

# The Economic Contribution of Copyright Industries in Botswana



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*Disclaimer:* The opinions expressed in this survey are those of the authors and do not necessarily reflect the points of view of the Companies and Intellectual Property Authority.

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## Acronyms and Abbreviations

ABOSPA	Association of Botswana Schools Performing Arts
ARIPO	African Regional Intellectual Property Organization
BEF	Botswana Editor's Forum
BIMTS	Botswana International Merchandise Trade Statistics
BISIC	Botswana International Standards Industry Codes
BLA	Botswana Library Association
BLC	Botswana Library Consortium
BMTHS	Botswana Multi-Topic Household Survey
BoB	Bank of Botswana
BOCRA	Botswana Communications Regulatory Authority
BOFIA	Botswana Film Association
BOMU	Botswana Musician Union
BoP	Balance of Payments
BOVAA	Botswana Visual Arts Association
BTV	Botswana Television
BURS	Botswana Unified Revenue Services
BWP	Botswana Pula
CAC	Constituency Arts Competition
CCI	Core Copyright Industries
CD	Compact Disc
CMO	Copyright Management Organization
CIPA	Companies and Intellectual Property Authority
COSBOTS	Copyright Society of Botswana
CPC	Central Product Classification
CRA	Communication and Regulatory Authority
DSTV	Digital Satellite Television
FTE	Full-Time Equivalent
GDP	Gross Domestic Product
GVA	Gross Value Added
HS	Harmonized System
ICI	Interdependent Copyright Industries
IFEX	International Freedom of Expression Exchange
ISIC	International Standards Industry Codes
MISA	Media Institute of Southern Africa
MITI	Ministry of Investment Trade and Industry
MYSC	Ministry of Youth Empowerment, Sport and Culture Development
MUSUBO	Music Union of Botswana
NDP	National Development Plan
NDSI	Non-Dedicated Support Industries
PAB	Publishers Association of Botswana
PCI	Partial Copyright Industries
PDC	President's Day Competitions
RB	Radio Botswana
SACU	Southern African Customs Union

SADC	Southern African Development Community
SB	Statistics Botswana
TfD	Theatre for Development
TV	Television
UBTT	University of Botswana Travelling Theatre
UN	United Nations
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
VCR	Video Cassette Recorder
WABO	Writers Association of Botswana
WIPO	World Intellectual Property Organization

## Executive Summary

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Over the past few decades, copyright industries have gained prominence because of their contribution to national economies. Studies conducted in several countries have shown that copyright industries are significant contributors to national economies in terms of their relative value added to Gross Domestic Product (GDP), employment and foreign trade. However, in most countries, national accounts do not clearly show the contribution of copyright industries to the national economy. Therefore, to determine the contribution of copyright industries to national economies, appropriate studies must be conducted to measure the contribution of these industries to GDP, employment and foreign trade.

Like other countries, Botswana, acting through the Companies and Intellectual Property Authority (CIPA), has decided to undertake a study to determine the contribution of copyright industries to its economy. The main objectives of the study are to estimate the economic contribution of copyright industries to GDP, employment and foreign trade and to undertake a comparative analysis of the above-mentioned indicators with those of other sectors. The study also proposes policy, strategy and institutional interventions for boosting the growth and development of copyright industries within the economy.

In 2003, the World Intellectual Property Organization (WIPO) published a “Guide on Surveying the Economic Contribution of the Copyright Industries”. It was revised in 2015 and is intended for countries that wish to estimate the contribution of their copyright industries to their national economies. The guide makes it easy to undertake a comparative analysis of the contribution of copyright industries to national economies. The methodologies for conducting this study are based on the 2015 WIPO Guide. The study relies on 2016 data from Statistics Botswana and Bank of Botswana to estimate the contribution of copyright industries to the Botswana economy in terms of value added, employment and foreign trade.

The results of the study indicate that copyright industries make a significant contribution to the national economy of Botswana. In 2016, these industries contributed 5.46 per cent to value added and 2.66 per cent to the total labor force; meanwhile, in foreign trade they contributed 1.28 per cent to exports and 3.47 per cent to imports, yielding a negative trade balance of 1,988.80 million Botswana Pula, as imports exceeded exports by this amount.

Core copyright industries (CPI) contribute the largest share to GDP (47 per cent) and employment (65 per cent). In terms of foreign trade, interdependent copyright industries contribute the largest share (81 per cent) to imports, while partial industries contribute the largest share (39 per cent) to exports.

In terms of their relative contribution to the economy, copyright industries compare well with other economic sectors. For instance, they rank eighth out of 11 sub-sectors in terms of contribution to GDP, surpassing other important sectors such as water and electricity, agriculture and manufacturing. In terms of employment, copyright industries are ranked ninth out of 12 sub-sectors, contributing more than mining and quarrying, finance and insurance and water and electricity.

The contribution of the copyright industries in Botswana compares well with that of other countries, especially in Africa, that have undertaken similar studies. They contribute 5.46 per cent to value added compared to 11.1 per cent in the USA, which is the global highest. In Africa, Botswana's contribution is the highest, followed by Kenya's at 5.3 per cent. In terms of employment, the highest contribution is 11.1 per cent in the Philippines and the lowest is 1.9 per cent, in Ukraine, while Botswana's contribution stands at 2.66 per cent. Compared to other African countries, Botswana contributes the least to employment.

Although copyright industries contribute significantly to the economy of Botswana, the sector is plagued by challenges that inhibit its growth. These challenges include the institutional and legal framework within which copyright industries operate as well as weak associations (e.g., some associations are not fully operational, do not have secretariats and have minimal impact on their members' development).

To improve the performance of copyright industries and enhance diversification of the economy, the following actions are recommended:

1. Several legal instruments (Media Practitioners Act, Sedition Act and Cinematograph Act) must be updated to accommodate current developments.

2. The national policy on language should be developed to encourage publishing in national and mother-tongue languages.
3. A national anti-piracy strategy should be developed and fully implemented.
4. Technical and financial support should be provided to associations (including COSBOTS) to ensure that they are operational and able to play their role of empowering their members.
5. Concerted efforts should be made to speed up the formation of a national arts council that will oversee sector development by creating a conducive operational environment for the industry.
6. Policymakers should be educated on the contribution of copyright industries to the national economy so that they can factor such contribution into the design of sector policies and interventions.
7. The copyright arbitration panel should be established as a matter of urgency.
8. The contribution of copyright industries to the economy of Botswana should be assessed every five years.

# 1. INTRODUCTION

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## 1.1 Background

Over the past few decades, copyright and related industries have gained prominence owing to recognition of their importance to national economies. According to the World Intellectual Property Organization (WIPO) (2015), the terms “copyright industries”, “creative industries” and “cultural industries” are often used interchangeably. However, they are different. Hence, it is useful to define these terms and contextualize the use of the term “copyright industries” in the current study. According to the United Nations Educational, Scientific and Cultural Organization (UNESCO), creative industries are “sectors of organized activity whose principal purpose is the production or reproduction, promotion, distribution and/or commercialization of goods, services and activities of a cultural, artistic or heritage-related nature”. Creative industries are founded on individual creativity, skill and talent and have the potential for wealth and job creation.

Cultural industries are those that produce culturally significant content which is reproduced on an industrial scale. They produce and distribute goods and services, which, at the time they were developed, were considered to have a specific attribute, use or purpose that embodies and conveys cultural expressions, irrespective of their commercial value. Commercialization of cultural industries is based on the creation of copyright, often through national legislation.

Copyright industries are indeed a part of the creative industries, which themselves cover activities founded on individual creativity, skill and talent and have the potential for wealth creation through the generation and exploitation of intellectual property (IP). Copyright is one of the main branches of IP and applies to every literary, scientific and artistic creation, regardless of the mode or form of expression. WIPO defines copyright as a legal term describing rights given to creators for their literary and artistic works. It protects the expression of ideas (not the ideas themselves) and the rights owners against the use of their works without permission. Users are therefore barred by law from using or copying copyright works without the permission of the right holders.

Copyright works include literary and artistic works such as books, music, plays, choreography, photography, films, paintings, sculptures, computer programs and databases. In addition, there are related rights that protect those who assist IP creators in communicating and disseminating their works to the public. The level of dependence on copyright in the different copyright industries is the main criterion that enables a mapping of copyright industries based on the scope of protection under a country’s national law. WIPO (2015) classifies copyright industries into four major categories, namely: core, interdependent, partial and non-dedicated industries. This classification is based on the level of contribution of copyright products to value added. According to WIPO (2015), core industries are those whose entire value added is derived from copyrighted products; interdependent copyright industries are those jointly consumed with core industries and which consequently support the use of copyright content and are dependent on the availability of copyright works; partial copyright industries are those whose value added is not entirely derived from copyrighted works; and non-dedicated support industries are those providing support that includes activities that are not dedicated to copyrighted products. Such classification of industries into four main categories, as outlined in the WIPO Guide, is covered in Chapter 4 of this study.

As stated earlier, copyright and related industries have gained prominence in the past few decades because of their contribution to national economies. In fact, studies carried out in several countries have shown that copyright and related industries are significant contributors to national economies in terms of their relative value added to GDP, employment and foreign trade. For example, the 2014 WIPO Studies on the Economic Contribution of Copyright Industries Overview Report indicates that the global contribution of copyright industries to valued added ranges from 11 per cent in the United States of America to 1.58 per cent in Brunei, while their contribution to employment ranges from 11.1 per cent in the Philippines to 1.9 per cent in Ukraine (WIPO, 2014a). In Africa, studies show that the economic contribution of copyright industries to



value added ranges from 3.5 per cent in Malawi to 5.3 per cent in Kenya, while contribution to employment ranges from 3.5 per cent in Malawi to 5.3<sup>1</sup> per cent in Tanzania (WIPO, 2009; 2012 and 2013).

The national accounts of most countries do not clearly show the contribution of copyright industries to national economies. Therefore, in order to determine the relevant contribution of copyright industries to national economies, it is necessary to conduct appropriate studies, which measure their contribution to GDP, employment and foreign trade. In order to ensure the comparability of results from such studies, WIPO published the “Guide on Surveying the Economic Contribution of the Copyright Industries” in 2003 and revised it in 2015. This guide is intended for countries that wish to estimate the contribution of their copyright and related industries to their national economies.

Like other countries, Botswana has decided to conduct a study to determine the contribution of copyright industries to its economy. The study methodology is based on the WIPO Guide of 2015. It uses data from 2016 to estimate the contribution of copyright industries to value added, employment and foreign trade. The outcome of the study is a comprehensive report resulting from literature review, data collection and analysis and consultations with the relevant institutions, organizations and associations. The results of the study will inform policies and strategies aimed at promoting the growth and development of the country’s copyright sectors.

## 1.2 Objectives of the Study

The main objectives of the study were to:

- (a) quantify the economic contribution of copyright industries in Botswana by estimating their value added to GDP/Gross Value Added (GVA), national employment and revenue from foreign trade (see Chapter 5);
- (b) analyze and elaborate on selected copyright industries of particular importance to Botswana, their national market structure, value chain, demand and supply patterns, labor market, policy framework, the role of collective management organizations and other copyright-related organizations (see Chapters 2, 3 and 7);
- (c) identify the comparative advantages of the copyright industries relative to other industry sectors and major trade partners (see Chapter 6); and
- (d) propose policy, strategy and institutional interventions for encouraging the growth and development of copyright industries in the economy (see Chapter 8).

## 1.3 Scope of the study

The current study estimates the economic contribution of copyright industries in Botswana for the year 2016 and presents their national market structure, value chain and the policy and legal framework within which they operate. In accordance with the WIPO Guide (2015), the following steps were undertaken to meet the objectives of the study:

- (a) Identification and classification of copyright industries. This involved identification of activities that make measurable and quantifiable copyright contributions to the economy of Botswana. The identification followed the one suggested by WIPO (2015), with copyright industries classified as core, interdependent, partial and non-dedicated support industries as indicated in Annexes 1a and 1b;
- (b) Interviews of major stakeholders. Before actual data collection could begin, in-depth interviews were conducted with major copyright industry stakeholders. These included the Bank of Botswana (BoB); Statistics Botswana (SB); Botswana Unified Revenue Services (BURS); Copyright Society of Botswana (COSBOTS); and the Ministry of Youth Empowerment, Sports, and Culture Development (MYSC). The objective of this step was to identify potential sources of statistical

<sup>1</sup> This figure is an average of four years, 2007-2010.

data and to understand the operation of the copyright industry in Botswana in terms of its market structure and value chain;

- (c) Data collection. After the identification of copyright industries, the second step involved actual collection of statistical data from the sources identified in (b) above. The main sources of statistical data used in the study was the official statistics from the SB and BoB.

Measurement of the contribution of copyright industries, analysis and presentation of the results. This step involved the actual calculation of the economic contribution of copyright industries in terms of value added, employment and foreign trade. It also included analysis of the results as well as comparisons with other economic sectors in Botswana and in other countries.

## 1.4 Organization of the Study

The rest of this study is organized as follows:

- (a) Chapter 2 covers the legal framework and policy applicable to copyright industries in Botswana;
- (b) Chapter 3 deals with the main features of the Botswana economy in terms of sectoral contribution to GDP and past economic performance;
- (c) Chapter 4 presents the methodology used for the study, preceded by the methodology developed by WIPO;
- (d) Chapter 5 presents the results of the study and includes the economic contribution of the copyright industries to value added, employment and foreign trade;
- (e) Chapter 6 focuses on a comparative analysis of the contribution of the copyright industries in Botswana relative to other sectors of the economy and other countries.;
- (f) Chapter 7 reviews the status of selected copyright industries; and
- (g) Chapter 8 concludes the study with major policy recommendations for the development of copyright industries in Botswana.

## 2. COPYRIGHT POLICY, LEGAL AND INSTITUTIONAL FRAMEWORK IN BOTSWANA

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### 2.1 Copyright policy

Although there is no specific copyright policy in Botswana, there are several key policies and strategy documents that recognize the importance of copyright industries. For example, the National Vision (2016-2036) acknowledges creative industries as "... an up-coming sector that possesses great potential to create employment, diversify the economy and earn foreign exchange". Through Vision 2036, the country aspires to expand creative industries by developing world-class infrastructure and facilities as well as institutional, legal and regulatory frameworks that protect and support the development of creative industries. Furthermore, the Vision 2036 document undertakes to provide adequate protection of IP rights and indigenous knowledge (Vision 2036 Presidential Task Team, 2016). The National Development Plan 11 (NDP 11) calls for research in indigenous knowledge in order to diversify the economy.

### 2.2 Copyright law

Copyright law in Botswana has been in existence since 1912 when the country adopted the United Kingdom's Copyright Act of 1911. According to Kiggundu (2016), when the Copyright Act of 1911 was formalized in the United Kingdom, it was sophisticated and based on the fully developed copyright industry which already had authors who knew their rights and required protection for their work, theaters, recording studios and publishing houses. The Act was therefore relevant to the UK, which had a relatively well-developed copyright industry but was less relevant to Botswana, whose copyright industry was not yet fully developed.

In 1956, the UK abolished and replaced the 1911 Copyright Act following an increase in the types of works protected by the Act and changes in rights under the Act. The new Copyright Act was then formalized in the UK and passed on to Botswana (WIPO, 1997). The Copyright (Bechuanaland) Order 1965 (S.I. 1965/2009) became effective in Botswana in December 1965. However, it had many shortcomings and limitations and was ill adapted to Botswana's economic and social environment. For instance, the Act did not protect folkloric works, moral rights and neighboring rights (Kiggundu, 2016).

When Botswana became independent in 1966, the 1956 UK Copyright Act remained in force, although there were no copyright societies, recording studios, theaters or even publishing firms. Even with the absence of a copyright industry, the concept of copyright has always been present. For example, individuals considered talented, such as narrators of folktales and poems, would be recognized by being invited on special occasions, offered praise and paid in kind. According to WIPO (1997), this was copyright in action, although Botswana's ancestors did not call it that or even know of a Copyright Act. Therefore, it was necessary for Botswana to have a Copyright Act that would be relevant to the Botswana and their tradition and take into account the slow growth of the copyright industry.

In 1998, as Botswana expanded its copyright relations with the global market, it adhered to the Agreement on Trade-Related Aspects of Intellectual Property Rights (the TRIPS Agreement), the Paris Convention of 1883, and the WIPO Convention of 1970 and became a member of the African Regional Intellectual Property Organization (ARIPO). It also joined the Berne Convention for the Protection of Literary and Artistic Works 1886, the WIPO Copyright Treaty and the WIPO Performances and Phonograms Treaty.

Ratification of the above conventions and agreements obliged Botswana to revise its copyright protection and regulation laws so that levels of protection and the type of works protected would be consistent with international standards. Accordingly, Botswana decided to revise its copyright laws (Kiggundu, 2016). The Copyright and Neighboring Rights Act of 2000 resulted from these reforms and was designed to protect any literary and artistic work created independently of any other work. It was last amended in 2005.

The key legislation that protects copyright works is the Copyright and Neighbouring Rights Act of 2006. There is also the Companies and Intellectual Property Authority Act of 2011, which sets up the Companies

and Intellectual Property Authority (CIPA). The CIPA Act also provides for three offices (the Companies and Business Names Office; the Industrial Property Office; and the Copyright Office), which together constitute CIPA. The Copyright and Neighbouring Rights Act protects literary and artistic works. Article 3(2) of the Act lists the works that are protected, including:

- (a) books, pamphlets, articles, computer programs and other writings;
- (b) speeches, lectures, addresses, sermons and other oral works;
- (c) dramatic, dramatic-musical works, pantomimes, choreographic works and other works created for stage productions;
- (d) stage productions of works referred to in paragraph (a) and of expressions of folklore;
- (e) musical works with or without accompanying words;
- (f) audiovisual works;
- (g) works of architecture;
- (h) works of drawing, painting, sculpture, engraving, lithography, tapestry and other works of fine art;
- (i) photographic works;
- (j) works of applied art; and
- (k) illustrations, maps, plans, sketches and three-dimensional works relative to geography, topography, architecture or science.

The Act (section 4) also protects derivative works, being translations, adaptations, arrangements and other transformations or modifications of works as well as collections of works, provided that they possess originality in terms of selection, coordination or arrangement of their content. The Act also defines the works not protected by copyright.

Sections 7 and 8 respectively grant economic rights to authors and owners of copyrighted works.<sup>2</sup> Economic rights of authors are protected during the life of the copyright holder and a further 50 years after their death, during which period the rights accrue to the inheritor(s) of the copyright. For jointly authored works, economic and moral rights are protected during the life of the last surviving author and an additional 50 years after their death. The provision governing moral rights<sup>3</sup> grants authors the right to authorship of the work through the inscription of their name on the copies and in connection with public use of their work.

There are exceptions and limitations to the exclusive rights of the copyright owners. These are exceptions from the general rules relating to economic rights of the copyright owners in that some forms of reproduction or use of the copyrighted works do not require the permission or authorization of the author (copyright holder). However, sections 13-21 define the various exceptions and how they ought to be applied. These include:

- (a) private reproduction for personal purposes;
- (b) quotations;
- (c) reproduction for teaching;
- (d) reprographic reproduction by libraries and archives;
- (e) reproduction and adaptation of computer programs;
- (f) reproduction, broadcasting and other communications to the public for information purposes;
- (g) temporary reproduction;

<sup>2</sup>Economic rights are rights that allow rights owners to derive financial reward from the use of their works by others. (WIPO,2016).

<sup>3</sup>Moral rights are rights that allow the authors and creators to take certain actions to preserve and protect their work, (WIPO, 2016).



- (h) importation for personal purposes; and
- (i) display of works.

### 2.3 Institutional framework of copyright protection

The institution that has primary responsibility for copyright administration in Botswana is CIPA, a parastatal institution established through an Act of Parliament (the Companies and Intellectual Property Authority Act, 2011). Part V of the CIPA Act sets out the institutional framework of CIPA. The Act also lists the functions of each of the offices.

Although it is established by the CIPA Act, the Copyright Office is also established and mandated under Part III A of the Copyright and Neighbouring Rights Act. The Copyright Office is headed by a Copyright Administrator. The primary role of the Copyright Administrator is to administer the Copyright and Neighbouring Rights Act as provided for under section 22B of the Act and as directed by the Minister of Investment, Trade and Industry (MITI).

The Copyright Office plays an advisory role to the Government and its agencies on all matters pertaining to copyright, including the negotiation and implementation of bilateral and multilateral agreements between Botswana and other countries. It also undertakes public education and promotes public awareness on copyright matters. Furthermore, the Copyright Office maintains an effective database of authors and their works, including a register of works published in Botswana. Section 35G provides for the imposition of a levy on both imported and locally-manufactured technical devices (blank sound and audiovisual carriers, compact discs and any other equipment that can be used to record copyright-protected material). The proceeds from this levy are deposited into a fund administered by the Copyright Office.

Apart from establishing the Copyright Office, the Copyright and Neighbouring Rights Act provides for the appointment of a Copyright Arbitration Panel tasked with the settlement of disputes under the Act. The panel comprises at least three up to a maximum of five members and is to be chaired by an attorney with at least seven years of experience or someone who has held judicial office in Botswana. The other members of the panel should be people who are versed in copyright matters. However, to date, the panel is yet to be established.

Section 36A of the Copyright and Neighbouring Rights Act establishes COSBOTS, a non-profit making company limited by guarantee to perform the functions of a collective administration body. The responsibilities of COSBOTS include the negotiation and granting of licenses to copyright owners, the setting of royalty rates in line with acceptable international standards and the collection and distribution of royalties to the appropriate copyright owners.

Although the Act establishes COSBOTS as a collective administration body for various categories of copyrighted works, the institution's current set-up is such that it only focuses on the music industry, but it will soon broaden its services to other copyright industries. COSBOTS was established in 2008 and became operational in 2011 following approval of the rules and regulations governing its operations. The two sets of rules, namely "Rules on Licensing of Musical Works" and "Membership; Distribution Rules and Classes in Respect of the Copyright Society of Botswana", were approved by the Copyright Administrator on October 24, 2011 in conformity with section 36A.3(b) of the Copyright and Neighbouring Rights Act. The rules are due to be reviewed to, *inter alia*, align the tariffs with the realities of the local market. Other rules are being developed to commence the collection and distribution of royalties for other copyright works. The intention is to gradually roll out tariffs collection for other copyright works and secure the human and financial resources needed to exercise the mandate covering other copyright works.

Section 37 of the Copyright and Neighbouring Rights Act empowers the Minister to lay down regulations for implementing the provisions of the Act. The Copyright and Neighbouring Rights Regulations of 2007 define the administrative procedures for licensing of copyright societies in accordance with the Act. The regulations also set out the procedures for investigating suspected infringement of the rights protected under the Act. Furthermore, the regulations define the procedure for issuing the hologram and accreditation of producers and importers of sound and audio-visual recordings.

The fourth schedule of the regulations prescribes the levies on technical devices. Technical devices, according to the Act, are “blank sound and audio-visual carriers, compact discs and equipment capable of being used to copy protected materials”. The Finance and Audit Act establishes the Copyright and Neighbouring Rights (Levy on Technical Devices) Fund, which collects the levy imposed on imported and locally manufactured technical devices. The levy collected is used for the professional development of authors and publishers of copyrighted works. The Permanent Secretary in the Ministry of Investment, Trade and Industry (MITI) appoints a committee to administer the levy. The committee is chaired by the Copyright Administrator.

## 2.4 Summary

Copyright law in Botswana dates back to the colonial period when legislation was enacted from the UK. Such legislation was not relevant to Botswana as it was developed for the UK, which had a relatively well-developed copyright industry compared to Botswana. Subsequently, Botswana entered into regional and international agreements that obliged it to revise its copyright laws and type of works protected in line with international standards. This resulted in the formulation of the Copyright and Neighboring Rights Act of 2000 that was revised in 2005 to become the Copyright and Neighbouring Rights Act of 2006. According to Kiggundu (2016), this law takes into account Botswana’s social, cultural and economic development. It set up institutions mandated to guide the development of copyright industries in Botswana.

Despite the existence of laws creating institutions that enhanced the development of copyright industries in Botswana, some institutions such as the Copyright Arbitration Panel have not yet been formed, while others such as COSBOTS are yet to fulfil their mandate. Some of the laws and regulations such as the Media Practitioners Act, Sedition Act and Cinematograph Act are either outdated or constrain industry stakeholders. Hence, they need to be reviewed.



### 3. MAIN FEATURES OF THE BOTSWANA ECONOMY

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Botswana is located at the center of Southern Africa, positioned between South Africa, Namibia, Zambia and Zimbabwe. After gaining independence in 1966, Botswana rapidly became one of the world's development success stories with significant mineral wealth, good governance and prudent economic management. With a relatively small population of just over two million inhabitants, Botswana graduated to upper middle-income status in the early 2000s. Its impressive economic record is founded on diamond mining, prudent fiscal policies, international financial and technical assistance and a cautious foreign policy (World Bank, 2018).

In order to foster economic growth, the Government of Botswana has implemented various strategies over the years. The latest National Development Plan (NDP 11) runs from April 2017 to March 2023. Like other recent NDPs, NDP 11 focuses on economic diversification. The country aspires to achieve such diversification in the face of declining fiscal revenues (relative to GDP) and continued expectations of high levels of government provision of infrastructure, services and social safety nets.

Botswana's current Vision 2036 is also consistent with the global agenda for sustainable development and the principles of Africa Agenda 2063, to ensure that the country pursues its national aspirations in a manner that guarantees the attainment of these global and regional goals. Both Vision 2036 and NDP 11 contain commitments to transform the country into a more diversified, private-sector-led, outward-looking open economy that is integrated with global markets; which is, indeed, the right recipe for ensuring sustained growth. The Pillars of Vision 2036 are sustainable economic development; human and social development; sustainable environment; and governance, peace and security. As mentioned earlier, Vision 2036 recognizes the important role that creative industries could play in economic diversification. Thus, the vision perceives copyright industries as one avenue through which economic diversification, economic growth and job creation could be achieved.

Botswana is heavily dependent on the mining sector and its contribution to GDP has been fluctuating over the years, averaging 22.9 per cent between 2004 and 2016 and 18 per cent by the end of 2017 (BoB, 2017). The sector is highly capital-intensive and thus contributes very little to employment.

Table 3-1 presents Botswana's GDP per economic activity for 2016. It shows that mining is the biggest contributor to GDP (20.5 per cent), followed by trade, hotels and restaurants (18.2 per cent) and general government (14 per cent). The lowest contributors are water and electricity (0.2 per cent) followed by agriculture (2 per cent). Although agricultural sector contribution to GDP is low, the sector remains crucial as the dominant livelihood for most rural dwellers who have no alternative employment opportunities (Republic of Botswana, 2003).

**Table 3-1: Botswana's GDP per economic activity - (2016)**

Economic activity	Value (million Pula <sup>4</sup> )	Per cent
Agriculture	3,496	2.0
Mining	34,913	20.5
Manufacturing	8,860	5.2
Water and electricity	395	0.2
Construction	10,575	6.2
Trade, hotels and restaurants	31,021	18.2
Transport and communication	9,643	5.7
Financial and business services	23,350	13.7
General government	23,927	14.0
Social and personal services	9,259	5.4
<b>Total value added</b>	<b>155,438</b>	<b>91.1</b>
<b>Adjustment items</b>	<b>15,151</b>	<b>8.9</b>
<b>Total</b>	<b>170,590</b>	<b>100</b>

Source: Statistics Botswana, 2017a

Table 3-2 presents the percentage annual change in real GDP per economic activity, showing that some sectors recorded negative growth in 2012, including water and electricity, agriculture and mining. Real economic growth was negative in 2015, whereas it had exceeded 4 per cent in preceding years.

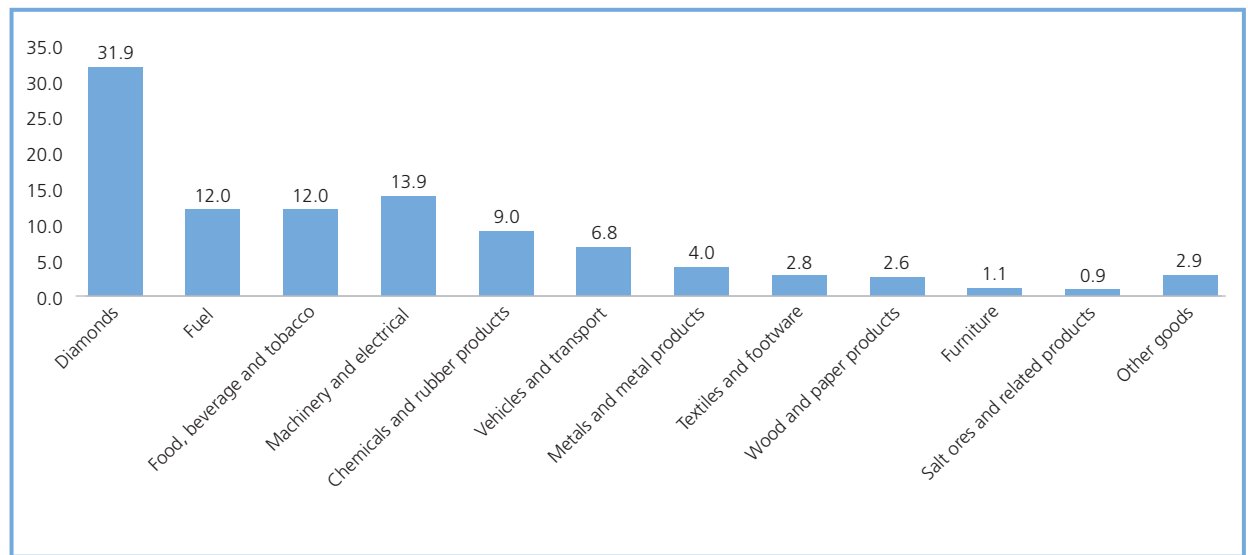
**Table 3-2: Annual per cent change in real GDP per economic activity**

Economic activity	2012	2013	2014	2015	2016
Agriculture	-8.5	1.3	-0.4	0.3	0.5
Mining	-5.8	24.2	0.5	-19.6	-3.5
Manufacturing	3.7	6.5	0.5	3.2	1.6
Water and electricity	-27.5	67.5	-55.8	7.0	95.2
Construction	14.4	4.1	3.7	4.0	4.2
Trade, hotels and restaurants	6.8	16	10.7	-3.9	13.5
Transport and communications	10.9	7.6	9.8	4.5	6.6
Financial and business services	9.1	8.7	2.7	4.6	3.3
General government	2.8	6.0	4.6	3.3	2.4
Social and personal services	10.7	8.0	4.2	3.6	3.5
<b>Total value added</b>	<b>4.5</b>	<b>11.8</b>	<b>4.1</b>	<b>-2.0</b>	<b>4.9</b>
<b>Adjustment items</b>	<b>4.3</b>	<b>7.7</b>	<b>4.9</b>	<b>1.1</b>	<b>0.0</b>
<b>Total GDP</b>	<b>4.5</b>	<b>11.3</b>	<b>4.1</b>	<b>-1.7</b>	<b>4.3</b>

Source: Statistics Botswana, 2017a

The 2017 Botswana International Merchandise Trade Statistics (BIMTS) report indicates that Botswana recorded a trade surplus of 1,134.5 million Pula in May 2017. The trade surplus was influenced by the high value of diamond exports, while imports of the same commodity recorded a low value. Figure 3-1 presents the breakdown of major imports in Botswana.

<sup>4</sup>BWP is the Botswana Pula, the currency of Botswana.

**Figure 3-1: Breakdown of major imports in Botswana (percent)**

Source: Statistics Botswana, 2017b

The breakdown of principal commodity imports shows that diamonds contributed most to total imports (5175.6 million Pula) (31.9 per cent or 1651.4 million Pula), followed by machinery and electrical equipment (13.9 per cent or 718.4 million Pula). It is important to note that diamonds are imported back into the country after beneficiation. Food, beverages and tobacco as well as fuel each contributed 12 per cent or 622.5 million Pula and 620.7 million Pula respectively. The other commodity groups that made a significant contribution were chemicals and rubber products (9 per cent or 463.6 million Pula) as well as vehicles and transport equipment (6.8 per cent or 653.6 million Pula) (Statistics Botswana, 2017b).

In terms of trade, the bulk of the mining output (diamonds) accounted for 92.5 per cent of total exports, with Asia being the biggest importer of Botswana diamonds. As regards exports to the Southern African Customs Union (SACU) region, valued at 739.0 million Pula in 2016 and accounting for 14.3 per cent of total exports, Namibia is the biggest consumer of Botswana diamonds in the region.

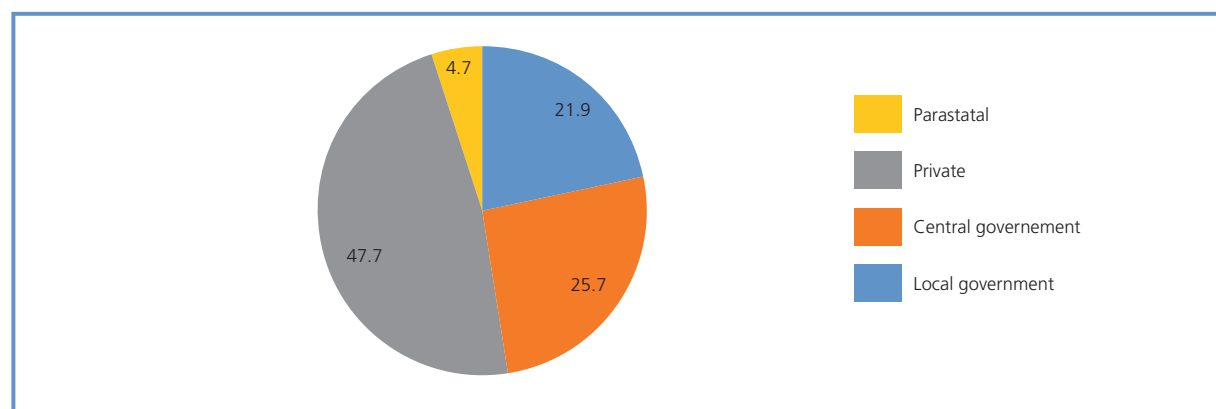
**Table 3-3: Principal exports composition**

Principal exports	Percentage
Diamonds	92.5
Machinery and electrical equipment	1.8
Meat and meat products	1.1
Vehicle and transport equipment	1.0
Others	3.4

Source: Statistics Botswana, 2017b

Figure 3-2 presents formal employment per sector, with the private sector having the largest share (47.7 per cent), followed by the central government (25.7 per cent). Local government entities and parastatals accounted for 21.8 per cent and 4.8 per cent respectively. A closer look at the figure shows that formal employment is dominated by the government (central government, local government and parastatals), with 52.3 per cent.

**Figure 3-2: Employment per sector in Botswana (percent)**



Source: Statistics Botswana, 2017d

Table 3-4 presents the latest (2009/10) household consumption expenditure per item as a percentage of total household expenditure. Household expenditure patterns can give an indication of the demand for copyrighted products and services in an economy. The table shows that the highest expenditure (20.6 per cent) is on transport, followed by food (17.7 per cent), housing (13.57 per cent), household goods and services (8.14 per cent) and clothing and footwear (7.67 per cent). Thus, sectors with potential copyrightable activities such as clothing, footwear, recreation and culture consume a significant portion of household expenditure.

**Table 3-4: Household consumption expenditure per item – (2009/10)**

Type of consumption expenditure	Percentage
Food	17.7
Alcohol and tobacco	9.0
Clothing and footwear	7.67
Housing costs	13.6
Household goods and services	8.1
Medical/health care	0.9
Transport	20.6
Communication	5.3
Recreation and culture	4.5
Education	1.6
Restaurants and hotels	2.6
Miscellaneous	8.4
<b>Total</b>	<b>100</b>

Source: Statistics Botswana, 2010.

## 4. METHODOLOGY AND DATA SOURCES

This chapter presents the methodology used to achieve the objectives of the study. In line with the terms of reference, the methodology of the study is based on the WIPO Guide on Surveying the Economic Contribution of Copyright Industries (WIPO, 2015). The guide provides information on how to structure the research and classify copyright industries, as well as the measures needed to analyze and present the results.

A study on the economic contribution of copyright industries measures their contribution in terms of value added, employment and external trade for industries that are influenced by copyright. In accordance with the WIPO Guide, the following steps were undertaken to achieve the objectives of this study:

- (a) identification and classification of copyright industries;
- (b) data collection; and
- (c) data analysis and presentation of the survey results.

### 4.1 Identification and classification of copyright industries

#### 4.1.1 Identification of copyright industries

The main objective of this step is to present a comprehensive and credible picture of the activities that make measurable and quantifiable copyright contributions to the economy of Botswana. According to WIPO (2015), copyright industries are those involved in the creation, production and manufacturing, performance, broadcasting, communication and exhibition or distribution and sale of works and other protected subject matter. The WIPO Guide also recognizes that copyright industries can be divided into “core” and “non-core” copyright industries based on the level of copyright protection in the products and services produced. Furthermore, non-core industries can be further classified into interdependent, partial and non-dedicated support industries. Each of these categories is briefly described below as follows:

- (a) Core copyright industries are those wholly engaged in the creation, production and manufacturing, performance, broadcast, communication and exhibition or distribution and sale of works and other protected subject matter;
- (b) Interdependent copyright industries are those engaged in the production, manufacture, and sale of equipment whose function is wholly or primarily to facilitate the creation, production or use of works and other protected subject matter;
- (c) Partial copyright industries are those in which a portion of the activities is related to works and other protected subject matter and may involve creation, production and manufacturing, performance, broadcast, communication and exhibition or distribution and sales; and
- (d) Non-dedicated support industries are those in which a portion of the activities is related to facilitation, broadcast, communication, distribution or sale of works or other protected subject matter and whose activities have not been included in the core copyright industries.

Table 4-1 shows a list of the identified copyright industries in Botswana based on the above classifications suggested by the WIPO Guide.

**Table 4-1: List of copyright industries in Botswana**

Category	Groups
Core copyright industries	Press and literature
	Music, theatrical production, operas
	Motion picture and video production
	Radio and television
	Photography
	Software, database and computer games
	Visual and graphic arts
	Advertising
	Copyright collecting societies
Interdependent copyright industries	TV sets, VCRs, radios, CD players, cassette players, electronic game equipment
	Computers and equipment
	Musical instruments
	Photography and cinematographic instruments
	Photocopiers
	Blank recording material
	Paper
Partial copyright industries	Apparel, textiles and footwear
	Jewellery and coins
	Other crafts
	Furniture
	Household goods, china and glass
	Architecture, engineering, surveying and interior design
	Toys and games
	Museums
Non-dedicated industries	General wholesale and retailing
	General transportation
	Telecommunication

Source: Computed from WIPO, 2015

#### 4.1.2 Classification of copyright industries

After identifying industries according to the WIPO classification, the next step was to compare the International Standard Industry Classification (ISIC) codes used by WIPO with the Botswana International Standard Industry Classification (BISIC) codes used by SB to collect economic data for different industries. This step is important because it addresses the level of compatibility of industry statistics with the information needed to calculate value added. Annex 1b shows the comparison between the BISIC and WIPO ISIC codes, which are similar to ISIC Rev 4 Codes. As shown in the Annex, the BISIC and ISIC codes generally correspond to each other with very few instances where there are discrepancies. The study used ISIC Rev 3.1 for the GDP contribution calculation and ISIC Rev 4 for the employment and trade calculation.



Annexes 1a and 1b describe the WIPO (2015) categories (core, interdependent, partial, and non-dedicated) and the main groups and related subgroups of industries in these copyright categories. This means that an activity in the WIPO sub-groupings may be mapped in two or more industry classes in ISIC and one activity in the ISIC can be mapped to many activities in the WIPO sub-groupings. In either case, the research team identified the most appropriate classification in reference to the classifications from SB.

The research team noted that some economic activities codes were overlapping in more than one copyright sub-category in the WIPO classification. Overlapping of codes can lead to overestimation of the contribution of copyright industries. To address this, the team took the total value of the particular code and divided it by the number of times it appeared in the WIPO classification. This attributes an equal portion of the code to each economic activity under which it appears. For example, ISIC Rev. 3.1 code 9214: dramatic arts, music and other arts activities had a total GDP contribution of 93.8 million Pula and appeared eight times across different sub-sectors. In order to avoid double counting, the code was given a GDP value of 11.7 million Pula each time it appeared (i.e., 93.8 divided by 8).<sup>5</sup>

## 4.2 Data collection

### 4.2.1 Data sources

This study relied mainly on secondary data to estimate the economic contribution of copyright industries to the economy of Botswana. The main data sources were SB and BoB. SB collects quarterly data on the performance of the economy and the study used 2016 national accounts data. For employment, the study used data from the Botswana Multi-Topic Household Survey (BMTHS) of 2015/16 compiled by Statistics Botswana. The main objective of the 2015/16 BMTHS was to provide a comprehensive set of indicators for the labor market and poverty. The 2015/16 BMTHS comprises 16 modules including the one covering employment status. This was the module used to estimate the contribution of copyright industries to employment in Botswana. While there are several limitations to using household surveys to estimate industry-specific performance, the benefit to this study is that both the informal and formal activities within the economy are covered.

The BMTHS measures employment on a full-time equivalent (FTE) basis. The WIPO Guide acknowledges that in many copyright industries, employment is not available on a permanent or full-time basis. Hence, it should ideally be measured based on FTE –the measure used to show the workload of an employee spread equitably across different environments. FTE provides a measure of total full-time employees and is obtained by using full-time measurement for part-time employees. This is measured as the total number of paid hours in a given period of time as a ratio of total number of hours within that period.

The data used to estimate foreign trade in the copyright industries were obtained from the BoB balance of payments data (used as a proxy for trade in services) and SB merchandise trade (trade in goods) from the BIMTS for 2016.

### 4.2.2 Collection of information on industry structure and value chain

In addition to secondary data, primary data were collected through in-depth interviews and focus group discussions with selected stakeholders in the copyright industry of Botswana. These stakeholders included the COSBOTS, CIPA, MITI, MYSC and associations in the copyright industry. The purpose of the in-depth interviews was to collect qualitative data from policymakers and from those affected by these policies in order to get an insight into how the industry operates. Focus group discussions were also conducted to collect qualitative data. The stakeholders with whom focus group discussions were held included associations, societies and individual participants in the copyright industries.

The data collected from the in-depth interviews and focus group discussions were used to develop the national market structure as well as the value chain of copyright industries in Botswana. The development of the value chain encompassed the demand and supply patterns, policy framework and the role of collective action groups and other copyright-related organizations. The interviews and focus group discussions were also used to provide insight into policies, strategies and institutional arrangements supporting the development and growth of copyright industries.

<sup>5</sup>These calculations are further differentiated by the copyright factors under different sub-sectors.

## 4.3 Data analysis

### 4.3.1 Calculation of economic contribution indicators

The economic contribution of copyright industries to the economy of Botswana was estimated following the WIPO Guide. This included the estimation of value added as well as contribution to employment and foreign trade. GDP is a measure of all final output from all productive activities within an economy. There are three equivalent methods used to measure GDP. These are the value added or production, income and expenditure approaches. The choice of one method over the other depends on data availability. This study adopted the value-added or the GVA approach, where GDP (at basic prices) is defined as the difference between output and intermediate consumption. Thus, GDP is measured as the sum of the value added of all industries, companies or establishments.

Before estimating the value added, it is vital to ensure that all the relevant data have been compiled. Data that allow the cost structure to be analyzed are needed to establish the value added for specific economic activities. Many of the economic activities classified under copyright industries in the WIPO Guide are found in the manufacturing and the service sectors. Statistics Botswana reports Value-Added GDP on a quarterly basis using the Botswana ISIC Rev. 3 and 3.1. Hence, the contribution of copyright industries was calculated using BISIC Rev. 3.1. Accordingly, the GVA of copyright industries, as a percentage of GDP, is used in this study as one of the indicators for measuring their contribution to Botswana's economy. The difference between GVA and GDP values is that GDP values are inclusive of adjustable items such as taxes on imports, taxes on production and subsidies on production.

Employment is one of the key indicators used in the economic analysis of productive activities, especially copyright industries because they are labor-intensive. There are several measurements of employment. The WIPO Guide recommends three sources of data to be used for measuring employment in the copyright industry, namely (i) data sourced from industry-specific studies; (ii) data from census results; or (iii) data from input-output tables.

To measure the contribution of copyright industries to foreign trade, the study used trade data on goods and services from the Bank of Botswana as well as data on exports and imports from the BIMTS provided by Statistics Botswana. The data are recorded in HS 2012. Hence, to use the data, the ISIC codes had to be converted to CPC2.0 as provided by the WIPO Guide and subsequently to HS 2012. This process was necessary to determine the contribution of copyright industries to merchandise trade. Data on trade in services were not sufficiently disaggregated. This posed several challenges in estimating the contribution of copyright industries to trade in services. Trade in services was estimated based on data provided by the BoB using the BoP reports. The WIPO Guide acknowledges that it is not always easy to distinguish between trade in goods and trade in Services in the copyright industry. Consequently, this study did not attempt to make separate estimates for trade in goods and services. The trade balance was estimated by deducting imports from exports.

### 4.3.2 Determination of copyright factors

Copyright industries make different contributions depending on their classification. Consequently, the WIPO Guide calls for the allocation of appropriate factors for each classification based on the proportion of a specific industry that can be attributed to copyright or level of dependence on copyright. These factors are known as copyright factors and range from 0 to 1 inclusive, with core industries which produce products and works and other protected subject matter given a value of 1, while industries that have nothing to do with copyright are given a value of 0. Meanwhile, the value for interdependent, partial and non-dedicated support industries lies between 0 and 1.

Two approaches can be used to determine the appropriate copyright factors for partial and non-dedicated support industries. The first approach is to use the scale of activity associated with each component and the second approach uses international comparisons as a key source of information. This approach requires survey data to establish the amount of money spent on purchases. However, it was not used because of the time and financial constraints that hamper the conduct of a survey that would establish the share of specific industries attributable to copyright or the level of dependence on copyright.

Under the second approach, consideration was given to selecting countries having a legal framework and economic structure similar to that of Botswana. The copyright factors for partial copyright industries were therefore determined by taking the average of copyright factors used in Kenya, Tanzania and Singapore. Kenya and Tanzania were chosen because they have copyright laws similar to those of Botswana, while Singapore was chosen because a majority of countries has used the copyright factors obtained from the Singapore study.

Following the practice adopted in other countries (Kenya, Tanzania, Malawi and Ethiopia), interdependent copyright industries were given a copyright factor of 1 since they have a large share of copyrighted activities and because there is a lack of the data needed to determine the proportion of activities in the interdependent industries that are copyrighted using the weighting method suggested in the WIPO Guide.

Table 4-2 shows the copyright factors used in the Botswana study. For the non-dedicated support industries, the formula provided in the WIPO (2015) Guide was used. The basis for the formula is that the proportionate contribution of copyright industries to distribution industries is equivalent to the proportionate contribution of copyright industries to the total of non-distribution industries. Thus, the copyright factor to be derived in non-dedicated support industries is the aggregate of the value in the core, interdependent and partial industries as a ratio of non-distribution GDP; where the non-distribution GDP refers to GDP minus value of general transportation plus general wholesale and retail plus telephony and internet. Thus, the copyright factor for non-dedicated support industries (NDSI) was calculated using the following formula:

$$\text{NDSI Factor} = \text{GDP for (Core, Interdependent and Partial)} \div \text{Non Distribution GDP} \quad (1)$$

$$\text{Non Distribution GDP} = \text{Total GDP} - D + \sum_1^3 d_i \quad (2)$$

Where D = (value added of general transportation plus general wholesale and retail plus telephony & internet),  $d$  is value added of distribution industries and  $i$  is the core, interdependent and partial sub-sectors.

Therefore:

$$\text{NDSI Factor} = (4355.47 + 2918.69 + 510.15) \div (170588.89 - 28580.2 + 3701.34)$$

$$\text{NDSI Factor} = 0.0534$$

**Table 4-2: Copyright factors used for the Botswana study**

Copyright industries	Copyright factor
<b>Core copyright industries</b>	
Press and literature	1
Music, theatrical production, operas	1
Motion picture and video production	1
Radio and television	1
Photography	1
Software, databases and computer games	1
Visual and graphic arts	1
Advertising services	1
Copyright Collecting Societies	1
<b>Interdependent copyright industries</b>	
TV sets, radios, VCRs, CD players, DVD players, electronic games equipment and other similar equipment	1
Computers and equipment	1
Musical instruments	1
Photographic and cinematographic instruments	1

*continued*

Photocopiers	1
Blank recording material	1
Paper	1
<b>Partial copyright industries</b>	
Apparel, textiles and footwear	0.0048
Jewelry and coins	0.1145
Other crafts	0.4150
Furniture	0.3036
Household goods, china and glass	0.0194
Wall coverings and carpets	0.0174
Toys and games	0.4392
Architecture, engineering, surveying	0.0887
Interior design	0.0887
Museums	0.500
<b>Non-dedicated support industries</b>	
General wholesaling	0.0534
General transportation	0.0534
Telecommunications	0.0534

Source: WIPO Guide 2015 and figures Computed by Author

### 4.3.3 Copyright factors used in other African countries

As indicated earlier, and like most countries, Botswana has used a copyright factor of 1 for both the core and interdependent copyright industries. Table 4-3 compares the copyright factors used by other African countries with those used in this study for the partial copyright industries and non-dedicated support industries. As indicated in the table, the copyright factors used in the Botswana study compare well with those used in other African countries.

**Table 4-3: Comparisons of Botswana copyright factors with those of African countries that conducted the study**

Sub-sector	Botswana	Tanzania	Malawi	South Africa	Kenya	Ethiopia
<b>Partial copyright industries</b>						
Apparel	0.0048	0.0069	0.043	0.004	0.0045	0.05
Footwear	0.0048	0.0067	0.043	0.004	0.0044	0.05
Textiles	0.0048	0.0049	0.043	0.004	0.0044	0.05
Jewelry and coins	0.1145	0.1192	-	0.1	0.1414	
Household goods, china and glass	0.0194	0.0468	0.05	0.006	0.0055	0.05
Furniture, fittings and furnishings	0.3036	0.1974	0.038	0.1	0.2933	0.045
Architecture, engineering, surveying	0.0887	0.0915	0.10	-	0.0915	0.1
Interior design	0.0887	-	-	0.420	-	0.083
<b>Non-dedicated support industries</b>						
	0.0534	0.04	0.0315	0.057	0.048	0.047



#### 4.4 Data challenges and limitations of the study

The research team encountered several challenges during data collection and resolved the majority of them as follows:

The WIPO 2015 guide recommends the use of surveys as the optimal method for estimating copyright factors tailored to the unique features of the copyright industry in each country. However, because of time and financial constraints, this study did not employ the survey method to estimate copyright factors, but rather made a comparison with the methods used in other countries to determine the copyright factors for Botswana. The limitation in this method is that, it could inadvertently carry over the mistakes and errors from other countries' estimations.

Data from SB National Accounts are currently reported using Botswana ISIC Rev 3 and 3.1. Hence some of the data were over-aggregated. We note that most copyright activities (particularly core copyright industries) are more disaggregated with BISIC Rev. 4 than with Rev. 3.1, and this could lead to overestimation/underestimation of the contribution of copyright industries to GDP.

Employment data could potentially be covered in three surveys, namely the Informal Employment Survey, Formal Employment Survey and BMTHS. Although the three surveys used BISIC Rev.3, 3.1 and 4 respectively, this study used data from BMTHS only. The BMTHS, as the name suggests, is a household survey. Consequently, it prioritizes household representation and not necessarily the representation of industries. Hence, there is missing data for several codes. This might have led to underestimation of the contribution of copyright industries to employment. The following are the missing codes from BMTHS results:

- 1391 – Manufacture of knitted and crocheted fabrics
- 1392 – Manufacture of made-up textile articles, except apparel
- 1820 – Reproduction of recorded media
- 2620 – Manufacture of computers and peripheral equipment
- 2630 – Manufacture of communication equipment (inc. radio and TV studio and broadcasting equipment)
- 2640 – Manufacture of consumer electronics (inc. TVs, VCRs, DVDs, Hi-Fis, consoles)
- 2670 – Manufacture of optical instruments and photographic equipment
- 2680 – Manufacture of magnetic and optical media.
- 2817 – Manufacture of office machinery and equipment (inc. photocopy machines)
- 3212 – Manufacture of imitation jewelry and related articles
- 3240 – Manufacture of games and toys
- 4649 – Wholesale of other household goods (inc. toys)
- 4651 – Wholesale of computers, computer peripheral equipment and software (Inc. computers and computer equipment)
- 4652 – Wholesale of electronic and telecommunications equipment and parts (Inc. blank material)
- 4742 – Retail sale of audio and video equipment in specialized stores
- 5021 - Inland Passenger Water Transport
- 5022 - Inland Freight Water Transport
- 5811 – Book publishing
- 5820 – Software publishing

5913 – Motion picture, video and television program distribution activities

5914 – Motion picture projection activities

7722 – Renting of video tapes and discs

7729 – Renting and leasing of other personal and household goods (inc. furniture)

7730 – Renting and leasing of other machinery, equipment, and tangible goods (inc. profess. radio and TV equip.)

9412 – Activities of professional membership organizations (inc. associations of specialists engaged in cultural activities)

49499 – Activities of other membership organizations n.e.c. (inc. craft and collector's clubs)

Although an attempt was made to obtain the missing data from the Botswana Unified Revenue Service (BURS), this was not possible owing to the lack of data comparability in the reporting system between BURS and SB.

Furthermore, the research team notes that a significant proportion of copyright activities in Botswana as in other developing countries is conducted in the informal sector. Collecting informal sector data is normally challenging unless a survey is conducted to collect data from all copyright stakeholders.

Estimating average wages in the copyright industry was not possible, as the data from all surveys did not include incomes. Moreover, the BURS could not provide data on employment and incomes in copyright industries because the codes used were very old and consequently failed to match the current codes used by SB.

Trade in services data in Botswana is evidently not reported. The research team had to rely on balance of payments data from the BoB, retrieved from the International Transaction Reporting System, which could not be satisfactorily disaggregated. This data does not follow any international standard classification recommended by the 2015 WIPO Guide and might have led to the underestimation of CBI trade in services.

The SB reported the merchandise data from HS2012. The research team converted the HS2012 to the Central Product Classification (CPC2.0) and then converted CPC2.0 to ISIC Rev. 4. These conversions were done in accordance with the recommended United Nations (UN) Correspondence tables as prescribed by the WIPO 2015 Guide. We note that there could have been some statistical errors in the conversion process.

To estimate the contribution of copyright industries to the economy, the three variables (GDP, employment and foreign trade) were considered. The synergy between these three variables presents a more holistic view of the industry. In this study, the synergy between the variables was minimal since their classification varied (ISIC 3.1 for GDP, ISIC 4 for employment and converted ISIC 4 for trade merchandise).

As noted earlier, Chapter 7 (Development of selected core copyright industries in Botswana) deals with qualitative data mainly obtained from in-depth interviews and focus group discussions with industry stakeholders. Some of the institutions and associations were not keen to respond to invitations to participate in the study.



## 5. CONTRIBUTION OF COPYRIGHT INDUSTRIES TO THE NATIONAL ECONOMY OF BOTSWANA

The economic contribution of copyright industries is estimated using three key summary indicators, namely: value added, employment and trade balance. The value-added share is the percentage contribution to GDP (at current prices); the employment share is the percentage contribution to the total labor force; and the trade balance is total exports less imports of copyrighted goods and services. These measures allow for an inclusive comparative analysis of the performance of copyright industries within the economy. The total estimated contribution of copyright industries to the economy of Botswana in 2016 was as follows:

- 9,309.77million Pula (9.3 billion Pula) of value added or 5.46 per cent of GDP;
- 18,407 employees or 2.66 per cent of the national labor force; and
- 1,331.98million Pula worth of exports and 3,320.78 million Pula worth of imports or 1.28 per cent of national exports and 3.47 per cent of national imports, yielding a negative trade balance of 1,988.80 million Pula. Hence, Botswana is a net importer of copyrighted products and services.

Table 5-1 below shows the contribution of copyright industries to the national economy of Botswana. It indicates that core copyright industries (CCI) contributed more to value added (47 per cent) and employment (65 per cent). In terms of exports, partial copyright industries contributed a larger share (39 per cent), followed by non-dedicated copyright industries (38 per cent). Meanwhile interdependent copyright industries contributed the largest share to imports (81 per cent).

**Table 5-1: Contribution of copyright industries to the national economy of Botswana (2016)**

Copyright sector	GDP (million Pula)	Employment	Exports (million Pula)	Imports (million Pula)
Core	4,355.47 (47)	12,029 (65)	130.12 (10)	335.37 (10)
Interdependent	2,918.69 (31)	1,138 (6)	182.37 (13)	2,680.24 (81)
Partial	510.15 (6)	1,561 (9)	519.18 (39)	245.73 (7)
Non-dedicated	1,525.46 (16)	3,679 (20)	500.30 (38)	59.45 (2)
Total copyright industries	9,309.77	18,407	1,331.98	3,320.78
BW Economy	170,588.89	690,901	103,960.90	95,831.76

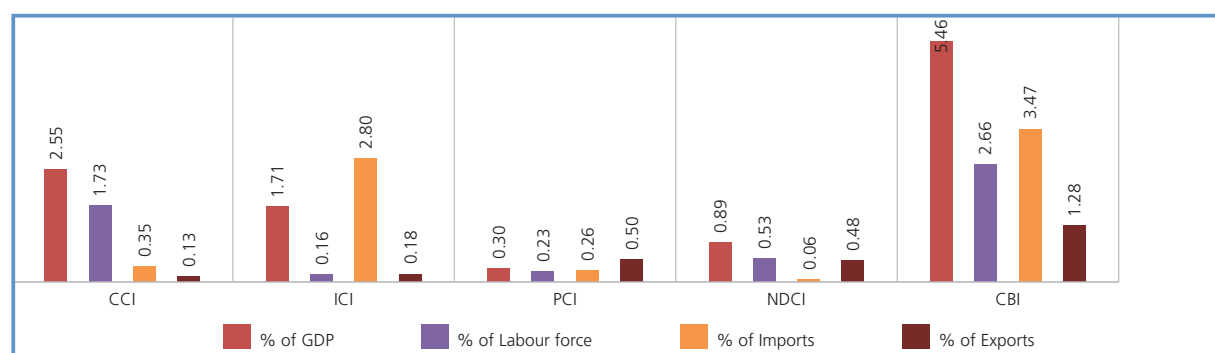
NB: Figures in parentheses are percentages

Figure 5-1 shows the share of each sub-sector of the copyright industries in their total contribution of 5.46 per cent to the GDP of Botswana in 2016. As shown in the figure, the largest share (2.55 per cent, which represents 47 per cent of the 5.46 per cent) comes from CCI. The shares attributed to interdependent copyright industries (ICI), partial copyright industries (PCI), and non-dedicated support industries (NDSI) are lower at 1.71 per cent (31 per cent of 5.46 per cent), 0.30 per cent (6 per cent of 5.46 per cent) and 0.89 per cent (16 per cent of 5.46 per cent) respectively.

Similarly, CCI contributed the largest share of 1.74 per cent (65 per cent of 2.66 per cent) to employment, followed by PCI at 0.17 per cent (6 per cent of 2.66 per cent), NDSI at 0.23 per cent (9 per cent of 2.66 per cent), and ICI at 0.53 per cent (20 per cent of the 2.66 per cent).

In terms of foreign trade, copyright industries contributed 3.47 per cent to national imports. ICI contributed the largest share (2.8 per cent or 81 per cent of the 3.47 per cent) to imports, followed by CCI (0.35 per cent or 10 per cent of 3.47 per cent), PCI (0.26 per cent or 8 per cent of 3.47 per cent), and NDSI (0.06 per cent or 2 per cent of 3.47 per cent). PCI contributed the largest share (0.5 per cent or 39 per cent of 1.28 per cent) to exports followed by NDSI (0.48 per cent or 38 per cent of 1.28 per cent), ICI (0.18 per cent or 14 per cent of 1.28 per cent), and CCI (0.13 per cent or 10 per cent of 1.28 per cent).

**Figure 5-1: Share of copyright industries in the national economy of Botswana (2016)**



## 5.1 Contribution of Copyright Industries to GDP

Table 5-2 shows the contribution of the different sub-sectors of the copyright industry to the GVA and GDP of Botswana. The absolute GVA and GDP are expressed in millions of Pula, whereas the GVA and GDP shares are expressed in percentages. Total GVA in Botswana was 155,138 million Pula while GDP was 170,588.89 million Pula. The total contribution of all the four copyright industry sub-sectors in 2016 was 9,303.77 million Pula, representing a contribution of 5.99 per cent and 5.46 per cent to GVA and GDP respectively as shown in Table 5-2.

**Table 5-2: Contribution of copyright industries to GVA and GDP for 2016 (in million Pula)**

Copyright sector	Value added	Percentage contribution to GVA	Percentage contribution to GDP
Core copyright industries	4,355.47	2.80	2.55
Interdependent copyright industries	2,918.69	1.88	1.71
Partial copyright Industries	510.15	0.33	0.30
Non-dedicated support industries	1,525.46	0.98	0.89
Copyright value added	9,309.77	5.99	5.46
Botswana GVA	155,438.00		
Botswana GDP	170,588.89		

### 5.1.1 Core copyright industries

Core copyright industries (CCI) contributed a total of 4,355.47 million Pula in 2016 or 2.55 per cent of GDP. Table 5-3 shows the contribution of CCI per sub-sector. It shows that there is a variation among the CCI sub-sectors in terms of their contribution to GDP. Music, theatrical productions and operas contributed the largest share (28.19 per cent or 1,227.8 million Pula) of CCI contribution to GDP, followed by press and literature (1,022.2 million Pula or 23.47 per cent). Radio and television contributed 739.5 million Pula or 16.98 per cent of the contribution of CCI to GDP. The visual and graphic arts and copyright collecting society generated the smallest share (128.8 million Pula or 2.96 per cent and 117.2 million Pula or 2.69 per cent respectively) of CCI contribution to GDP.

**Table 5-3: Value added of core copyright industries sub-sector (2016)**

Core sub-sectors	Value added (million Pula)	Percentage
Press and literature	1,022.20	23.47
Music, theatrical productions, operas	1,227.80	28.19
Motion picture and video	353.00	8.10
Radio and television	739.50	16.98
Photography	239.70	5.50
Software and databases	287.70	6.61
Visual and graphic arts	128.80	2.96
Advertising services	239.60	5.50
Copyright collecting societies <sup>6</sup>	117.20	2.69
<b>Total</b>	<b>4,355.47</b>	<b>100.00</b>

### 5.1.2 Interdependent copyright industries

Table 5-4 shows the contribution of interdependent copyright industry (ICI) sub-sectors to GDP. As indicated in the table, the paper sub-sector accounts for a significant share of GDP (27.67 per cent). Blank media contributes 588.5 million Pula or 20.16 per cent to the ICI share. The third largest share is attributed to photographic and cinematographic equipment at BWP 489.9 million Pula or 16.79 per cent of ICI contribution to GDP. The computer and equipment sub-sector contributes the least at 8.36 per cent.

It is not surprising that the computer and equipment sub-sector contribution is low as very few local enterprises in Botswana are engaged in the manufacturing of equipment required for the creation, production or use of copyrighted material. It is important to note that even though music, theater and opera contribute a significant share to core copyright industries as shown above, the manufacturing of musical instruments generates a very small share. There is heavy dependence on imports of equipment, musical instruments, photographic and recording material. However, retail trade in these materials contributes significantly to the economic activity in the ICI sub-sector. The heavy dependence on imports of equipment, musical instruments and photography and recording material represents an opportunity to develop the manufacturing sector in Botswana.

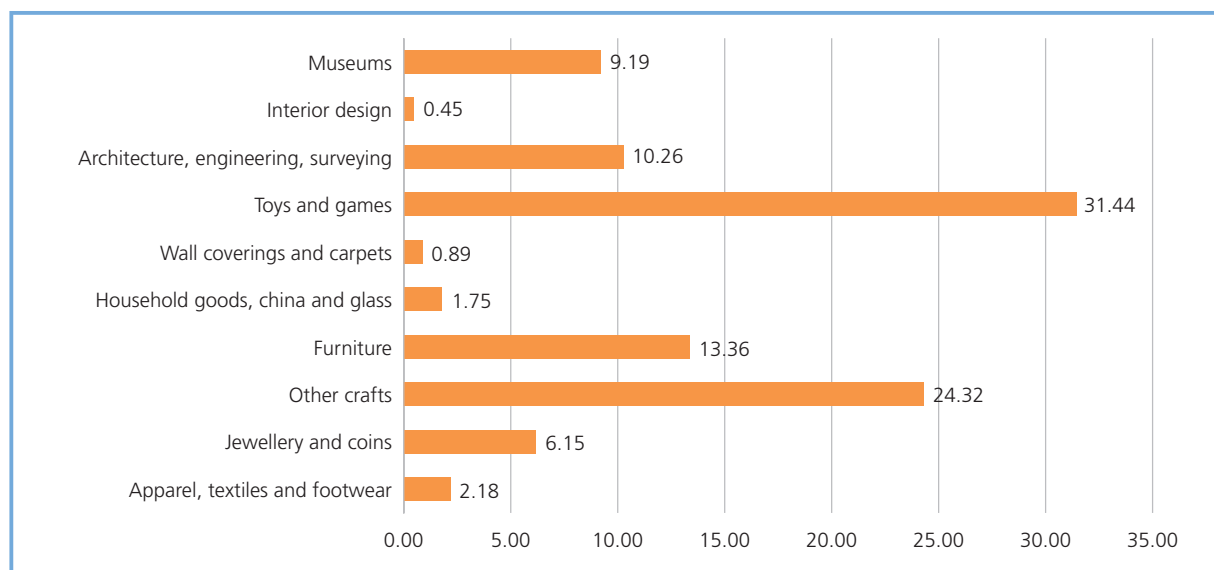
**Table 5-4: Value added of interdependent copyright industries (2016)**

Sub-sector	Value added (millions BWP)	Per cent
Manufacture, wholesale and retail	363.70	12.46
Computer and equipment	244.10	8.36
Musical instruments	351.00	12.03
Photographic and cinematographic instruments	489.90	16.79
Photocopiers	73.80	2.53
Blank recoding materials	588.50	20.16
Paper	807.70	27.67
<b>Total</b>	<b>2918.70</b>	<b>100.00</b>

### 5.1.3 Partial copyright industries

In the partial copyright industries (PCI), only a portion of the activities relates to copyrighted works and related subject matter. Hence, it is necessary to include only the portion attributable to copyright works. This is done by adjusting the values of copyright factors calculated in Chapter 4. The value added of the PCI in 2016, after application of the copyright factor stood at 510.15 million Pula. Figure 5-2 shows that toys and games accounted for the largest share in this category at 31.44 per cent. Interior design contributed the least to PCI at 0.45 per cent or 2.32 million Pula.

<sup>6</sup>The economic activities under the copyright collecting societies are defined as activities of professional membership organizations (including associations of specialists engaged in cultural activities) and hence includes activities beyond those undertaken by COSBOTS.

**Figure 5-2: Value added of partial copyright industries for 2016 (percent)**

#### 5.1.4 Non-dedicated support industries

The activities in these industries are shared between copyright industries and other sectors of the economy. Just like for partial copyright industries, only a portion of the activities in these industries is considered when estimating their economic contribution. Hence, the values of the various activities in these industries are reduced by the copyright factor to single out the proportion attributable to copyright. These industries include general wholesale and retail, general transportation and telecommunication.

General wholesale and retail contributed the largest share to GDP for non-dedicated support industries in 2016 (890.30 million Pula or 58.36 per cent), followed by general transportation (565.77 million Pula or 37.09 per cent), whereas telecommunications and the internet contributed the least (69.39 million Pula or 4.55 per cent).

**Table 5-5: Value added of non-dedicated support industries (2016)**

Sub-sector	Value added (million Pula)	Percentage
General wholesale and retailing	890.30	58.36
General transportation	565.77	37.09
Telephony and internet	69.39	4.55
<b>Total</b>	<b>1,525.46</b>	<b>100</b>

## 5.2 Contribution of Copyright Industries to Employment

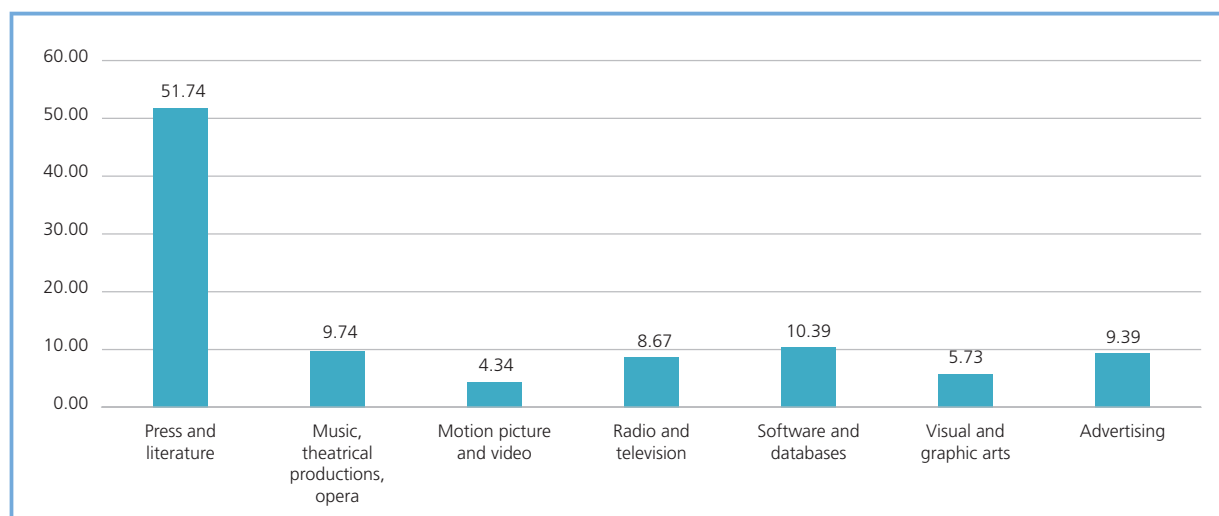
The contribution of copyright industries to employment was estimated using the 2015/16 Botswana Multi-Topic Household Survey (BMTHS), which covered all urban and rural areas in the country. According to the survey, the total workforce (15 years and above) for Botswana was 690,901 in 2016. Copyright industries employed 18,407 people in 2016 or 2.66 per cent of the total workforce. Core copyright industries contributed the highest share to employment in copyright industries with 12,029 people employed in the sector (1.74 per cent of total employment or 65 per cent of employment in copyright industries). The second largest contributor to employment in copyright industries was non-dedicated industries, employing 3,679 people (0.53 per cent of total employment or 20 per cent of employment in the copyright industries). Interdependent and partial copyright industries had the lowest contributions of 1,138 employees (0.16 per cent of total

employment or 6 per cent of employment in the copyright industries) and 1,561 employees (0.23 per cent of total employment or 9 per cent of employment in the copyright industries) respectively.

### 5.2.1 Core copyright industries

Figure 5-3 presents the contribution of core copyright industries to employment. Press and literature contributes the largest share (51.7 per cent), while motion picture and video are the lowest contributor (4.3 per cent). The other sub-categories contributed to employment as follows: software and database (1,249 employees); music, theater and opera (1,172); radio and television (1,043); advertising (1,130); and visual and graphic arts (689).

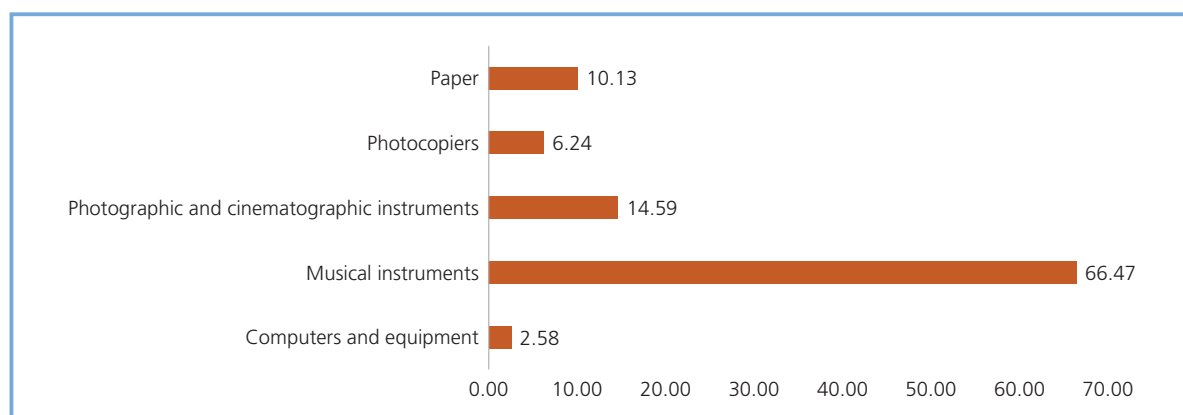
**Figure 5-3: Employment in the core copyright industries by sub-sector for 2016 (percent)**



### 5.2.2 Interdependent copyright industries

Interdependent copyright industries contribute the least to employment in copyright industries (1,138 or 6 per cent). The highest-ranking sub-sector under interdependent industries is the manufacturing of music instruments which contributes 66.5 per cent to employment (756 employees), as indicated in Figure 5-4.

**Figure 5-4: Employment in the interdependent industries per sub-sector for 2016 (percent)**



### 5.2.3 Partial copyright industries

The total contribution of partial copyright industries to the national labor force is 1,561 employees (9 per cent) as shown in Table 5-6. The highest contributor to employment in the sub-sector is furniture (36.6 per cent or 566 employees), followed by other crafts and toys (25.4 per cent) and games (11.9 per cent). All other activities account for less than 10 per cent of the sub-sector's contribution to employment. Museums contributed 8.9 per cent, while wallcoverings and carpets contributed the least (0.4 per cent) to employment



in the partial copyright industries. It is important to note here that in 2016 Botswana had no enterprises manufacturing wallcoverings and carpets; the enterprises recorded under this sub-sector were in retailers.

**Table 5-6: Employment in partial copyright industries per sub-sector (2016)**

Sub-sector	Number of Employees	Percentage
Apparel, textiles, and footwear	43	2.7
Jewelry and coins	70	4.5
Other crafts	397	25.4
Furniture	566	36.3
Household goods, china and glass;	64	4.1
Wallcoverings and carpets	6	0.4
Toys and games	186	11.9
Architecture, engineering, surveying interior design	91	5.8
Museums	139	8.9
<b>Total</b>	<b>1,561</b>	<b>100</b>

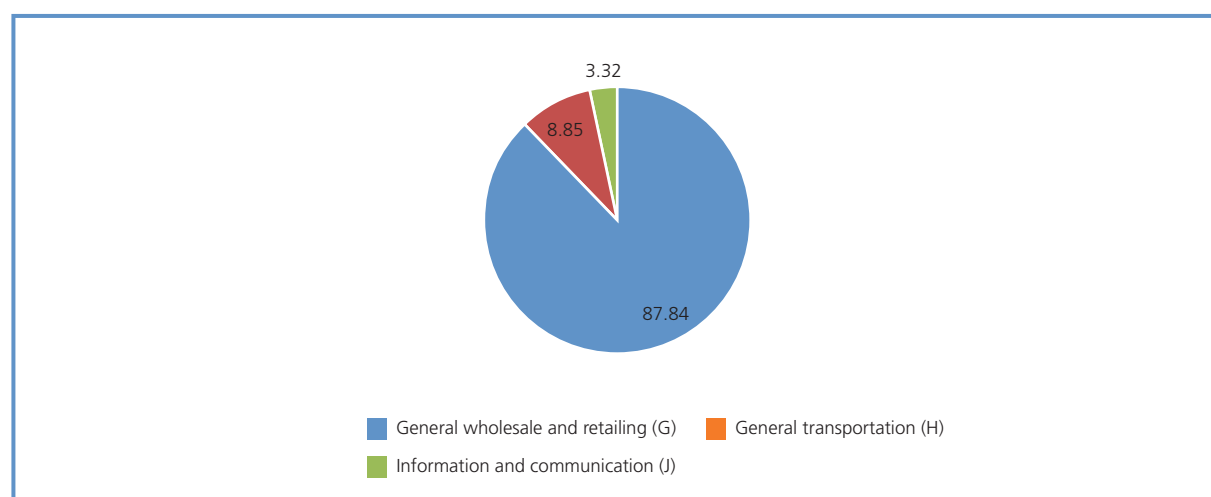
#### 5.2.4 Non-dedicated support industries

Within the non-dedicated support industries sub-sector, wholesale and retail, which are highly labor-intensive activities, contributed the highest share of employment with 3,232 employees or 87.8 per cent of total sub-sector employment. The remaining share is divided between general transportation (8.8 per cent, or 325 employees) and information and communication (3.3 per cent or 122 employees) as shown in Table 5-7 and Figure 5-5.

**Table 5-7: Employment in non-dedicated support industries per sub-sector (2016)**

Sub-sector	Number of Employees	Percentage
General wholesale and retailing	3,232	87.8
General transportation	325	8.8
Information and communication	122	3.3
<b>Total</b>	<b>3,679</b>	<b>100</b>

**Figure 5-5: Employment in non-dedicated support industries per sub-sector in 2016 (percent)**





### 5.3 Contribution of Copyright Industries to Foreign Trade

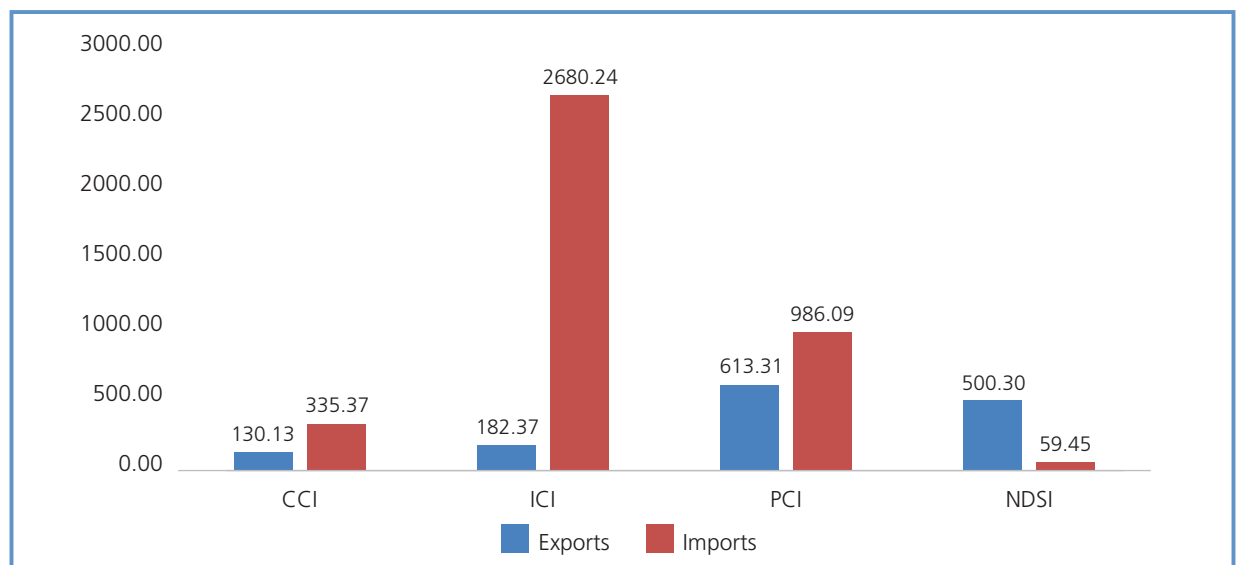
Table 5-10 shows the contribution of various copyright industry sub-sectors to national exports and imports. Total exports and imports are expressed in million Pula, whereas the shares are expressed in percentages. Total exports in Botswana were 103,960.90 million Pula, while total imports were 95,831 million Pula in 2016, yielding a positive net trade balance of 8,129.14 million Pula. Despite the positive net trade balance at the national level, copyright industries recorded a negative net trade balance of 1,988.80 million Pula in 2016, indicating that Botswana is a net importer of copyrighted goods and services.

**Table 5-8: Contribution of copyright industries to exports and imports for 2016 (in million Pula)**

Categories	Exports	Imports	Trade balance	Percentage of exports	Percentage of imports
Core copyright industries	130.12	335.37	-205.25	0.13	0.35
Interdependent copyright industries	182.37	2,680.24	-2497.87	0.18	2.80
Partial copyright industries	519.18	245.73	273.45	0.50	0.26
Non-dedicated support industries	500.30	59.45	-440.85	0.48	0.06
<b>Total copyright industries</b>	<b>1,331.98</b>	<b>3,320.79</b>		<b>1.28</b>	<b>3.47</b>
<b>Total exports</b>	<b>103,960.90</b>				
<b>Total imports</b>		<b>95,831.76</b>			

Figure 5-7 shows that partial copyright industries made a significant contribution of 0.50 per cent or 519.18 million Pula to national exports. Interdependent industries contributed a larger share of 2.80 per cent or 2,680.24 million Pula. All categories of copyright industries recorded a negative trade balance, except for non-dedicated support industries, which recorded a positive trade balance of 273.45 million Pula. Hence, Botswana is a net importer of copyrighted goods and services.

**Figure 5-6: Contribution of copyright industries to exports and imports for 2016 (million Pula)**



#### 5.3.1 Core copyright industries

Core copyright industries contributed a total of 130.13 million Pula to exports and 335.37 million Pula to imports in 2016. Software, databases and computer games contributed the largest share to core copyright industries' exports (65.31 per cent or 84.99 million Pula), followed by press and literature (18.58 per cent or 24.18 million Pula). Music, theatrical production and operas contributed the third largest share to exports in the core industries (19.5 million Pula or 31.60 per cent). Press and literature contributed the largest share to imports (220.05 million Pula or 65.61 per cent), followed by software, database and computer games

(63.2 million Pula or 18.84 per cent). All sub-sectors of the core copyright industries, excluding software and games, recorded a negative or zero trade balance as shown in Table 5-11.

**Table 5-9: Core copyright industries sub-sector trade, (2016)**

Sub-sector	Exports (million Pula)	Imports (million Pula)	Trade Balance (million Pula)	Percentage of exports	Percentage of imports
Press and literature	24.18	220.05	-195.87	18.58	65.61
Music, theatrical production, operas	19.45	31.6	-12.15	14.94	9.42
Motion picture and video production	0.81	3.96	-3.15	0.62	1.18
Radio and television	0.05	1.26	-1.21	0.04	0.38
Photography	0.00	0.19	-0.19	0.00	0.06
Software, database and computer games	84.99	63.2	21.79	65.31	18.84
Visual and graphic arts	0.66	1.86	-1.20	0.51	0.55
Advertising	0.00	13.26	-13.26	0.00	3.95
Copyright collecting societies	0.00	0.00	0.00	0.00	0.00
<b>Total</b>	<b>130.13</b>	<b>335.37</b>		<b>100</b>	<b>100</b>

### 5.3.2 Interdependent copyright industries

In the interdependent copyright industries, exports are dominated by paper (41.63 per cent) as shown in Table 5-12. TV sets, radios, VCR, CD players and other equipment are the second largest contributors to the exports of interdependent copyright industries (32.68 per cent). However, it is important to note that there are no manufacturers of said equipment in the country; hence, all the exported equipment was in transit or re-traded to other countries. Imports of TV sets, radios, VCR, CD players and other equipment used in copyright industries constitute the largest share of interdependent imports (44.07 per cent), while paper imports were second largest (21.5 per cent).

**Table 5-10: Interdependent copyright industries sub-sector trade (2016)**

Sub-sector	Exports (million Pula)	Imports (million Pula)	Trade balance	Percentage of exports	Percentage of imports
Paper	75.93	576.33	-500.4	41.63	21.5
TV sets, radios, VCRs, CD players	59.6	1,181.08	-1,121.5	32.68	44.07
Computers and equipment	37.12	598.28	-561.16	20.35	22.32
Photocopiers	5.48	160.67	-155.19	3.01	5.99
Photographic and cinematographic instruments	4	143.33	-139.33	2.19	5.35
Blank recording material	0.25	9.55	-9.30	0.13	0.36
Musical instruments	0	11	-0.11	0	0.41
<b>Total</b>	<b>182.37</b>	<b>2,680.24</b>			

### 5.3.3 Partial copyright industries

Jewelry and coins contributed the largest share of partial copyright industry exports in 2016 (500.30 million Pula, or 81.57 per cent). As discussed in Chapter 3, Botswana is a diamond-exporting country; hence, jewelry is expected to contribute a large share to exports. Trade in jewelry is one of the two areas (the other one being software, data and computer games) that have recorded a positive trade balance. The second largest contributor is furniture (2.78 per cent), followed by household goods, china and glass (0.36 per cent) and apparel, textiles and footwear (0.19 per cent). In terms of imports, furniture contributes the largest share (57.41 per cent), followed by jewelry and coins (24.19 per cent) and household goods, china and glass (9.39 per cent). Some activities such as design, museums and other crafts were not traded in 2016.

**Table 5-11: Partial copyright industries sub-sector trade for 2016 (million Pula)**

Sub-sector	Exports	Imports	Trade balance	Percentage of exports	Percentage of imports
Jewelry and coins	500.30	59.45	440.85	81.57	24.19
Apparel, textiles, and footwear	0.97	7.64	-6.67	0.19	3.11
Furniture	14.42	141.07	-126.65	2.78	57.41
Household goods, china and glass	1.87	23.07	-21.20	0.36	9.39
Toys and games	0.97	11.03	-10.06	0.19	4.49
Wallcoverings and carpets	0.39	3.16	-2.77	0.08	1.29
Architecture, engineering, surveying Interior design	0.25	0.30	-0.05	0.05	0.12
Other crafts	0.00	0.01	-0.01	0.00	0.00
Design	0.00	0.00	0.00	0.00	0.00
Museums	0.00	0.00	0.00	0.00	0.00
<b>Total</b>	<b>519.18</b>	<b>245.73</b>			

#### 5.3.4 Non-dedicated support industries

General wholesale and retail is a non-tradable activity, as it recorded zero trade values. General transportation as well as information and communication accounted for approximately equal shares of exports in the non-dedicated support industries. On the other hand, imports of general transportation dominated with about 94.80 per cent while, information and communication recorded only 5.20 per cent share of imports.

**Table 5-12: Non-dedicated support industries sub-sector trade for 2016 (million Pula)**

Sub-sector	Exports	Imports	Trade balance	Percentage of exports	Percentage of imports
General wholesale and retailing	0.00	0.00	0.00	0.00	0.00
General transportation	0.64	12.87	-12.23	50.16	94.80
Information and communication	0.64	0.71	-0.07	49.84	5.20
<b>Non-dedicated support industries</b>	<b>1.28</b>	<b>13.58</b>			

## 5.4 Summary

Copyright industries contribute significantly to GDP (5.46 per cent), with core industries being the main contributors, followed by interdependent, partial and non-dedicated support industries. Meanwhile, they contributed 2.66 per cent to national employment, but recorded a negative trade balance as imports exceed exports. Given the significant contribution of copyright industries to the national economy of Botswana, especially in GDP terms, they ought to be factored into national development planning as one of the avenues toward economic growth and diversification. Furthermore, if these industries are promoted and supported, they could contribute positively to the Government's objective of poverty reduction through inclusive growth. These industries have the potential to create more jobs and hence reduce the high unemployment rate in the country. Their negative contribution to foreign trade calls for measures to enhance the local production of goods and services in the sector and thus ensure import substitution. Moreover, this would improve the trade balance and create more jobs.

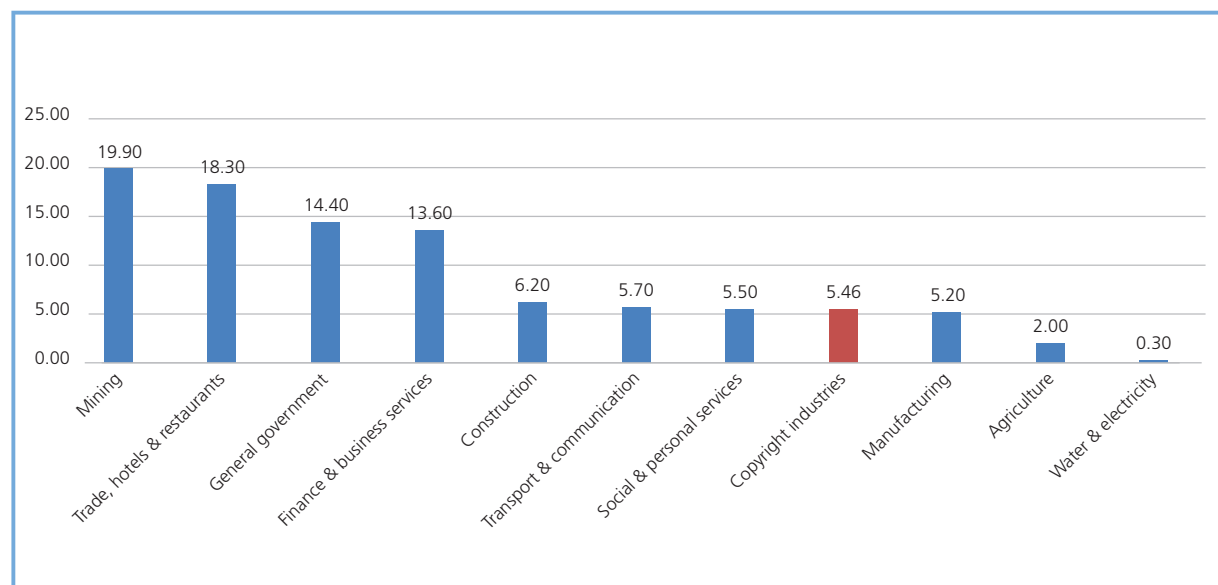
## 6. COMPARISON OF THE CONTRIBUTION OF COPYRIGHT INDUSTRIES WITH THAT OF OTHER SECTORS OF THE ECONOMY

In addition to assessment of the contribution of copyright industries in Botswana, a comparative analysis of these industries and other economic activities was conducted focusing on GDP, employment and foreign trade. This comparison gives a clear picture of the contribution of copyright industries relative to other sectors.

### 6.1 Value added: comparison of the contribution of copyright industries with that of other sectors

A comparison of copyright industries with other sectors of the economy reveals that these industries made the eighth largest contribution to GDP in 2016 at 5.46 per cent (Figure 6-1), surpassing manufacturing (5.2 per cent), agriculture (2.0 per cent), and water and electricity (0.3 per cent). Their contribution also exceeds that of the travel and tourism sector estimated at 3.9 per cent (World Travel and Tourism Council, 2017). The tourism sector has received considerable attention as one avenue through which the economy could grow and diversify. This shows that copyright industries are crucial to the national economy in terms of their contribution to GDP. Hence, concerted efforts should be made to develop them.

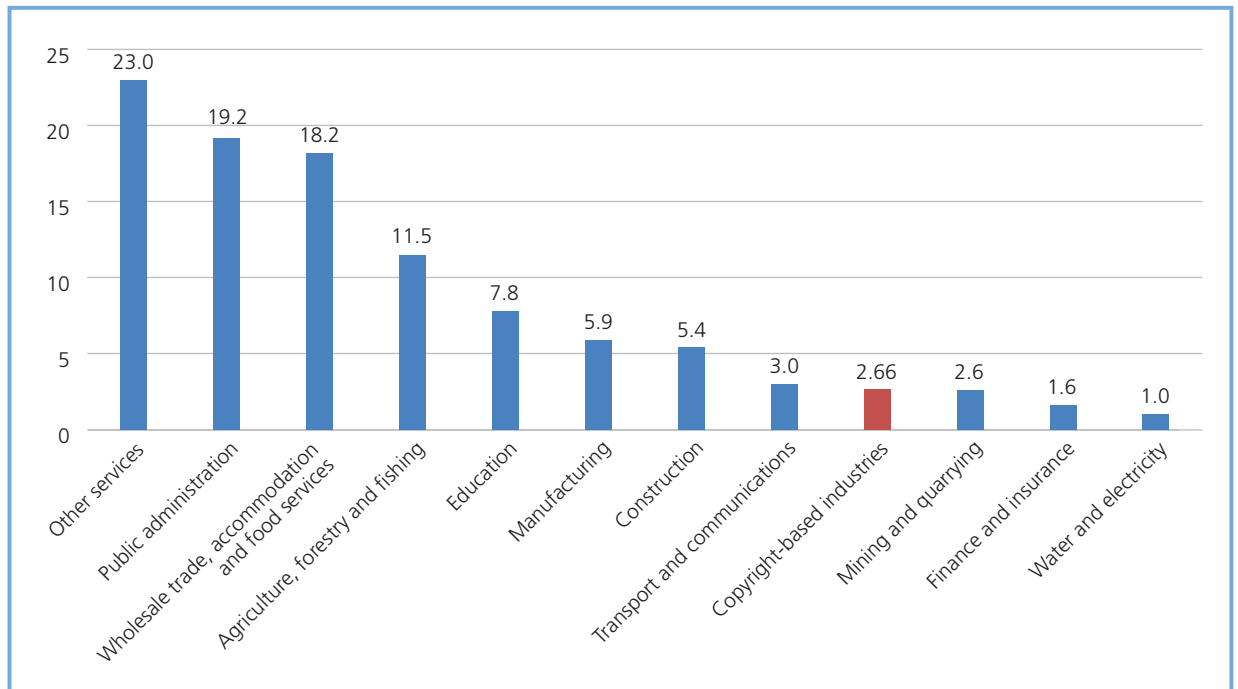
**Figure 6-1: Sector contribution to GDP**



Source: Computed from BoB (2017)

### 6.2 Employment: comparison of the contribution of copyright industries with that of other sectors

This section compares copyright industries' contribution to employment with that of other sectors of the economy. Figure 6-2 shows that the highest contributions to employment were recorded in other services (23 per cent); public administration (19.2 per cent); wholesale trade, accommodation and food services (18.2 per cent); agriculture, forestry and fishing (11.5 per cent); education (7.8 per cent); manufacturing (5.9 per cent); construction (5.4 per cent); and transport and communication (3 per cent). Meanwhile, copyright industries contributed 2.66 per cent, out-performing mining and quarrying (2.6 per cent), finance and insurance (1.6 per cent), and water and electricity (1 per cent). This shows that the copyright industries also play a key role in the national economy in terms of contribution to employment.

**Figure 6-2: Sector contribution to employment**

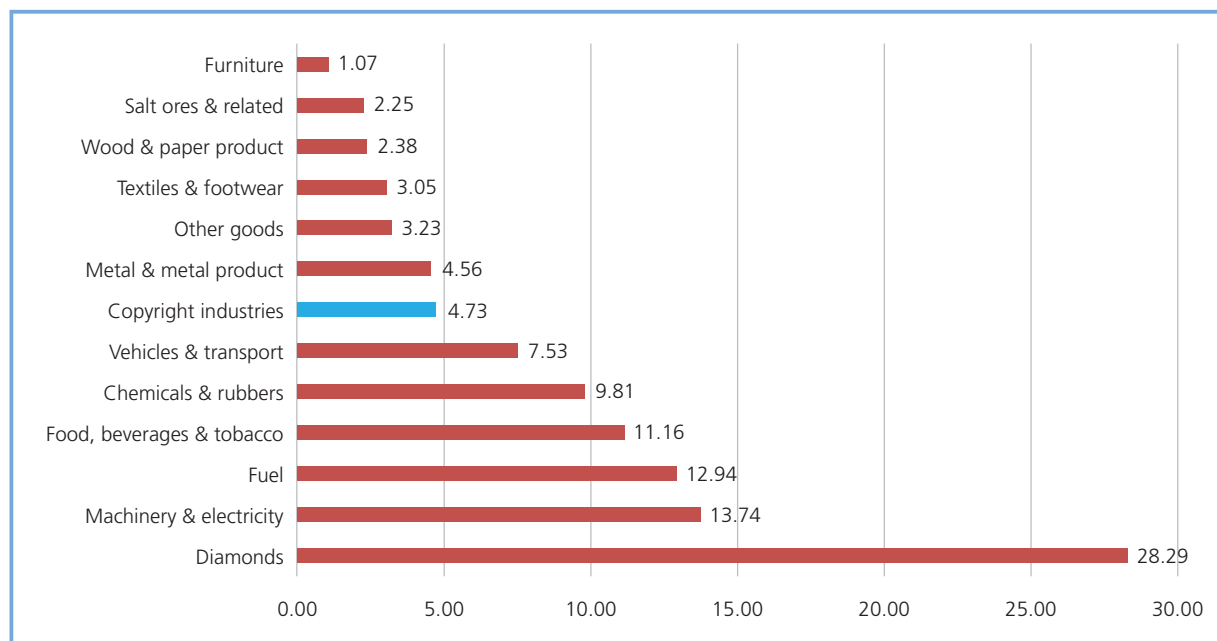
Source: Computed from Statistics Botswana (2017d)

### 6.3 Foreign trade: comparison of copyright industries' contribution with that of other sectors

Total foreign trade comprises all trade in goods and services. In the absence of disaggregated data for trade in services, the study only focuses on comparing goods trade in copyright industries to that of other sectors of the economy. As shown in Figure 6-3, copyright industries contributed 4.73 per cent of the total imports (merchandise), surpassing metal and metal products (4.56 per cent), other goods (3.23 per cent), textiles and footwear (3.05 per cent), wood and paper products (2.38 per cent), salt ores and related products (2.25 per cent) and furniture (1.07 per cent).



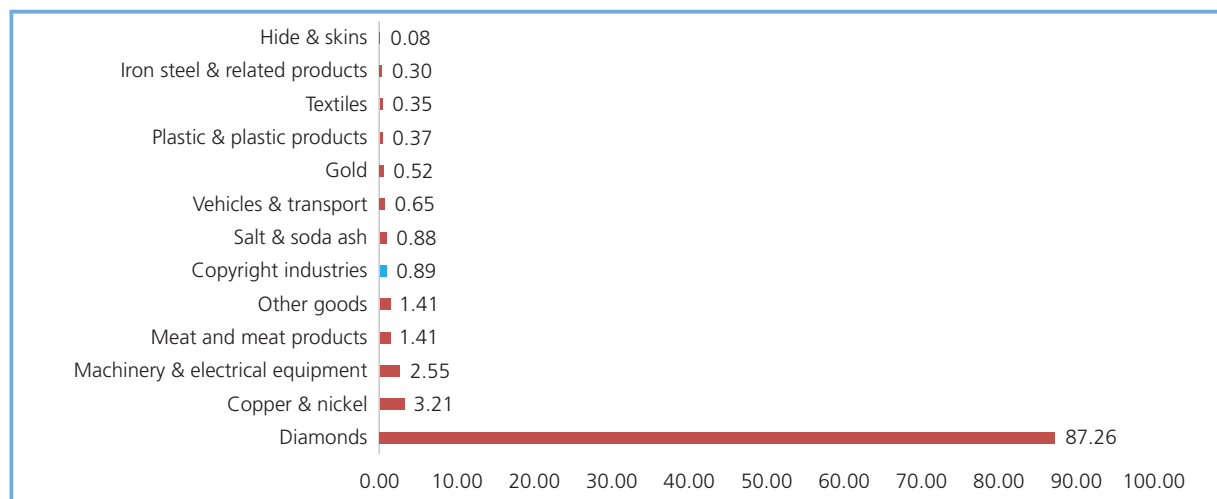
**Figure 6-3: Breakdown of Botswana’s main imports**



Source: Computed from Statistics Botswana (2017c)

The major export commodity is diamonds which account for 87.26 per cent of national exports relative to 0.89 per cent for copyright industries (Figure 6-4). This suggests that Botswana mainly exports rough diamonds and very few manufactured products such as jewelry.

**Figure 6-4: Breakdown of Botswana’s main exports commodities**



Source: Computed from Statistics Botswana (2017b)

### 6.4 Comparison of the contribution of copyright industries in Botswana with that of other countries

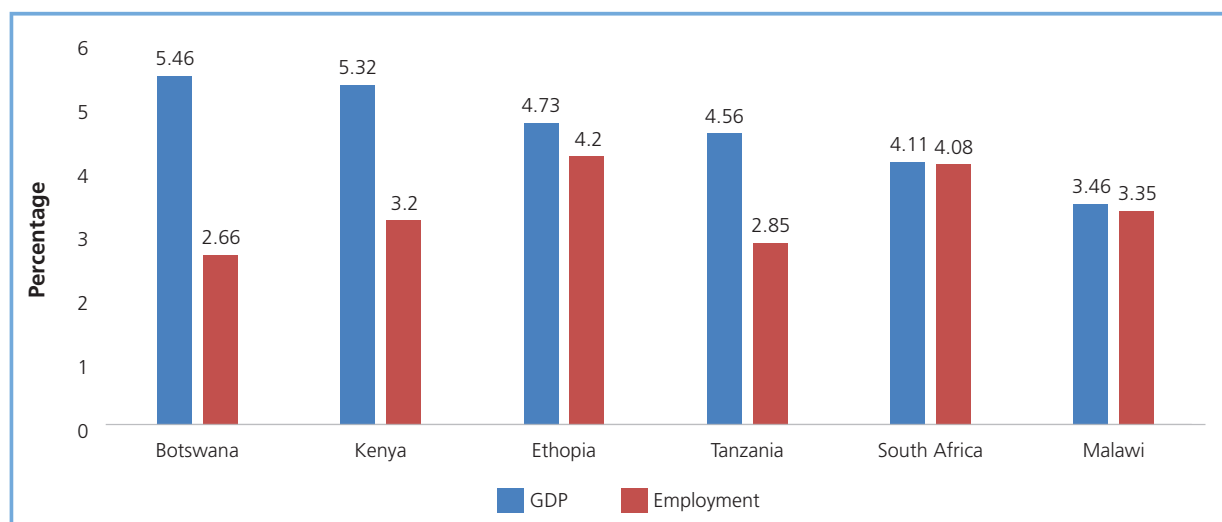
A WIPO analysis of national studies on the economic contribution of copyright industries revealed that their overall performance was significant. In most countries, their contribution was found to be beyond expectations. The analysis covered the findings of surveys in three African countries, namely: Kenya, South Africa and Tanzania. Copyright industries’ contribution to GDP varies significantly across countries, from

11.1 per cent in the USA to 1.58 per cent in Brunei. With an average of 5.26 per cent, three-quarters of the countries contribute 4 per cent to 6.5 per cent. Countries that have experienced rapid economic growth typically have an above average share of copyright industries' contribution to GDP.

The Botswana study found that copyright industries contributed 5.46 per cent to GDP, which is slightly above the range of results obtained in the majority of the countries surveyed. By this measure, Botswana ranks 15th out of the 44 countries that have undertaken similar studies (Annex 2). Indeed, copyright industries' contribution to GDP in Botswana exceeds that of all African countries that have conducted similar studies<sup>7</sup> (Figure 6-5).

However, copyright industries' contribution to employment in Botswana is below the average for countries that have carried out similar studies. It stands at 2.66 per cent, such that Botswana ranks 43rd out of the 44 countries that have carried out the study (Annex 3) and last among all African countries. Hence, Botswana performs well in terms of contribution to GDP but compares poorly with other countries in employment. The plausible reasons for this are the fact that some data was missing on 26 BISIC rev. 4 codes pertaining to employment, and reliance on household surveys instead of industry-specific surveys. These could have led to underestimation of the contribution of copyright industries to employment. However, this mirrors the entire economy, which has a high GDP but low employment owing to the dominance of the mining sector, which is capital-intensive.

**Figure 6-5: Comparison of the contribution of copyright industries in Botswana with that of other African countries**



Source: Computed from WIPO (2014a)

## 6.5 Summary

A comparison of copyright industries' contribution to GDP shows that these industries contribute more than other sectors such as manufacturing, agriculture and water and electricity. Their contribution also surpasses that of the tourism sector. However, some of these sectors, especially manufacturing, agriculture and tourism, have been the focus of government attention to grow and diversify the economy. Since copyright industries contribute more to GDP and job creation than these sectors, it would be logical to promote and develop them.

<sup>7</sup>Ethiopia, Kenya, Malawi, South Africa and Tanzania

## 7. DEVELOPMENT OF SELECTED CORE COPYRIGHT INDUSTRIES IN BOTSWANA

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This chapter discusses the development of selected core copyright industries in Botswana, focusing on press and literature, music, theater, radio and television, visual and graphic arts, and collective management organizations. The chapter also presents the challenges faced by copyright industries as well as potential solutions. It is informed by literature review and focus group discussions with key stakeholders, as indicated in Chapter 4.

### 7.1 Press and literature

The main legislation governing the press and literature sub-sector is the Media Practitioners Act Number 29 of 2008, which created the Media Council,<sup>8</sup> despite the existence of a similar body (Press Council of Botswana) that pioneered self-regulation in the media industry. Members of the Press Council of Botswana are drawn from all print, broadcast and electronic publishers of news and information in the country, while associate membership is open to “organizations with legitimate interests in the democratic development of the local media”. The feeling within the media industry is that the creation of a Media Council to regulate the industry is unnecessary since a structure already exists that promotes self-regulation. In addition to the Press Council of Botswana and the Media Council, there are several organizations operating in the media landscape in Botswana. These include the Media Institute of Southern Africa (MISA),<sup>9</sup> the Botswana Editors Forum (BEF), the Botswana Library Association (BLA) and the Botswana Library Consortium (BLC). The primary mandate of these organizations is to promote the development of the media industry in Botswana, through adherence to media ethics and freedom.

#### 7.1.1 Educational publishing

Educational publishing<sup>10</sup> has existed in Botswana even before independence (1966). Contemporary literary activities in Botswana blossomed in the 1970s, a period during which the Writers’ Workshop was formed at the University of Botswana to organize and share poetry performances with the communities and to organize conferences and workshops on Botswana and African literature. Furthermore, educational publishing succeeded because the government was eager to commission and buy educational materials from publishers to meet curriculum needs in schools. The language factor notwithstanding, the educational material produced in Botswana included science, mathematics and other books that were in demand in neighboring countries such as eSwatini, Lesotho, Namibia and Zimbabwe. Thus, Botswana educational publishers export curriculum materials to neighboring countries.

Various stakeholders have made efforts geared toward development of the sub-sector. These stakeholders include the Bessie Head Heritage Trust, the Gaborone Book Festival Trust, the Publishers Association of Botswana (PAB), and the Writers Association of Botswana (WABO). The publishing industry is driven by the education sector in Botswana and neighboring countries.

#### 7.1.2 Newspapers and magazines

The first newspaper in Botswana was established in 1857 and published articles in Setswana, the national language. However, English language publications have since dominated the publishing industry of Botswana. After independence, Daily News, the government newspaper, dominated the newspaper industry and

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<sup>8</sup>The Media Council has the authority to impose penalties on journalists, including jail time, if it determines that they have violated the standards, including failure to register at the International Freedom of Expression Exchange (IFEX). It was established in 2008 to promote the free, ethical, pluralistic and self-regulating dissemination of news and information. Its role includes encouraging all media practitioners to adhere to media ethics based on its Media Code of Ethics. It also provides for an independent Media Complaints Committee and a Media Appeals Committee.

<sup>9</sup>MISA is an inter-governmental organisation operating in 11 Southern African countries. Its mission is “to achieve media freedom,” while its vision is to create “a Southern Africa where everyone enjoys freedom of expression”.

<sup>10</sup>Publishing that specializes in creating content for the school or curriculum market. Such publishing thrives in Botswana because of the education environment, which regularly requires content to satisfy curriculum needs.

remains the most circulated newspaper to date. Private newspapers were established after 1973, including *Linchwe*, *Mmegi wa Dikgang* and *Puisanyo*, (Rantao, 1996). Today, there is a significant number of private print media houses in the country, with a reasonable degree of diversity and independence (Fombad, 2011). The oldest are *Mmegi wa Dikgang* now popularly known as *Mmegi*, *The Advertiser*, *The Northern Advertiser*, *The Botswana Guardian*, *The Botswana Gazette*, *Midweek Sun*, *The Sunday Standard*, *The Weekend Post*, *The Voice*, *The Monitor*, *The Echo*, *The Global Post* and *The Telegraph*. All these newspapers are published weekly, with the exception of *Mmegi*, which recently started publishing daily on weekdays.

As at March 2018, there were 19 magazines on the national market dominated by the State-owned Kutlwano. They cover broad subject areas including farming, lifestyle, property, environment, business and miscellaneous subject matter. Locally published magazines face stiff competition from South African magazines, which have a wide readership in Botswana. While many entrepreneurs have tried to enter the market, many have not been successful. The survival of the magazines depends on corporate advertising.

Despite the development and progress in press and literature, the sector still faces several challenges, as observed by industry players. They note that some laws and regulations constrain media practitioners, preventing them from executing their full mandate. These laws include the Sedition Act, the Media Practitioners Act and the National Security Act.

Local publishers of press and literature face stiff competition from foreign publishers who dominate the industry. Moreover, distribution channels are not well developed and there are few distribution outlets in the country. In addition, a few authors, especially those involved in self-publishing, have adopted modern distribution methods such as digital technology.

Another challenge facing the sub-sector is the dominance of the English language in the publishing industry. This has been attributed to the lack of a policy promoting the use of local languages. Industry stakeholders also decry the failure to protect local content against imported material, especially educational material whose domestic production could boost the development of the sector. Stakeholders therefore recommend the formulation of a national policy for the promotion of local content as well as a national language policy to promote publishing in local languages.

## 7.2 Music

The traditional or indigenous music of Botswana is distinctive in each ethnic group although it has been shared through interactions over the years. Contemporary traditional music grew rapidly in the early 1990s and peaked in the early 2000s due to sector dependence on indigenous music. At its peak, the traditional instrumental music of Botswana was exported, especially to South Africa. Botswana musicians have been able to compete with continental musicians as demonstrated by the Matsieng Music Group, which won the Kora Music Award in 2003. *Kwaito-kwasa*, *house-kwasa* and *kwasa-kwasa* are some of the most common music styles, which are essentially Tswana rhythms that are heavily influenced by the kwaito (South Africa) and rhumba (Democratic Republic of Congo) genres. Other music styles currently available in the country include R&B, hip hop, gospel, Afro pop and jazz.

The development of the sub-sector has been facilitated by technological advancements especially from the late 2000s. Telecommunications and internet companies continue to add value to the sub-sector. It has now become easier for musicians to reach global audiences through online music services and earn a larger profit. Online services have also opened up opportunities for Botswana musicians to network and collaborate with foreign artists.

Sector development is ensured by several associations<sup>11</sup> tasked with protecting the interests and welfare of musicians and lobbying the government to formulate policies that promote the industry.

In recent years, the Government has made deliberate efforts through the Ministry of Youth Empowerment, Sport and Culture Development (MYSC) to promote local music. These efforts include hiring local musicians to perform at State events pursuant to Presidential Directive CAB 1 (B) 2015: Oversight of the Proposed Budget Provision to Support Local Culture, Arts and Crafts. Although industry stakeholders have welcomed

<sup>11</sup>Botswana Musicians Union (BOMU), Musician Union of Botswana (MUSUBO), the Botswana Folklore Association (BFA), Botswana Choral Music Association (BOCMA), the Botswana Society for Jazz Education.



this initiative as a positive step toward development of the sector, they still feel that there is room for improvement.

Although music has been one of the successful sub-sectors of core copyright industries, it still faces institutional and regulatory challenges. Some of the major challenges raised during focus group discussions with music industry stakeholders include the following:

1. The industry has many associations, which leads to a fragmentation of efforts and the lack of a single voice advocating for music development in the country. Hence, the industry has been lobbying actively for the creation of a National Arts Council tasked with coordinating the development of art in the country. The lack of a national coordinating body has created many problems that undermine sub-sector growth. According to stakeholders, the National Arts Council will be expected to spearhead the formulation of the National Arts Policy that will address the identified challenges and drive the development of the industry.
2. There is no law regulating the music industry in the country. Consequently, the sub-sector is often subject to regulations, which are not directly intended for it. Examples are the Noise and Nuisance Act, Liquor Act of 2003 and Trade Act of 2003.
3. The industry is plagued by poor human capital development, even though there is a dedicated school, namely the Oodi College of Applied Arts and Technology, which is supposed to develop human capital for the sub-sector. According to industry players, the school is not yet operational; as a result, the current curriculum does not focus on development of the arts, particularly music.
4. Lastly, there is a lack of purpose-built facilities such as national performance arenas that drives industry players to rely on limited sports complexes, and privately owned performing arenas.<sup>12</sup>

### 7.3 Theater

Theater development in Botswana dates back to the 1970s when government officials started using drama for development communication purposes (Mda, 1993). For example, the *Laedza Batanani* - Community Awakening, a non-formal education project – used popular theater as a medium for encouraging community participation, raising community awareness, fostering discussion, and promoting collective action (Mda, 1993). The project started what is now known as the Theater for Development (TfD) movement, which spread to countries such as Malawi and Lesotho. In the 1980s, the outbreak of HIV/AIDS in Botswana led to the commissioning of theater groups to perform plays on the epidemic; festivals erupted around the country targeting community members, students and the leadership with messages on the disease. The establishment of the University of Botswana Traveling Theater (UBTT) in 1983 is also a notable milestone in the theater sub-sector. The group has held theater training workshops across the country, thus improving theater literacy and development.

About a decade ago, the MYSC initiated two competitions, namely, the Presidents' Day Competition (PDC) and Constituency Arts Competition (CAC), to promote different genres of art. The PDC starts at the regional level where winners are selected for the national final, while the CAC is organized at the ward and constituency level. These initiatives have fueled theater development in the country.

Several associations operate within the theater and performing arts sub-sector. They include the Botswana Association of Theater Activists (BAOTA), Reetsanang Association of Community Drama Groups, Black African Poets, Association of Botswana Schools Performing Arts (ABOSPA), Comedy for the Nation of Botswana, Botswana Centre for the International Theater Institute (BCITI), Children's Performing Arts Botswana (CHIPABO) and the National Union of Botswana Artists (NUBA).

Theater shares the same challenges with the music industry. These include the lack of a national structure to regulate the arts, leading to stagnation of the sub-sector. Theater sub-sector stakeholders feel that a National Arts Council will be best suited to assist, formalize, commercialize and professionalize the arts industry. Furthermore, it will facilitate the formulation of policies that have a direct impact on the sector.

<sup>12</sup>The Maitisong and Mantlwaneng performing arenas.



Although industry players have noted the positive efforts made by the MYSC through the PDC and CAC, they still feel that the effects of these initiatives will soon plateau as they are organized only once a year. They consider the lack of continuity to be the biggest threat to the sustainability of these initiatives. Hence, there is need to create platforms that enable theater players to display their talent throughout the year.

As in the music industry, human capital development is very low in the theater industry. Industry stakeholders note that between the 1980s and 1990s, theater played a central role in disseminating messages on community issues, particularly HIV/AIDS and sexual violence. To date, the educational curriculum (from primary to secondary school) is negligent of the potential human development that can be effected in society through theater. Industry players have therefore called for the review of school curricula to ensure the holistic inclusion of the arts. This will encourage development of the arts among students at an early age. At the tertiary education level, industry players note that in Botswana, investment in the arts lags behind investments in other disciplines like science, social science and humanities. They suggest that a special fund/initiative should be created to invest in the development of students who excel in the arts.

Given the industry's huge potential for contributing to economic growth, stakeholders call for partnerships between the government, the private sector and non-governmental organizations to invest in the arts industry. Current investments should be diverted to infrastructure and technical support to the industry to address the lack of public specialized theater arenas.

#### 7.4 Visual and graphic arts

The success of visual arts in Botswana stems from the rich background of traditional/indigenous arts and crafts movements. The various communities in Botswana are known for their excellence in the traditional arts such as pottery-making, woodcarving, beadmaking, leather works and *lokgapho* (traditional decorations). Before independence, arts and crafts were produced for personal use, pride and transmission of cultural practices rather than for commercial purposes. However, since independence, the arts have become an income-generating activity, although the articles are often sold below market prices.

Pottery and basketry remain relevant economic activities and master potters have been able to sell their products by collaborating with marketers who distribute them. The Kuru Project in Ghanzi was instrumental in developing the visual arts in Ghanzi district and the community was able to generate financial benefits from local talent. The project unearthed talented artists who represented the country in Africa, Europe and Australia. However, its success has waned in recent years.

The role played by the Department of National Museum and Art Gallery in developing the visual arts in Botswana cannot be overemphasized. The department provided the first professional venue for the exhibition of visual arts in the country and continues to offer the largest forum for exhibitions through various national and community museums. Other associations that continue to play a part in the development of the sector are the Botswana Visual Arts Association (BOVAA), Thapong Visual Arts Centre, and Botswana Society for the Arts.

Unlike other creative arts in Botswana, visual arts have been included in the curriculum at the primary, secondary and tertiary education levels. However, the curriculum remains heavily theoretical with minimal entrepreneurial skills development, such that graduates lack the ability to transform their talents into sustainable enterprises. Hence, there is need for business development training initiatives such as art incubators/hubs to build entrepreneurial skills in the arts.

In recent years, visual artists have complained about the shrinking local market for their products. In a bid to address this problem, the government issued a Presidential Directive on the Purchasing of Arts and Crafts, encouraging government ministries and departments to buy local arts and crafts for their offices. This initiative has improved the market for arts and crafts in the country.

#### 7.5 Radio and television

The radio and television sub-sector in Botswana is regulated by the Botswana Communications Regulatory Authority (BOCRA), which came into existence when the Broadcasting Act and Telecommunications Act

were merged to form the Communication and Regulatory Authority (CRA) Act. The mandate of BOCRA is to promote the growth of the communications sector by protecting both consumers and operators through regulation. However, BOCRA does not regulate public media; i.e., both radio and television stations. It administers the Universal Access and Service Fund and acts as its secretariat. This Fund has its own Board of Trustees and is funded by contributions from the licensees of BOCRA. The authority has successfully completed the Digital Migration Project sanctioned by the Southern African Development Community (SADC), Local Content Guidelines, Hospitality Internet Guidelines and the Licensing Framework for Postal Services. Future projects include the development of a Code of Conduct for Elections and the operation of a Broadcasting Monitoring System.

### 7.5.1 Radio

Radio remains one of the most important mediums of information communication in Botswana. Its resilience since the establishment of the government-owned Radio Botswana has not gone unnoticed. The potency of radio as a mobile medium, its usefulness for public dialogue and entertainment, and its effectiveness as a less sophisticated technology that is easily accessible and adaptable in remote communities has ensured that it remains the most preferred and dominant medium of mass communication in Botswana (Lesitaoka, 2013).

Radio Botswana (RB1) and Radio Botswana 2 (RB2) are State-owned with national coverage and directly compete with privately owned radio stations. According to Mosime (2015), post-colonial African governments view broadcasting as a vehicle for mobilizing support and hence are intent on maintaining control over this medium. Although the landscape is dominated by the State-controlled RB1 and RB2, three private commercial radio stations have been in existence for more than five years.

### 7.5.2 Television and production

Like the radio, the television industry in Botswana is dominated by the State-owned Botswana Television (BTV), the lone public TV station that has been operating for several years. However, a new State-owned channel called NOW TV was launched in early 2018 by MYSC, targeting the youth and cultural sectors. The advent of digital television has broadened the spectrum of TV channels, with BTV launching BTV 2, a commercial State-owned TV station that competes with the private sector. The station is regulated by BOCRA, which ensures that all industry players operate within the same regulatory environment. The national TV market changed dramatically when BTV commissioned local content for the first time in 2015, thus giving local independent producers an opportunity to display their talent as well as a stake in the national economy.

The development of the film and television industry in Botswana has not been the pursuit of government alone; the private sector has and continues to play a major role as well. Private sector participation in the industry has been facilitated by BOCRA through the issuance of licenses to several private television stations. Just a few multinational television companies such as Multichoice Digital Satellite Television (DSTV) from South Africa, the American-based Netflix and Kwese TV, operate in the country.

### 7.5.3 Independent producers

Independent producers are a critical part of the value chain in the television and film industry as they provide much-needed content. They have operated in Botswana long before independence and the advent of television. Filmmaking reached a turning point after World War II when filmmakers focused attention on the environment of Botswana, especially its wildlife species, as well as the lifestyle of the Basarwa. Some of the famous documentaries made on the same subject include *The Hunters*, *The Lost World of Kalahari*, *Lost World*, *Wild Kingdom* and *Sands of the Kalahari* running from the 1950s to 1970s and all by foreign producers. The feature film, *The Gods Must Be Crazy*, was set in Botswana although it was filmed in Northern Transvaal and Namibia between 1980 and 1981. The 1980s and 1990s were characterized by the production of high-quality wildlife films and documentaries by international filmmaking companies especially in the Chobe and Ngamiland districts.

The contemporary film industry in Botswana has striven to follow in the footsteps of early filmmakers by recording and telling Botswana stories. The establishment of the national television service (BTV) gave filmmakers hope for the professional development of the industry. The first known independent production companies to set up offices in Botswana include Dipolelo Productions and Looks Productions. Some of the first Botswana stories told by Botswana filmmakers include *The Story of Sir Seretse and Lady Khama* by Billy

Kokorwe; *Hot Chillie* by Moabi Mogorosi; *Re Bina Mmogo* by George Eustice and *Thokolosi* by Norman Moloi. Two big-budget international feature movies were filmed in Botswana, increasing the appeal of the country's film environment. These are Anthony Minghella's *The No. 1 Ladies Detective Agency* and *A United Kingdom*, a love story of Botswana's founding president with a British woman during the apartheid era in South Africa.

Although there was a breakthrough in independent production in 2016, when Botswana Television (BTV) commissioned local content for the first time, this did not fully benefit the local television industry because of the procurement method used. Currently, the procurement of content is unsustainable as there is no scheduled cycle. Instead of commissioning films, BTV follows the tendering system of the Public Procurement and Asset Disposal Board (PPADB), which is designed for the procurement of goods and services, and is consequently inappropriate. Unlike commissioning, tendering does not take into consideration the rate card, which regulates pricing.

Independent producers have bargaining advantage through the Botswana Film Association (BFA) formed in 2012. It currently has a membership of 30 production houses, including most of the independent producers in the country. The main goal of the association is to organize and regulate the industry and its objectives are to scout for new talent, develop local content and advocate for a proper regulatory framework. It supports government efforts to develop film production in the country. Several milestones have been reached, including the procurement of content by BTV, design of a rate card, awareness-raising campaigns, a film festival and the development of the Local Content Strategy by BOCRA and other stakeholders.

However, the film industry faces challenges, the greatest one being the outdated Cinematograph Act of 1972, which has impeded the development of the industry because it has not been updated to accommodate new developments (especially in technology). The Act has not been adequately implemented as it has been under the custodianship of different ministries. As a result, independent producers were obliged to obtain filming permits from different ministries.

While a film commission has been mooted recently, the industry has been operating without one since the establishment of the Cinematograph Act. This has dealt a blow to the growth of the industry with lack of capacity and investments.

Another challenge facing the film industry is the inability of training institutions to develop curriculum that is tailored to the needs of the industry. The curriculum designed for the industry has been found to be too theoretical, forcing independent producers to either train local talent themselves or import foreign talent. However, the introduction of visual and performing arts (VAPA) at the University of Botswana, the operation of AFDA College of Television and Live Performing Arts and selected courses at Limkokwing University of Creative Technology are all expected to help address this problem.

The other challenges facing the industry are the lack of structural frameworks that support industry activities; the absence of a Film Commission to guide the industry; competition with government ministries and departments which tend to produce their own content and the prohibitive cost of professional equipment, which is mainly manufactured outside Botswana.

In a bid to boost film industry development, the relevant stakeholders have recommended the establishment of a Film Commission that will operationalize the professional processes of the industry such as funding and the administrative framework; and the formation of a National Arts Council to regulate the entire creative industry. Moreover, they have suggested that the Government should consider extending procurement beyond the tender system and adopting the rate card system designed by BOFIA.

## 7.6 Collective management organization

COSBOTS is the only collective management organization (CMO) in the country, pursuant to the section 36A of the Copyright and Neighbouring Rights Act, 2008. It represents copyright owners in the various categories

of works protected under copyright law and defines rules and regulations that protect the interests of its members.

Since its formation, COSBOTS has managed music rights, while a reprography department established in July 2016, manages the rights for literary works and visual arts. The mandate of COSBOTS includes collecting royalties or licensing fees from users of works; negotiating and setting tariffs for the use of works; and distributing royalties to rights holders. The society started collecting in 2012 and the first distribution of royalties was done in 2013. However, there has been no international distribution, as COSBOTS has no reciprocal agreements with other sister CMOs.

COSBOTS faces several challenges in the performance of its mandate, some of which stem from the fact that it is under-resourced. This limits its ability to raise awareness through public education campaigns on the issue of piracy and to police the use of rights across the country, given that it has only one office based in Gaborone. Another challenge faced by COSBOTS is the withholding of information by right users; for example, not informing the society about their events in order to avoid paying royalties to right owners.

## 7.7 Summary

The development of core copyright industries predates independence. These industries have developed over time, but face a number of institutional challenges such as the fragmentation of associations, which makes it difficult for them to engage in advocacy with a single voice. This calls for the establishment of a National Arts Council responsible for coordinating arts development in the country. In sectors like music and television, the shortage of training institutions in the country leads to overreliance on foreign training institutions and undermines human capital development in core copyright industries.

Core copyright industries also face regulatory challenges in that some laws and regulations (Sedition Act, Media Practitioners Act and National Security Act) limit practitioners in the fulfillment of their mandate. Other laws such as the Cinematograph Act of 1972 are outdated. In order to develop the industry, laws and regulations need to be reviewed. The sector is also dominated by the English language in the publishing industry. Hence, concerted efforts should be made to promote publishing in local languages.

Other challenges faced by core copyright industries include a scarcity of facilities, such as purpose-built national performance arenas, which forces industry players to use limited sports complexes and privately owned performing arenas. To ensure development of the industries, there is need to construct facilities in which artists can perform. Although there has been increased private sector participation in the radio and television subsector, State-owned stations still dominate the landscape.



## 8. CONCLUSIONS AND POLICY RECOMMENDATIONS

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### 8.1 Conclusions

Although the Government of Botswana has recognized the importance of creative/copyright industries to the economy, their contribution to GDP, employment and foreign trade are not known. Accordingly, this study estimates the contribution of copyright industries to the economy of Botswana in 2016, using the WIPO methodology developed in 2003 and revised in 2015. Such contribution is estimated in terms of GDP, employment and foreign trade.

The results indicate that copyright industries make a significant contribution to the national economy of Botswana. In 2016, they contributed 5.46 per cent to GDP and 2.66 per cent to the total labor force. In foreign trade terms, they contributed 1.28 per cent to national exports and 3.47 per cent to national imports.

In terms of their relative contribution to GDP, copyright industries surpass other key sectors such as: water and electricity (0.3 per cent); agriculture (2 per cent); and manufacturing (5.20 per cent). In fact, copyright industries rank eighth in terms of contribution to GDP in Botswana, contributing more than the travel and tourism sub-sector, which accounted for 3.9 per cent of GDP in 2016. Greater focus has been placed on this sub-sector as one way of growing and diversifying the economy.

Copyright industries contributed more to employment (2.66 per cent) than other key sectors such mining and quarrying (2.6 per cent), finance and insurance (1.6 per cent), and water and electricity (1 per cent).

Copyright industries' contribution to foreign trade is minimal for all sub-sectors, except jewelry and coins. Meanwhile, software, databases and computer games recorded negative trade balances. Overall, these industries recorded a negative trade balance. This means that there are opportunities for import substitution through the development of value chains in the sector, which will lead to the production of more goods and services, thereby increasing employment and reducing the sectoral trade deficit.

Comparison of the copyright industries' contribution in Botswana with that of other countries reveal that the industries perform well especially in terms of GDP. They contributed 5.46 per cent to value added compared to 11.1 per cent in the USA, which is the global highest. In Africa, Botswana's contribution is the highest, followed by that of Kenya at 5.3 per cent. In terms of employment the highest copyright industries' contribution is 11.1 per cent in the Philippines, with the lowest being 1.9 per cent in the Ukraine. Botswana's contribution of 2.66 per cent is the lowest in Africa.

Although copyright industries make a significant contribution to the economy, the sector faces several challenges that inhibit its growth, including the institutional and regulatory framework within which the industries operate and which are discussed below:

1. Several institutions, laws and regulations govern the operations of core copyright industries. However, some of these laws constrain the operations of these industries. For instance, some media industry regulations have been found to be constraining to media practitioners. In some areas, such as radio and television, State-owned structures are dominant. Although there are private radio stations (3) in the country, public radio stations (RB1 and RB2) dominate in terms of coverage and listenership. The same applies to television where the State-owned Botswana Television enjoys broad coverage and viewership. This limits private sector growth in the broadcasting sector.
2. The Copyright and Neighboring Rights Act enacted in 2000 calls for the establishment of a Copyright Arbitration Panel. However, this entity has not yet been set up. In the absence of the arbitration panel, CIPA's Copyright Office assumes this role, thus creating a conflict of interest, as appellants might be appealing against the decisions of CIPA. Alternatively, complainants could opt for protracted proceedings before the law courts, which can be prohibitively costly to some right holders.
3. COSBOTS, the collective management organization, is yet to be fully developed so that it administers all copyrighted works as required by the Act establishing it. Currently, COSBOTS administers the music



industry and is planning to expand its services to other copyrighted works; it has in fact established a new department to manage audiovisual and visual arts rights. However, its capacity is limited as it has only one office in Gaborone and is unable to enforce rights nationwide.

4. One of the findings of this study is that there are several copyright associations in the country, but the majority exist only in name with no functional secretariats.

## 8.2 Recommendations

Based on the study findings, the following are recommended for the development of the copyright industries in Botswana:

1. Concerted efforts should be made to speed up the formation of the National Arts Council, which will oversee the development of the industry;
2. COSBOTS needs to be strengthened in terms of resources so that it can operate nationwide and administer all copyrighted works in the country;
3. Financial and administrative support should be provided to copyright associations so that they become fully functional and be able to influence the government to develop an enabling environment within which their members can flourish;
4. Policymakers should be educated on the contribution of copyright industries to the national economy of Botswana so that they can factor such contribution into the design of sector policies and interventions;
5. The National Policy on Language should be developed to encourage publishing in the national and mother tongue languages;
6. The study on the contribution of copyright industries to the economy of Botswana should be conducted every five years;
7. A National Anti-Piracy Strategy should be developed and fully implemented; and
8. Several legal instruments (Media Practitioners Act, Sedition Act and Cinematograph Act) should be updated to accommodate current developments.

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## Annex 1

### Annex 1a: Comparison of BISIC and WIPO ISIC Classification Revision 3.1

CORE INDUSTRIES	
Press and literature	
Economic Activity	Description (Class) ISIC Rev 3.1
Authors, writers, translators	Class: 9214 – Dramatic arts, music and other arts activities Class: 7499 – Other business activities n.e.c. (for translation and interpretation)
Newspapers	Class: 2212 – Publishing of newspapers, journals, and periodicals
News and feature agencies	Class: 9220 – News agency activities
Magazines and periodicals	Class: 2212 – Publishing of newspapers, journals, and periodicals
Book publishing;	Class: 2211 – Publishing of books, brochures, and other publications
Cards and maps, directories and other published material	Class: 2219 – Other publishing
Pre-press, printing and post-press of books, magazines, newspaper, advertising material	Class: 2221 – Printing Class: 2222 – Service activities related to printing
Wholesale and retail of press and literature (bookstores, newsstands, etc.)	Class: 5139 – Wholesale of other household goods
	Class: 5239 – Other retail sale in specialized stores
Libraries	Class: 9231 – Library and archives activities
Music, theatrical production, operas	
Composers, lyricists, arrangers	Class: 9214 – Dramatic arts, music, and other arts activities
Choreographers, writers	Class: 9219 – Other entertainment activities n.e.c.
Directors, performers and other personnel	Class: 9249 – Other recreational activities
Printing and publishing of music	Class: 2213 – Publishing of music
Production/manufacturing of recorded music	Class: 2230 – Reproduction of recorded media
Wholesale, retail and rentals of recorded music (sale and rental)	Class: 5233 – Retail sale of household appliances, articles and equipment
	Class: 7130 – Renting of personal and household goods n.e.c.
	Class: 5139 – Wholesale of other household goods (incl. wholesale of recorded video tapes)
Artistic and literary creation and interpretation	Class: 9214 – Dramatic arts, music, and other arts activities
Performances and allied agencies (bookings, ticket agencies, etc.)	Class: 9214 – Dramatic arts, music, and other arts activities
Motion picture and video production	
Writers, directors, actors etc.	Class: 9214 – Dramatic arts, music, and other arts activities
Motion picture and video production and distribution	Class: 9211 – Motion picture and video production and distribution
Motion picture exhibition;	Class: 9212 – Motion picture projection
Video rentals and sales, video on demand	Class: 7130 – Renting of personal and household goods n.e.c.
	Class: 9211 – Motion picture and video production and distribution
Allied services	Class: 2230 – Reproduction of recorded media
Radio and television	
Television program production activities	Class: 9213 – Radio and television activities
	Class: 9213 – Radio and television activities
	Class: 7499 – Other business activities n.e.c.
National radio and television broadcasting companies	Class: 6420 – Telecommunications

Independent producers	Class: 7499 – Other business activities n.e.c.
Cable television	Class: 6420 – Telecommunications
Satellite television	Class: 6420 – Telecommunications
Allied services	Class: 9213 – Radio and television activities
<b>Photography</b>	
	Class: 7494 – Photographic activities
	Class: 2222 – Service activities related to printing
Studios and commercial photography	Class: 7499 – Other business activities n.e.c.
	Class: 9231 – Library and archives activities
<b>Software, database and computer games</b>	
Programming, development and design, manufacturing	Class: 7221 – Software publishing
	Class: 7229 – Other software consultancy and supply
Wholesale and retail prepackaged software (business programs, video games, educational programs, etc.)	Class: 5151 – Wholesale of computers, computer peripheral equipment, and Software
Database processing and publishing	Class: 7240 – Database activities and online distribution of electronic content
	Class: 7230 – Data processing
Visual and graphic arts	
Artists	Class: 9214: Activities by authors, music composers, and other independent Artists
Art galleries and other wholesale and retail	Class: 9214 – Dramatic arts, music, and other arts activities
Picture framing and other allied services	Class: 7494 – Photographic activities
Service activities related to printing	Class: 9214 – Dramatic arts, music, and other arts activities
Graphic design	Class: 7499 – Other business activities n.e.c.
<b>Advertising</b>	
Agencies, buying	Class: 7430 – Advertising
Copyright collecting societies	
Copyright Collecting Societies	Class: 9112 – Activities of professional organizations
<b>Interdependent copyright industries</b>	
TV sets, radios, VCRs, CD players, DVD players, cassette players, electronic game equipment, and other similar equipment	Class: 3230 – Manufacture of television and radio receivers, sound or video recording or reproducing apparatus, and associated goods
	Class: 5139 – Wholesale of other household goods
	Class: 5233 – Retail sale of household appliances, articles, and equipment
	Class: 7130 – Renting of personal and household goods n.e.c.
Computers and equipment	Class: 3000 – Manufacture of office, accounting, and computing machinery
	Class: 5151 – Wholesale of computers, computer peripheral equipment, and software
	Class: 7123 – Renting of office machinery and equipment (including computers)
Musical instruments	Class: 3692 – Manufacture of musical instruments
	Class: 5139 – Wholesale of other household goods
	Class: 5233 – Retail sale of household appliances, articles, and equipment
Photographic and cinematographic instruments	Class: 3320 – Manufacture of optical instruments and photographic equipment
	Class: 5139 – Wholesale of other household goods
	Class: 5239 – Other retail sale in specialized stores
	Class: 7129 – Renting of other machinery and equipment n.e.c.



Photocopiers	Class: 3000 – Manufacture of office, accounting, and computing machinery
	Class: 5159 – Wholesale of other machinery, equipment, and supplies
Blank recording material	Class: 2429 – Manufacture of other chemical products n.e.c.
	Class: 5152 – Wholesale of electronic and telecommunications parts and equipment
	Class: 5233 – Retail sale of household appliances, articles, and equipment
Paper	Class: 2101 – Manufacture of pulp, paper, and paperboard
	Class: 5149 – Wholesale of other intermediate products, waste, and scrap
	Class: 5239 – Other retail sale in specialized stores
<b>PARTIAL COPYRIGHT INDUSTRIES</b>	
Apparel, textiles, and footwear	Class: 1810 – Manufacture of wearing apparel
	Class: 1721 – Manufacture of made-up textile articles
	Class: 1920 – Manufacture of footwear
	Class: 5131 – Wholesale of textiles, clothing, and footwear
	Class: 5232 – Retail sale of textiles, clothing, footwear, and leather goods
Other crafts	Class: 9199 – Activities of other membership organizations n.e.c
	Class: 5239 – Other retail sale in specialized stores
Furniture	Class: 3610 – Manufacture of furniture
	Class: 5139 – Wholesale of other household goods
	Class: 7130 – Renting of personal and household goods n.e.c.
Household goods, china and glass;	Class: 2610 – Manufacture of glass and glass products
	Class: 173 – Manufacture of knitted and crocheted fabrics and articles
	Class: 2029 – Manufacture of other products of wood
	Class: 2899 – Manufacture of other fabricated metal products n.e.c
	Class: 5139 – Wholesale of other household goods
Wallcoverings and carpets	Class: 5233 – Retail sale of household appliances, articles, and equipment
	Class: 1722 – Manufacture of carpets and rugs
	Class: 2109 – Manufacture of other articles of paper and paperboard
Toys and games	Class: 5239 – Other retail sale in specialized stores
	Class: 3694 – Manufacture of games and toys
	Class: 5139 – Wholesale of other household goods
Architecture, engineering, surveying, interior design	Class: 7421 – Architectural and engineering activities and related technical consultancy
Design	Class: 7499 – Other business activities n.e.c.
Museums	Class: 9232 – Museums activities and preservation of historical sites and buildings
<b>NON-DEDICATED SUPPORT INDUSTRIES</b>	

General wholesale and retailing (G)	Division: 51 – Wholesale trade and commission trade, except of motor vehicles and motorcycles
	511 – Wholesale on a fee or contract basis
	513 – Wholesale of household goods
	515 – Wholesale of machinery, equipment, and supplies
	519 – Other wholesale
	Division: 52 – Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
	521 – Non-specialized retail trade in stores
	523 – Other retail trade of new goods in specialized stores
	525 – Retail trade not in stores
General transportation (H)	Division: 60 – Land transport; transport via pipelines
	This Division is divided into the following groups:
	Group 601 – Transport via railways group
	602 – Other land transport division:
	61 – Water transport division:
	62 – Air transport
	Class 630 – Supporting and auxiliary transport activities
	6301 – Cargo handling
	6302 – Storage and warehousing
	6303 – Other supporting transport activities
	6304 – Activities of travel agencies and tour operators; tourist assistance activities n.e.c.
	6309 – Activities of other transport agencies
	Group: 641 – Post and courier activities
	This Group is divided into the following Classes:
	6411 – National post activities
6412 – Courier activities other than national post activities	
Information and communication (J)	Class: 6420 – Telecommunications
	Class: 7240 – Database activities and online distribution of electronic content

## Annex 1b: Comparison of BISIC and WIPO ISIC Classification Revision 4

Classification	UN ISIC Rev. 4 Code	BISIC Rev. 4
<b>CORE INDUSTRIES</b>		
<b>Press and literature</b>		
Authors, writers, translators	9000 – Creative, arts, and entertainment activities	9000
	7490 – Other professional, scientific, and technical activities n.e.c. (inc. translation and interpretation activities)	7490
	8299 – Other business support service activities n.e.c. (inc. real-time, i.e. simultaneous, closed captioning of live television performances of meetings, conferences)	8299
Newspapers	5813 – Publishing of newspapers, journals, and periodicals	5813
News and feature agencies	6391 – News agency activities	6391
Magazines and periodicals	5813 – Publishing of newspapers, journals, and periodicals	5813
Book publishing	5811 – Book publishing	5811
Cards and maps, directories and other published material	5812 – Publishing of directories and mailing lists	5812
	5819 – Other publishing activities	5819
Pre-press, printing and post-press of books, magazines, newspaper, advertising material	1811 – Printing	1811
	1812 – Service activities related to printing	1812
	8219 – Photocopying, document preparation, and other specialized office support activities	8219
Wholesale and retail of press and literature (bookstores, newsstands, etc.)	4649 – Wholesale of other household goods (inc. wholesale of stationery, books magazines and newspapers)	4649
	4761 – Retail sale of books, newspapers, and stationery in specialized shops	4761
	7729 – Renting and leasing of other personal and household goods (inc. books, journals and magazines)	7729
Libraries	9101 – Library and archives activities	9101
<b>Music, theatrical production, operas</b>		
Composers, lyricists, arrangers	9000 – Creative, arts, and entertainment activities	9000
Choreographers, writers	9000 – Creative, arts, and entertainment activities	9000
Directors, performers and other personnel	9000 – Creative, arts, and entertainment activities	9000
Printing and publishing of music	5920 – Sound recording and music publishing activities	5920
Production/manufacturing of recorded music	1820 – Reproduction of recorded media	1820
Wholesale, retail and rentals of recorded music (sale and rental)	4649 – Wholesale of other household goods (inc. wholesale of recorded audio, CDs)	4649
	4762 – Retail sale of music and video recordings in stores	4762
	7722 – Renting of video tapes and disks	7722
Artistic and literary creation and interpretation	9000 – Creative, arts, and entertainment activities	900
Performances and allied agencies (bookings, ticket agencies, etc.)	7990 – Other reservation service and related activities (inc. ticket sales, activities for theatrical, sports and other amusement and entertainment events)	7990
	9000 – Creative, arts, and entertainment activities	9000

<b>Motion picture and video production</b>		
Writers, directors, actors etc.;	9000 – Creative, arts, and entertainment activities	9000
Motion picture and video production and distribution	5911 – Motion picture, video, and television program production activities	5911
	5912 – Motion picture, video, and television program post production activities	5912
	5913 – Motion picture, video, and television program distribution activities	5913
Motion picture exhibition	5914 – Motion picture projection activities	5914
Video rentals and sales, video on demand	7722 – Renting of video tapes and discs	7722
	4649 – Wholesale of other household goods (inc. wholesale of DVDs)	4649
	4762 – Retail sale of music and video recordings in specialized shops	4762
Allied services	1820 – Reproduction of recorded media	1820
<b>Radio and television</b>		
Television program production activities	5911 – Motion picture, video, and television program production activities	591
	5912 – Motion picture, video, and television program post production activities	
	5913 – Motion picture, video, and television program distribution activities	
National radio and television broadcasting companies	6010 – Radio broadcasting	6010
	6020 – Television programming and broadcasting activities	6020
Independent producers	5911 – Motion picture, video, and television program production activities	5911
<b>Photography</b>		
Studios and commercial photography	7420 – Photographic activities	7420
<b>Software, database and computer games</b>		
Programming, development and design, manufacturing	5820 – Software publishing	5820
	6201 – Computer programming activities	6201
	6202 – Computer consultancy and computer facilities management activities	6202
	6209 – Other information technology and computer service activities	6209
Wholesale and retail pre-packaged software (business programs, video games, educational programs, etc.)	4651 – Wholesale of computers, computer peripheral equipment, and software (inc. software)	4651
	4741 – Retail sale of computers, peripheral units, software and telecommunications equipment in specialized stores (inc. retail sale of non-customized software, including video games)	4741
Database processing and publishing	6311 – Data processing, hosting, and related activities	631
	6312 – Web portals	
<b>Visual and graphic arts</b>		
Artists	9000 – Creative, arts, and entertainment activities	9000
Art galleries and other wholesale and retail	9000 – Creative, arts, and entertainment activities	9000
Picture framing and other allied services	7420 – Photographic activities	7420
Service activities related to printing	1812 – Service activities related to printing (inc. artistic work)	1812
Graphic design	9000 – Creative, arts and entertainment activities	900
	1812 – Service activities related to printing (inc. artistic work)	1812
	7410 – Specialized design activities (inc. graphic designers)	7410
<b>Advertising</b>		
Agencies, buying	7310 – Advertising	7310
	7320 – Market research and public opinion polling (inc. marketing studies)	7320
<b>Copyright collecting societies</b>		

Copyright collecting societies	9412 – Activities of professional membership organizations (inc. associations of specialists engaged in cultural activities)	9412
<b>Partial Copyright Industries</b>		
Apparel, textiles, and footwear	1410 – Manufacture of wearing apparel	1410
	1392 – Manufacture of made-up textile articles, except apparel	1392
	1520 – Manufacture of footwear	1520
	4641 – Wholesale of textiles, clothing, and footwear	4641
	4751 – Retail sale of textiles in specialized stores	4751
	4771 – Retail sale of clothing, footwear, and leather articles in Specialized stores	4771
	7410 – Specialized design activities	7410
Jewelry and coins	3211 – Manufacture of jewelry and related articles	3211
	3212 – Manufacture of imitation jewelry and related articles	3212
	4649 – Wholesale of other household goods (Inc. jewelry)	4649
	4719 – Other retail sales in non-specialized stores (Inc. jewelry)	4719
	4773 – Other retail sales of new goods in specialized stores (Inc. jewelry)	4773
	7410 – Specialized design activities	7410
Other crafts	9499 – Activities of other membership organizations n.e.c. (inc. craft and collectors clubs)	9499
	4719 – Other retail sales in non-specialized stores (inc. handcrafts)	4719
	4759 – Retail sale of electrical household appliances, furniture	4759
	7410 – Specialized design activities	7410
Furniture	3100 – Manufacture of furniture	3100
	4649 – Wholesale of other household goods (inc. furniture)	4649
	4719 – Other retail sales in non-specialized stores (inc. Furniture)	4719
	4759 – Retail sale of electrical household appliances, furniture	4759
	7410 – Specialized design activities	7410
	7729 – Renting and leasing of other personal and household goods (inc. furniture)	7729
Household goods, china and glass	2310 – Manufacture of glass and glass products	2310
	1391 – Manufacture of knitted and crocheted fabrics	1391
	1430 – Manufacture of knitted and crocheted apparel	1430
	1629 – Manufacture of other products of wood	1629
	2599 – Manufacture of other fabricated metal products n.e.c.	2599
	4649 – Wholesale of other household goods (inc. china and glassware)	4649
	4752 – Retail sale of hardware, paints, and glass in specialized stores	4752
	4759 – Retail sale of electrical household appliances, furniture, lighting equipment, and other household articles in specialized stores)	4759
	7410 – Specialized design activities	7410



Wallcoverings and carpets	1393 – Manufacture of carpets and rugs	1393
	1709 – Manufacture of other articles of paper and paperboard	1709
	4753 – Retail sale of carpets, rugs, wall, and floor coverings in specialised stores	4753
	7410 – Specialized design activities	7410
Toys and games	3240 – Manufacture of games and toys	3240
	4649 – Wholesale of other household goods (inc. toys)	4649
	4719 – Other retail sales in non-specialized stores (inc. toys)	4719
	4764 – Retail sale of games and toys in specialized stores	4764
	7410 – Specialized design activities	7410
Architecture, engineering, surveying Interior design	7110 – Architectural and engineering activities and related technical consultancy	7110
Design	7410 – Specialized design activities (inc. interior decorators).	7410
Museums	9102 – Museums activities and preservation of historical sites and buildings	9102
<b>Interdependent Copyright Industries</b>		
TV sets, radios, VCRs, CD players, DVD players, cassette players, electronic game equipment, and other similar equipment	2630 – Manufacture of communication equipment (inc. radio and TV studio and broadcasting equipment)	2630
Radio and TV equipment	2640 – Manufacture of consumer electronics (inc. TVs, VCRs, DVDs, Hi-Fis, consoles)	2640
	4649 – Wholesale of other household goods (inc. wholesale of consumer electronics)	4649
	4742 – Retail sale of audio and video equipment in specialized stores	4742
	7729 – Renting and leasing of other personal and household goods (inc. relevant electronic equipment for household use)	7729
	7730 – Renting and leasing of other machinery, equipment, and tangible goods (inc. profess. radio and TV equip.)	7730
Computers and equipment	2620 – Manufacture of computers and peripheral equipment	2620
	4651 – Wholesale of computers, computer peripheral equipment, and software (inc. computers and computer equipment)	4651
	4741 – Retail sale of computers, peripheral units, software, and telecommunications equipment in specialized stores (inc. computers)	4741
	7730 – Renting and leasing of other machinery, equipment, and tangible goods (inc. computers and computer peripheral equipment)0	7730
Musical instruments	3220 – Manufacture of musical instruments	3220
	4649 – Wholesale of other household goods (inc. musical instruments)	4649
	4759 – Retail sale of electrical household appliances (inc. musical instruments)	4759
	7729 – Renting and leasing of other personal and household goods (inc. musical instruments, scenery, and costumes)	7729

Photographic and cinematographic instruments	2670 – Manufacture of optical instruments and photographic equipment	2670
	4649 – Wholesale of other household goods (inc. photographic and optical goods)	4649
	4773 – Other retail sales of new goods in specialized stores (inc. photographic, optical and precision equipment)	4773
	7730 – Renting and leasing of other machinery, equipment, and tangible goods (inc. motion picture production equipment)	7730
Photocopiers	2817 – Manufacture of office machinery and equipment (inc. photocopy machines)	2817
	4659 – Wholesale of other machinery and equipment (inc. office machinery and equipment)	4659
Blank Recording Material	2680 – Manufacture of magnetic and optical media	2680
	4652 – Wholesale of electronic and telecommunications equipment and parts (inc. blank material)	4652
Paper	1701 – Manufacture of pulp, paper, and paperboard	1701
	1702 – Manufacture of corrugated paper and paperboard and of containers of paper and paperboard	1702
	1709 – Manufacture of other articles of paper and paperboard	1709
<b>Non-dedicated Support Industries</b>		
General wholesale and retailing (G)	Division: 46 – Wholesale trade and commission trade, except of motor vehicles and motorcycles	461
	This division includes the following classes: 461 – Wholesale on a fee or contract basis 464 – Wholesale of household goods (not prev. inc. in other CIs)	464
	466 – Other specialized wholesale	466
	Division: 47 – Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods	471
	This division includes the following classes: 471 – Retail sale in non-specialized stores (not prev. inc. in other CIs)	474
	474 – Retail sale of information and communications equipment in specialized stores (not prev. inc. in other CIs)	474
	475 – Retail sale of other household equipment in specialized stores (not prev. inc. in other CIs)	475
	477 – Retail sale of other goods in specialized stores (not prev. inc. in other CIs) 476 – Retail sale of cultural and recreation goods in specialized stores (not prev. inc. in other CIs)	476
	477 – Retail sale of other goods in specialized stores (not prev. inc. in other CIs) 478 – Retail sale via stalls and markets	477
	478 – Retail sale via, stalls, or markets	478
	479 – Retail trade not in stores, stalls, or markets	479

General transportation (H)	Division: 49 – Land transport; transport via pipelines	49
	Division: 50 – Water transport	50
	Division: 51 – Air transport	51
	This Group is divided into the following Classes: 52.21/22/23/24/29 – support activities for transportation	522
	Division: 53 – Postal and courier activities	53
	Division: 79 – Travel agency, tour operator, reservation service, and related activities	79
Information and communication (J)	Division: 61 – Telecommunications	61

## Annex 2 Ranking of the contribution of copyright industries to GDP by country

Rank	Country	Share of GDP (percent)
1	USA	11.2
2	Korea	9.89
3	St. Lucia	8
4	Hungary	7.42
5	St. Kitts/ Nevis	6.6
6	Australia	6.6
7	China	6.37
8	Panama	6.35
9	Singapore	6.19
10	Russia	6.06
11	Netherlands	5.9
12	Malaysia	5.7
13	St. Vincent	5.6
14	Romania	5.55
15	<b>Botswana</b>	<b>5.46</b>
16	Bhutan	5.46
17	Lithuania	5.4
18	Canada	5.38
19	Kenya	5.32
20	Slovenia	5.1
21	Latvia	5.05
22	Finland	4.83
23	Philippines	4.82
24	Jamaica	4.81
25	Trinidad & Tobago	4.8
26	Mexico	4.77
27	Lebanon	4.75
28	Ethiopia	4.73
29	Argentina	4.7
30	Grenada	4.6
31	Tanzania	4.56
32	Bulgaria	4.54
33	Thailand	4.48
34	Pakistan	4.45
35	Croatia	4.27
36	South Africa	4.11
37	Indonesia	4.11
38	Malawi	3.46
39	Dominica	3.4
40	Colombia	3.3
41	Ukraine	2.85
42	Peru	2.67
43	Jordan	2.43
44	Brunei	1.58

Source: WIPO (2014) and authors computations

## Annex 3 Overall ranking of copyright industries' contribution to employment by country

Rank	Countries	Share of copyright industries contribution to employment (percent)
1	Philippines	11.1
2	Mexico	11.01
3	Bhutan	10.09
4	Netherlands	8.80
5	USA	8.35
6	Australia	8.00
7	Malaysia	7.50
8	Russia	7.30
9	Hungary	7.28
10	Slovenia	6.80
11	China	6.52
12	Korea	6.24
13	Singapore	6.21
14	Colombia	5.80
15	Thailand	5.63
16	Latvia	5.59
17	Canada	5.55
18	Finland	5.12
19	Trinidad & Tobago	5.00
20	Lithuania	4.92
21	Bulgaria	4.92
22	St. Vincent	4.90
23	Dominica	4.80
24	Croatia	4.65
25	Peru	4.50
26	Lebanon	4.49
27	St. Lucia	4.40
28	Ethiopia	4.20
29	Romania	4.19
30	South Africa	4.08
31	Indonesia	3.75
32	Panama	3.71
33	Grenada	3.6
34	Malawi	3.35
35	Kenya	3.26
36	Brunei	3.2
37	Pakistan	3.17



38	St. Kitts/ Nevis	3.10
39	Jamaica	3.03
40	Argentina	3.00
41	Jordan	2.88
42	Tanzania	2.85
43	<b>Botswana</b>	<b>2.66</b>
44	Ukraine	1.90

Source: WIPO (2014) and authors computations

