SOMAS, WIPO
1.13 Support the development of the copyright regulatory framework: strategy of influence and advocacy, secure political backing			x	x	UNESCO	Ministries of Education and Culture, Science and Technology, CISAC, SOMAS, WIPO
<b>Output 2: Developed publicity and visibility for programme in the country</b>						
2.1. Hire a web designer		x			UNESCO	Project Steering Committee
2.2. Design web page		x			UNESCO	Project Steering Committee
2.3. Develop web content		x	x	x	All	Steering Committee
2.4. Update and maintain website			x	x	All	

ACTIVITY	2008	2009	2010	2011	(UNCTAD, UNESCO, ILO)	PARTNERS
<b>Output 3: Policy review on creative industries: identified key issues and policy recommendations</b>						
3.1 Preparation of Mozambique Creative Industries Policy Review study	x	x			UNCTAD	All relevant ministries and institutions
3.2 Convening of High-level Policy Dialogue to present the study to authorities and key stakeholders		x			UNCTAD	All relevant ministries and institutions
3.3 Consultation/validation plan of action		x			All	All relevant ministries and institutions
3.4 Printing, translation and distribution of the study		x			UNCTAD	All relevant ministries and institutions
3.5. Follow-up of policy recommendation		x	x	x	All	All relevant ministries and institutions
<b>Output 4: Strengthened capacities on trade- and investment-related issues for policymakers and institutional stakeholders</b>						
4.1 Preparation of capacity-building model on trade and investment covering: -Trade negotiations: market access; EU /ACP cooperation agreement; WTO negotiations -Export promotion strategies; investment agreements, incentives, etc.; ICT tools		x			UNCTAD	Ministries of Trade, Technology, Foreign Affairs, Finance, Culture; and other relevant institutions
4.2 Testing, translation and publishing training materials and handbook		x	x		UNCTAD	
4.3 Capacity-building workshop on trade and investment issues, an policy formulation for the creative economy			x		UNCTAD	Ministries of Education and Culture, Industry and Trade, Youth and Sport, Tourism, Science and Technology; EU; OCPA; and other relevant institutions
4.4. Follow-up and evaluation of capacity-building session			x	x	UNCTAD	
4.5. Strengthen AMMO through the development and implementation of an operational plan			x	x	UNESCO, ILO	AMMO; International Federation of Musicians
4.6 Support the INAC through mentoring relationships with relevant partners			x	x	UNESCO	Audio-visual Institute of Colombia (ICAIC)
<b>Output 5: Developed capacity of institutions and skilled artists in business management</b>						
5.1 Preparation of publications, workshops, training activities		x	x		ILO	Ministry of Labour
5.2. Training materials adaptation/translation		x			ILO	GAPI; Ministry of Labour
5.3 TOT workshops		x	x	x	ILO	GAPI; Ministry of Labour; and other relevant bodies
5.4. Follow up trainers support		x	x	x	ILO	GAPI; Ministry of Labour
5.5. Training of artists		x	x	x	ILO	GAPI; Ministry of Labour
5.6. Monitoring and evaluation		x	x		ILO	GAPI



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## PART 7 -COUNTRY PROFILE AND STATISTICS

# COUNTRY PROFILE AND STATISTICS

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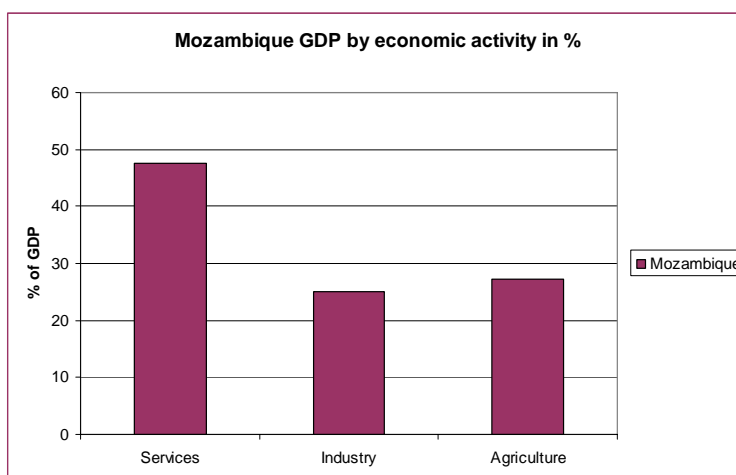
Note: All charts and statistical data in this report are generated from the UNCTAD Global databank on Creative Economy

## 7.1 COUNTRY PROFILE AND STATISTICS

## Part I. Mozambique Country Profile: economic indicators and statistics

	2000	2005	2008
Population in thousands	18,249	20,834	22,383
GDP in millions US\$	4,310	6,579	9,840
GDP per capita in US\$	236	316	440

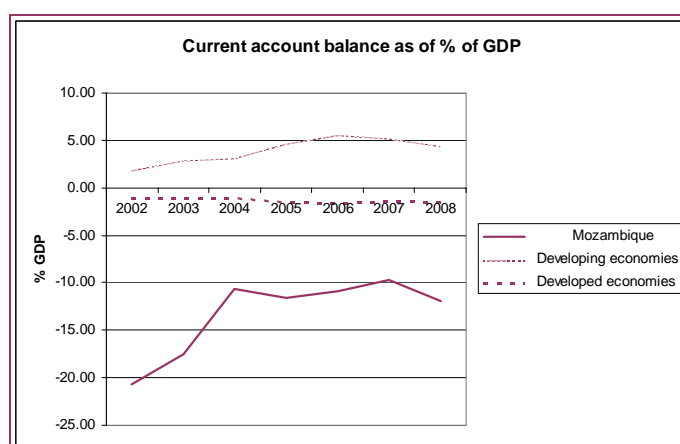
## Gross domestic product by economic activity in 2008- Mozambique



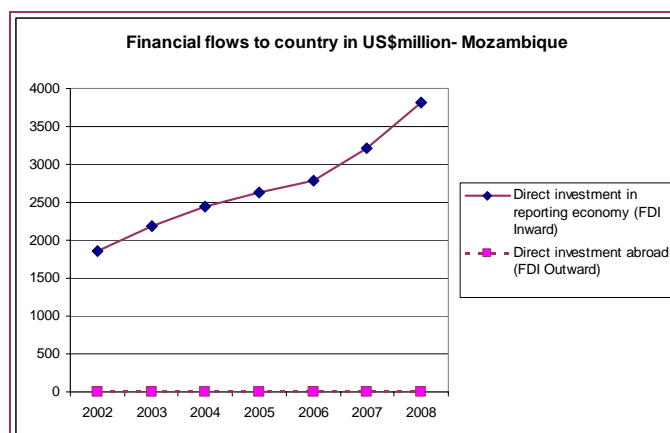
## Annual average gross domestic product growth rate in %

	2000 - 2005	2005	2008
<b>Mozambique</b>	8.51	8.39	7.00
Developing economies	5.47	6.77	5.47
Transition economies	6.15	6.41	5.40
Developed economies	1.95	2.37	0.86

## Current account balance as % of GDP



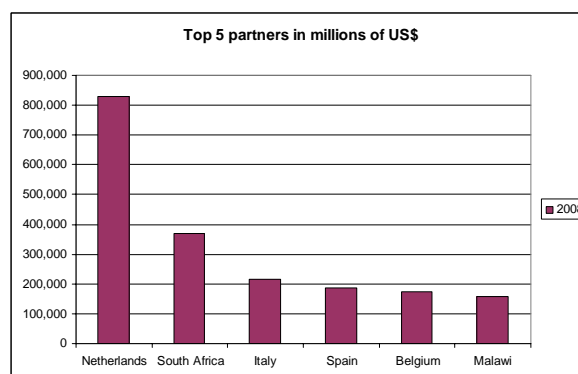
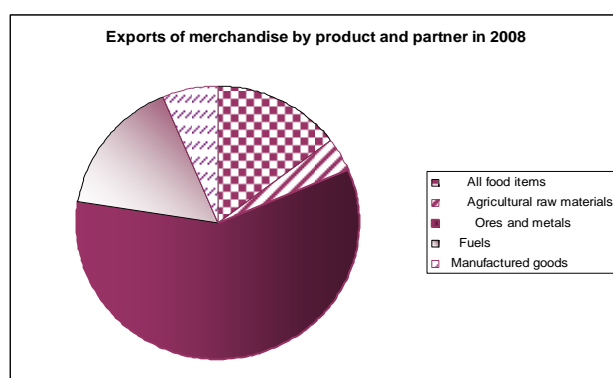
### Financial flows to country in US\$ million - Mozambique



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

	2000	2005	2008
Exports of merchandise	364	1745	2653
Exports of services	325	342	555
Imports of merchandise	1,162	2,408	4,008
Imports of services	446	649	965

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

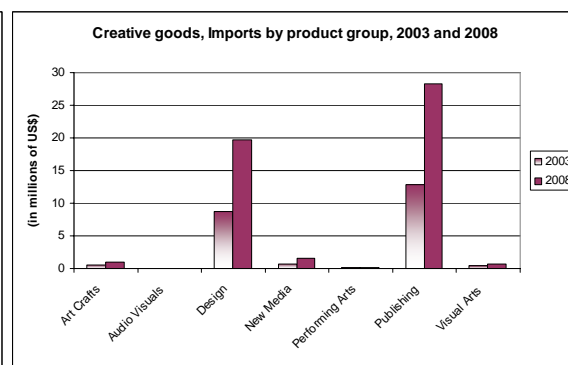
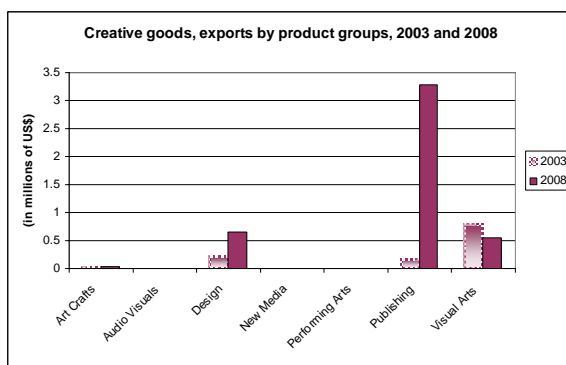
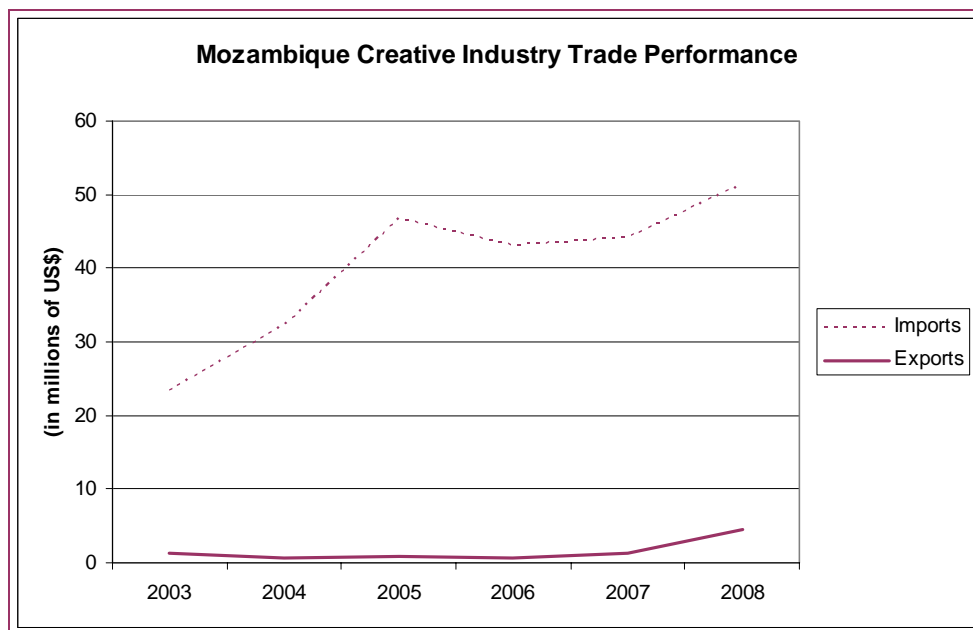


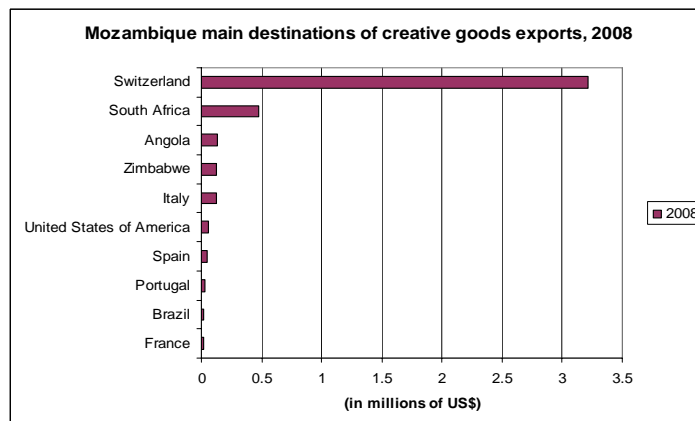
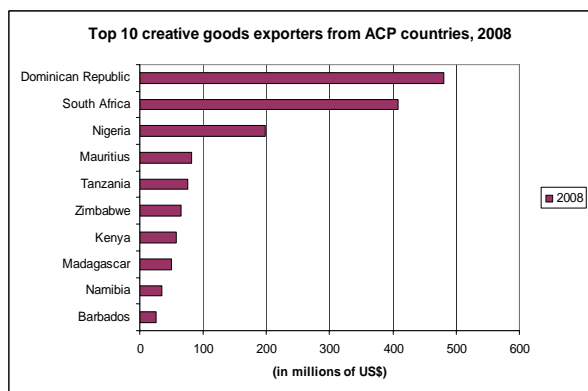
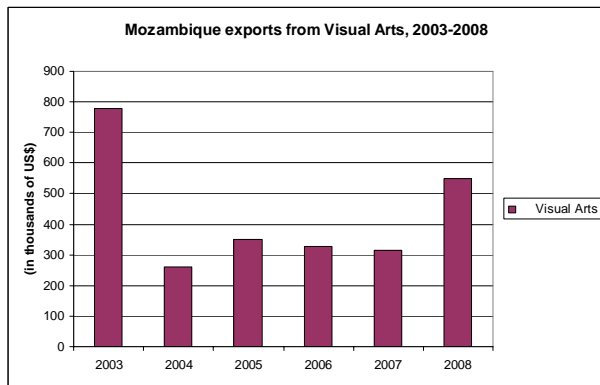
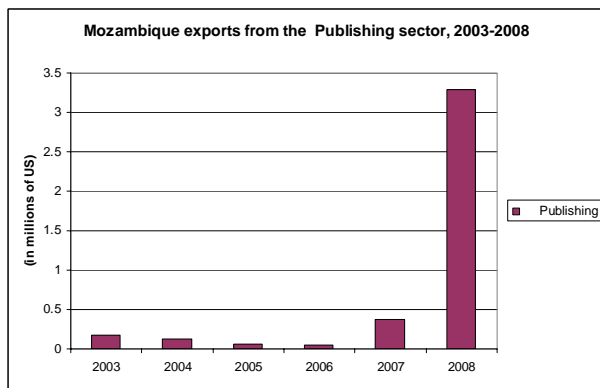
## 7. 2. MOZAMBIQUE CREATIVE INDUSTRIES TRADE PERFORMANCE

## Part 1. Creative industries trade performance, 2003 and 2008

Mozambique	Value (in thousands)					
	2003			2008		
	Exports	Imports	Balance	Exports	Imports	Balance
All Creative Industries	9,744	69,689	-59,945	53,632	99,122	-45,490
Creative Goods	1,198	23,285	-22,087	4,513	51,378	-46,865
Creative Services	8,546	46,404	-37,858	49,119	47,744	1,375

Source: UNCTAD Global database on Creative Economy







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

2003							
PRODUCT	Value (in millions of US\$)			Share (%)			
	Exports	Imports	Balance	(% of total products)		(% of world)	
	Exports	Imports	Balance	Exports	Imports	Exports	Imports
<b>All Creative Industries</b>	1.2	23.3	-22.1	100.0	100.0		
<b>Art Crafts</b>	0.0	0.5	-0.5	0.0	0.0	0.0	0.0
Carpets	0.0	0.2	-0.2	0.0	0.0	0.0	0.0
Celebration	0.0	0.1	-0.1	0.0	0.0	0.0	0.0
Other	0.0	0.0	0.0	0.0	0.0	0.9	0.0
Paperware	..	0.0				0.0	0.0
Wickerware	..	0.0				0.0	0.0
Yarn	0.0	0.2	-0.2	0.0	0.0	0.1	0.0
<b>Audio Visuals</b>	..	0.0					
Film	..	0.0					
<b>Design</b>	0.2	8.7	-8.4	0.2	0.4	0.0	0.0
Architecture	..	0.0					0.0
Fashion	0.0	1.2	-1.2	0.0	0.1	0.0	0.0
Glassware	0.0	0.1	-0.1	0.0	0.0	0.0	0.0
Interior	0.2	6.8	-6.6	0.2	0.3	0.0	0.0
Jewellery	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Toys	0.0	0.5	-0.5	0.0	0.0	0.0	0.0
<b>New Media</b>	0.0	0.7	-0.7	0.0	0.0	0.0	0.0
Recorded Media	0.0	0.6	-0.6	0.0	0.0	0.0	0.0
Video Games	0.0	0.1	-0.1	0.0	0.0	0.0	0.0
<b>Performing Arts</b>	0.0	0.1	-0.1	0.0	0.0	0.0	0.0
Music (CD, Tapes)	0.0	0.1	-0.1	0.0	0.0	0.0	0.0
Printed Music	..	..					
<b>Publishing</b>	0.2	12.9	-12.7	0.1	0.6	0.0	0.0
Books	0.0	10.7	-10.6	0.0	0.5	0.0	0.0
Newspaper	0.1	1.3	-1.1	0.1	0.1	0.0	0.0
Other Printed Matter	0.0	0.9	-0.9	0.0	0.0	0.0	0.0
<b>Visual Arts</b>	0.8	0.4	0.3	0.6	0.0	0.0	0.0
Antiques	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Paintings	0.1	0.1	0.0	0.0	0.0	0.0	0.0
Photography	0.1	0.2	-0.1	0.1	0.0	0.0	0.0
Sculpture	0.6	0.1	0.5	0.5	0.0	0.0	0.0

## Mozambique Creative Industries Trade Performance by sectors, 2008

PRODUCT	2008							Growth rate 2003-2008 (%)
	Value			Share				
	(in millions of US\$)			(% of total products)		(% of world)		
	Exports	Imports	Balance	Exports	Imports	Exports	Imports	
<b>All Creative Industries</b>	4.5	51.4	-46.9	100.0	100.0			27.3
<b>Art Crafts</b>	0.0	1.0	-1.0	0.0	0.0	0.0	0.0	1.5
Carpets	0.0	0.2	-0.2	0.0	0.0	0.0	0.0	-2.3
Celebration	0.0	0.3	-0.3	0.0	0.0	0.0	0.0	109.5
Other	0.0	0.1	-0.1	0.0	0.0	0.0	0.0	3.2
Paperware	..	0.0						..
Wickerware	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-47.0
Yarn	0.0	0.3	-0.3	0.0	0.0	0.0	0.0	13.1
<b>Audio Visuals</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.6
Film	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.6
<b>Design</b>	0.6	19.7	-19.0	0.1	0.4	0.0	0.0	21.2
Architecture	0.0	0.0	0.0	0.0	0.0	0.0	0.0	..
Fashion	0.2	2.7	-2.6	0.0	0.1	0.0	0.0	49.2
Glassware	..	0.3						137.0
Interior	0.4	15.0	-14.6	0.1	0.3	0.0	0.0	15.4
Jewellery	0.0	0.1	-0.1	0.0	0.0	0.0	0.0	106.3
Toys	0.0	1.6	-1.5	0.0	0.0	0.0	0.0	-11.7
<b>New Media</b>	0.0	1.6	-1.6	0.0	0.0	0.0	0.0	174.5
Recorded Media	0.0	1.5	-1.5	0.0	0.0	0.0	0.0	156.0
Video Games	0.0	0.1	-0.1	0.0	0.0	0.0	0.0	81.7
<b>Performing Arts</b>	0.0	0.1	-0.1	0.0	0.0	0.0	0.0	-20.3
Music (CD, Tapes)	0.0	0.1	-0.1	0.0	0.0	0.0	0.0	-20.3
Printed Music	..	0.0						..
<b>Publishing</b>	3.3	28.3	-25.0	0.7	0.5	0.0	0.0	67.1
Books	0.0	25.1	-25.0	0.0	0.5	0.0	0.0	-9.0
Newspaper	0.0	2.1	-2.0	0.0	0.0	0.0	0.0	-12.4
Other Printed Matter	3.2	1.1	2.1	0.7	0.0	0.0	0.0	230.2
<b>Visual Arts</b>	0.6	0.8	-0.2	0.1	0.0	0.0	0.0	-3.5
Antiques	0.1	0.0	0.1	0.0	0.0	0.0	0.0	14.9
Paintings	0.1	0.0	0.0	0.0	0.0	0.0	0.0	3.6
Photography	0.0	0.4	-0.3	0.0	0.0	0.0	0.0	-25.0
Sculpture	0.3	0.3	0.0	0.1	0.0	0.0	0.0	-7.2

## 7.3 MOZAMBIQUE TRADE OF CREATIVE GOODS

## 7.3.1 MOZAMBIQUE TRADE OF CREATIVE GOODS, BY PRODUCT GROUPS, 2003-2008

		Value (in thousand US\$)					
		2003	2004	2005	2006	2007	2008
<b>All Creative Goods</b>	Imports	23,285	32,179	46,637	42,971	44,069	51,378
	Exports	1,198	586	927	625	1,221	4,513
<b>Art Crafts</b>	Imports	541	658	2,614	1,839	1,496	995
	Exports	21	65	34	32	46	29
<b>Audio Visuals</b>	Imports	10	25	29	27	12	14
	Exports	..	0	1	3	0	0
<b>Design</b>	Imports	8,668	9,947	12,651	14,167	15,016	19,671
	Exports	221	130	203	157	225	644
<b>New Media</b>	Imports	653	1,191	839	3,073	2,123	1,566
	Exports	1	0	279	37	254	7
<b>Performing Arts</b>	Imports	125	210	226	245	177	122
	Exports	6	4	0	16	2	1
<b>Publishing</b>	Imports	12,857	19,630	29,165	21,856	24,399	28,254
	Exports	173	125	59	54	378	3,282
<b>Visual Arts</b>	Imports	431	518	1,114	1,765	846	757
	Exports	777	262	351	327	316	551

Note: .. Data not available or not separately reported

## 7.3.2 MOZAMBIQUE TRADE OF CREATIVE GOODS WITH SADC COUNTRIES

## BY PRODUCT GROUPS, 2003-2008

		Value (in thousand US\$)					
		2003	2004	2005	2006	2007	2008
<b>All Creative Goods</b>	Imports	8,678	11,766	14,434	18,171	16,260	15,258
	Exports	233	233	125	246	1,067	745
<b>Art Crafts</b>	Imports	283	361	326	427	586	475
	Exports	19	2	2	14	39	16
<b>Audio Visuals</b>	Imports	0	1	5	5	1	1
	Exports	..	..	0	0	..	..
<b>Design</b>	Imports	4,609	5,018	5,816	7,207	7,096	8,263
	Exports	117	90	44	79	176	530
<b>New Media</b>	Imports	244	956	566	2,107	1,495	848
	Exports	0	0	4	35	212	3
<b>Performing Arts</b>	Imports	60	95	99	116	69	54
	Exports	3	3	..	12	2	..
<b>Publishing</b>	Imports	3,181	4,947	6,831	7,573	6,603	5,194
	Exports	40	110	24	27	350	44
<b>Visual Arts</b>	Imports	301	388	790	736	409	423
	Exports	53	28	51	77	288	151

Note: .. Data not available or not separately reported

### 7.3.3 MOZAMBIQUE TRADE OF CREATIVE GOODS WITH SOUTH AFRICA

#### BY PRODUCT GROUPS, 2003-2008

		(in thousand US\$)					
		2003	2004	2005	2006	2007	2008
<b>All Creative Goods</b>	Imports	8,637	11,436	13,641	15,269	15,988	14,649
	Exports	225	101	77	175	727	480
<b>Art Crafts</b>	Imports	281	273	321	407	586	470
	Exports	19	2	2	14	27	15
<b>Audio Visuals</b>	Imports	0	1	4	4	..	0
	Exports	..	..	..	..	..	..
<b>Design</b>	Imports	4,584	4,931	5,748	7,159	7,051	8,126
	Exports	116	85	21	76	165	396
<b>New Media</b>	Imports	244	943	448	2,062	1,476	639
	Exports	0	0	..	4	212	3
<b>Performing Arts</b>	Imports	57	95	99	116	69	53
	Exports	1	1	..	12	1	..
<b>Publishing</b>	Imports	3,170	4,807	6,231	4,786	6,402	4,938
	Exports	40	3	22	19	41	11
<b>Visual Arts</b>	Imports	300	385	790	736	404	422
	Exports	49	11	32	49	281	55

Note: .. Data not available or not separately reported

### 7.3.4 MOZAMBIQUE TRADE OF CREATIVE GOODS TO EU 27

#### BY PRODUCT GROUPS, 2003-2008

		Value (in thousand US\$)					
		2003	2004	2005	2006	2007	2008
<b>All Creative Goods</b>	Imports	7,021	12,633	21,343	15,901	15,527	18,354
	Exports	675	143	231	234	58	221
<b>Art Crafts</b>	Imports	50	93	90	75	46	119
	Exports	1	62	12	16	2	8
<b>Audio Visuals</b>	Imports	9	24	21	22	11	13
	Exports	..	..	..	0	..	0
<b>Design</b>	Imports	1,523	1,263	1,783	1,755	2,356	3,723
	Exports	9	3	4	20	36	5
<b>New Media</b>	Imports	263	126	135	828	397	320
	Exports	..	..	5	0	..	1
<b>Performing Arts</b>	Imports	32	30	49	42	17	15
	Exports	..	..	..	3	0	1
<b>Publishing</b>	Imports	5,117	11,058	19,228	12,375	12,605	14,057
	Exports	2	0	2	3	19	5
<b>Visual Arts</b>	Imports	26	39	37	804	95	109
	Exports	662	78	209	192	0	202

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

Note: .. Data not available or not separately reported

### 7.3.5 MOZAMBIQUE TRADE OF CREATIVE GOODS TO ACP COUNTRIES

#### BY PRODUCT GROUPS, 2003-2008

		Value (in thousand US\$)					
		2003	2004	2005	2006	2007	2008
<b>All Creative Goods</b>	Imports	8,694	11,782	14,438	18,212	17,102	15,290
	Exports	268	234	135	246	1,067	746
<b>Art Crafts</b>	Imports	283	367	326	427	588	476
	Exports	19	2	2	14	39	17
<b>Audio Visuals</b>	Imports	0	1	6	5	1	1
	Exports	..	..	0	0	..	..
<b>Design</b>	Imports	4,617	5,026	5,819	7,233	7,187	8,273
	Exports	118	90	54	79	176	530
<b>New Media</b>	Imports	244	957	567	2,108	1,495	848
	Exports	0	0	4	35	212	3
<b>Performing Arts</b>	Imports	60	95	99	116	69	54
	Exports	3	3	..	12	2	..
<b>Publishing</b>	Imports	3,189	4,948	6,831	7,586	7,348	5,215
	Exports	40	110	24	27	350	44
<b>Visual Arts</b>	Imports	301	388	790	737	414	423
	Exports	87	29	52	77	288	151

Note: .. Data not available or not separately reported

ACP member States: Angola, Antigua & Barbuda, Bahamas, Barbados, Belize, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Democratic Republic of Congo (Kinshasa), Congo (Brazzaville), Cook Islands, Cote d'Ivoire, 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

## 7.3.6 MOZAMBIQUE TRADE OF CREATIVE GOODS WITH CHINA

## BY PRODUCT GROUPS, 2003-2008

		(in thousand US\$)					
		2003	2004	2005	2006	2007	2008
<b>All Creative Goods</b>	Imports	970	1,415	2,496	2,297	2,681	4,228
	Exports	..	9	..	0	0	2
<b>Art Crafts</b>	Imports	68	84	85	243	114	193
	Exports	..	..	..	..	..	..
<b>Audio Visuals</b>	Imports	..	..	1	0	..	..
	Exports	..	..	..	..	..	..
<b>Design</b>	Imports	822	1,232	2,191	1,872	2,276	3,516
	Exports	..	..	..	0	0	0
<b>New Media</b>	Imports	26	1	20	29	46	22
	Exports	..	..	..	..	..	..
<b>Performing Arts</b>	Imports	5	14	24	21	73	16
	Exports	..	..	..	..	..	..
<b>Publishing</b>	Imports	10	54	38	14	82	374
	Exports	..	..	..	..	..	..
<b>Visual Arts</b>	Imports	40	31	137	117	91	108
	Exports	..	9	..	..	..	1

Note: .. Data not available or not separately reported

## 7.3.7 MOZAMBIQUE TRADE OF CREATIVE GOODS WITH PORTUGAL

## BY PRODUCT GROUPS, 2003-2008

		(in thousand US\$)					
		2003	2004	2005	2006	2007	2008
<b>All Creative Goods</b>	Imports	4,442	10,595	16,352	9,500	13,387	14,064
	Exports	73	67	13	73	29	27
<b>Art Crafts</b>	Imports	39	73	66	53	41	113
	Exports	0	60	1	2	..	3
<b>Audio Visuals</b>	Imports	9	24	21	22	11	13
	Exports	..	..	..	0	..	0
<b>Design</b>	Imports	1,047	776	1,094	1,175	1,749	2,895
	Exports	4	0	0	20	28	4
<b>New Media</b>	Imports	58	85	72	225	105	229
	Exports	..	..	..	..	..	..
<b>Performing Arts</b>	Imports	25	29	33	35	14	12
	Exports	..	..	..	..	..	1
<b>Publishing</b>	Imports	3,252	9,586	15,032	7,955	11,373	10,708
	Exports	2	..	1	3	..	3
<b>Visual Arts</b>	Imports	13	22	34	36	92	94
	Exports	66	7	11	49	0	16

Note: .. Data not available or not separately reported

### 7.3.8 MOZAMBIQUE TRADE OF CREATIVE GOODS WITH BRAZIL

#### BY PRODUCT GROUPS, 2003-2008

		(in thousand US\$)					
		2003	2004	2005	2006	2007	2008
<b>All Creative Goods</b>	Imports	742	885	1,428	1,067	1,037	1,236
	Exports	..	42	0	3	4	23
<b>Art Crafts</b>	Imports	..	0	17	29	5	5
	Exports	..	..	..	..	..	1
<b>Audio Visuals</b>	Imports	..	..	..	..	..	..
	Exports	..	..	..	..	..	..
<b>Design</b>	Imports	536	666	859	774	676	879
	Exports	..	..	..	..	4	..
<b>New Media</b>	Imports	0	0	6	1	1	5
	Exports	..	..	..	..	..	..
<b>Performing Arts</b>	Imports	6	49	26	17	2	0
	Exports	..	..	..	..	..	..
<b>Publishing</b>	Imports	199	168	520	236	256	346
	Exports	..	..	..	..	..	..
<b>Visual Arts</b>	Imports	..	2	0	11	97	0
	Exports	..	42	0	3	..	22

Note: .. Data not available or not separately reported

### 7.3.9 MOZAMBIQUE TRADE BALANCE OF CREATIVE GOODS, 2003-2008

		Value (in thousand US\$)					
		2003	2004	2005	2006	2007	2008
<b>Creative Industries</b>	Imports	23,285	32,179	46,637	42,971	44,069	51,378
	Exports	1,198	586	927	625	1,221	4,513

## 7.4 MOZAMBIQUE TRADE OF CREATIVE SERVICES

Creative Services		Value (in thousands)					
		2003	2004	2005	2006	2007	2008
<b>Advertising, market research and public opinion polling</b>	Exports	439	..	7,087	..	..	..
	Imports	812	..	11,239	..	..	..
<b>Research and development</b>	Exports	6,013	..	1,984	..	..	..
	Imports	6,581	..	3,147	..	..	..
<b>Architectural, engineering and other technical services</b>	Exports	1,984	..	1,417	32,117	35,534	47,751
	Imports	38,979	..	2,248	82,582	80,876	46,308
<b>Personal, cultural, and recreational services</b>	Exports	55	162	434	2,319	490	684
	Imports	16	354	871	1,139	686	718
<b>Audiovisual and related services</b>	Exports	..	..	..	..	..	..
	Imports	..	..	..	..	..	..
<b>Other other personal, cultural, and recreational services</b>	Exports	55	162	434	2,319	490	684
	Imports	16	354	871	1,139	686	718
Note: .. Data not available or not separately reported							
Source: UNCTAD Global database on Creative Economy							



## 7.5 WORLD TRADE STATISTICS OF CREATIVE GOODS AND SERVICES

## 7.5.1 CREATIVE GOODS: WORLD EXPORTS BY ECONOMIC GROUP AND COUNTRY/TERRITORY, 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
Other European countries	5539	6525	6782	7750	9211	10367	13.08
Andorra	6	7	10	12	-	-	-
Faeroe Islands	-	-	-	0	0	0	-

Economic group and country/territory	EXPORTS (f.o.b., in millions of \$)						Growth rate (1)
	2003	2004	2005	2006	2007	2008	2003- 2008
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: Oceania</b>	<b>1057</b>	<b>1275</b>	<b>1325</b>	<b>1323</b>	<b>1371</b>	<b>1297</b>	<b>3.60</b>
Australia	780	959	1005	1015	1072	1022	4.96
New Zealand	277	316	320	308	299	275	-0.68
<b>Developing economies: Africa</b>	<b>809</b>	<b>889</b>	<b>981</b>	<b>1361</b>	<b>1520</b>	<b>2220</b>	<b>22.09</b>
<b>Developing economies: Eastern Africa</b>	124	170	182	495	424	364	29.71
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: Middle Africa</b>	-	8	7	2	-	-	-
Cameroon	-	-	1	1	-	-	-
Gabon	-	8	6	0	-	-	-
<b>Developing economies: Northern Africa</b>	293	304	333	384	447	1185	26.72
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: Southern Africa</b>	374	385	406	364	360	443	1.53
Namibia	15	22	21	22	24	35	14.28
South Africa	360	362	385	342	335	408	0.79
<b>Developing economies: Western Africa</b>	17	21	54	116	289	228	84.85
Benin	-	-	-	0	-	-	-
Burkina Faso	-	2	3	-	-	-	-
Cape Verde	-	-	-	-	0	-	-
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>
<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>	<b>8393</b>	<b>10943</b>	<b>11855</b>	<b>13042</b>	<b>14789</b>	<b>17379</b>	<b>14.17</b>
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>	<b>3190</b>	<b>4021</b>	<b>6119</b>	<b>5228</b>	<b>9134</b>	<b>10687</b>	<b>26.94</b>
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	-	-	-	-	-	-	-
New Caledonia	1	1	1	1	1	1	5.43
Papua New Guinea	0	0	-	-	-	-	-
Vanuatu	-	-	-	-	0	-	-
<b>Transition economies: Asia</b>	<b>32</b>	<b>56</b>	<b>77</b>	<b>78</b>	<b>69</b>	<b>54</b>	<b>9.90</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: Europe</b>	<b>1348</b>	<b>1822</b>	<b>2079</b>	<b>2262</b>	<b>2573</b>	<b>3307</b>	<b>17.37</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).							

### 7.5.2 CREATIVE GOODS: WORLD IMPORTS, BY ECONOMIC GROUP AND COUNTRY/TERRITORY, 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
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:</b>	<b>4569</b>	<b>5539</b>	<b>6033</b>	<b>6216</b>	<b>7363</b>	<b>8262</b>	<b>11.62</b>
<b>Oceania</b>							
Australia	3747	4566	4931	5146	6103	7040	12.32
New Zealand	822	973	1102	1071	1260	1222	8.11
<b>Developing economies:</b>	<b>2032</b>	<b>2749</b>	<b>3468</b>	<b>4306</b>	<b>4728</b>	<b>5693</b>	<b>22.12</b>
<b>Africa</b>							
<b>Developing economies:</b>	341	450	542	652	691	857	18.96
<b>Eastern Africa</b>							
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:</b>	-	19	79	77	-	-	-
<b>Middle Africa</b>							
Cameroon	-	-	51	52	-	-	-
Gabon	-	19	28	26	-	-	-
<b>Developing economies:</b>	943	1118	1277	1350	1754	2381	18.83
<b>Northern Africa</b>							
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:</b>	694	1035	1335	1712	1675	1677	19.06
<b>Southern Africa</b>							
Namibia	41	80	84	93	111	125	20.67
South Africa	652	955	1251	1619	1565	1552	18.95
<b>Developing economies:</b>	55	127	234	515	607	778	70.86
<b>Western Africa</b>							
Benin	-	-	-	13	-	-	-
Burkina Faso	-	22	18	-	-	-	-
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:</b>	<b>6683</b>	<b>7437</b>	<b>9140</b>	<b>11522</b>	<b>16862</b>	<b>16007</b>	<b>22.33</b>
<b>America</b>							
<b>Developing economies:</b>	184	413	652	1081	1005	1193	43.05
<b>Caribbean</b>							

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>	<b>4651</b>	<b>4710</b>	<b>5604</b>	<b>6318</b>	<b>7105</b>	<b>7901</b>	<b>12.12</b>
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	-
<b>Developing economies: South America</b>	<b>1848</b>	<b>2314</b>	<b>2884</b>	<b>4123</b>	<b>8752</b>	<b>6912</b>	<b>36.71</b>
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	-
<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>	<b>24146</b>	<b>28315</b>	<b>30421</b>	<b>33413</b>	<b>39501</b>	<b>43631</b>	<b>12.27</b>
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>	<b>2160</b>	<b>2553</b>	<b>3212</b>	<b>3517</b>	<b>3918</b>	<b>3482</b>	<b>11.35</b>
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	-	-	-	-
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							



**7.5.3 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
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
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 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.

note: .. Data not available or not separately reported

## 7.5.4 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	-
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	-	-
Papua New Guinea	-	0	0	-	-	-
Paraguay	7	3	1	0	1	1
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.