

GROWTH AND STRUCTURE OF TANZANIAN'S INDUSTRIAL SECTOR INVESTMENT AND EMPLOYMENT

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Abstract: Tanzania like many other Sub-Saharan African countries is facing a formidable challenge of creating many employment opportunities so as to be able to absorb, each year, about 700,000 new entrants going into the job market or about 200,000 individuals who seek wage employment every year. Industrialization is one of the ways which can help in dealing with this problem. Indeed the experiences of South-East Asian countries show that industrial growth can contribute to the creation of employment opportunities in a sustainable manner. Tanzania's experience, however, shows that the relatively high output growth achieved during reforms since the mid 1980s have not resulted into such increased employment creation. This situation is probably a reflection of the fact that the growth momentum achieved in Tanzania is either inadequate or does not come from investment directed into the labour intensive activities. This paper asserts that in order for the industrial sector to contribute substantially and in a sustainable manner to employment creation in Tanzania then, first the rate of industrial investment must be increased and secondly the pattern of industrial investment must be directed to labour intensive and agro-based industrial activities. Tanzania being basically an agricultural country such investment will have a multiplier effect in terms of employment generation partly due to the linkages effects which such industries might have to the rest of the economy.

INTRODUCTION

The reforms implemented in Tanzania since the mid-1980s have resulted into a turn-around in growth performance. They have reversed the negative or stagnant growth rates which characterized the pre-reform period of the late 1970s to mid 1980s and achieved positive and relatively high real Gross Domestic Product (GDP) growth rates by 1992 prices. An average of 4.4% real GDP growth per annum was recorded in the 1988-1990 period before decelerating to an annual average growth rate of 1.6% in the 1991-1994 period. The real GDP growth rates improved again to 3.6% in 1995 and further to an annual average of 3.8% during the 1995-1998 period.

Alongside the relatively high output growth, unemployment appear to be increasing in Tanzania during the reform period. The country's labour force (defined as the economically active persons in the 15 to 64 plus years age group) is estimated to have been rising from 7.8 million people in 1978 to 10.5 million people in 1988 and to 11.3 million people by 1990 (1978, and 1988 Population Censuses; Labour Force Survey 1990/91). The country's population was estimated at 31 million people by 1998. Between 1960 and 1993 the country's labour force growth rate averaged at 2.8% annually which was lower than the annual population growth rate of 3% for the same period. However, during the 1993-2000 period the

Labour force growth is projected at 3% annually being higher than the country's annual population growth of 2.8% for the same period (World Bank 1995). Tanzania has not been able to absorb all those who enter into the labour force. Between 1986-1987, for instance, only 7,300 new jobs were created compared to an estimated 200,000 individuals who were seeking wage employment. It is now estimated that about 700,000 people join the labour market each year, when the formal sector can absorb not more than 22,000 to 25,000 each year (URT, 1999). Unemployment therefore continues to be quite high. Official data, for instance (URT, 1998) put the unemployment rate at nearly 30%.

Tanzania is thus, experiencing a paradox whereby relatively high output growth are associated with increasing joblessness. This is a reflection of the fact that the growth momentum achieved so far in most sectors including the industrial sector is either inadequate or not directed to labour intensive activities.

Tanzania's, and indeed many other SSA countries' experience, contrasts sharply with the experiences of some East Asian countries. In Asia, industrialized societies like Japan, Taiwan, South Korea and Singapore have, since the 1960s, managed to alleviate most of their poverty through sustaining full employment over long periods. Rapid industrialization in these countries, has played a pivotal role in generating high productivity manufacturing jobs and ultimately facilitated poverty alleviation.

The combination of strong employment

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growth with rising labour productivity in the industrial sector is key to poverty alleviation in developing countries. It is, however, pointed out that policies should not simply focus on investment with the assumption that employment will automatically be created. Depending on the rate and composition of growth, investment in the industrial sector may lead to job creation with the subsequent positive effect on poverty alleviation. In this paper we analyze the extent to which industrial investment is contributing to job creation in Tanzania. It is noted that modern economic development suggests that labor force employment is an integral part of industrialization; and that open and export sectors focusing on labor intensive industrial sub-activities have relatively more potential in terms of sustainable job creation. Thus, the performance and trends of Tanzania's industrial investment and constraints and prospects for job creation is analyzed. At the end the paper makes some recommendations that can both promote economic growth, while at the same time generating employment and raising labour productivity and thereby ultimately alleviating poverty.

The methodology used in this paper is a comprehensive review of literature so as to facilitate an understanding of the broader social, political, economic, and environmental components that make up Tanzania's industrial development landscape.

Secondary data was collected from key institutions dealing with the industrial/manufacturing sector in the country as well as the Bureau of Statistics, industrial section. Data was mainly collected through library search and documentary analysis focusing mainly on the issues at hand; i.e. industrial investments, employment and industrial output. Simple statistical methods were applied for computation of percentages, growth rates, trend analysis, averages, elasticities, and shares.

This paper is divided into six other parts apart from this introduction. The second part is a theoretical framework on the linkage between investment and employment creation. The third part reviews trends in investment and employment in the Tanzania's industrial sector. The fourth part reviews the state of manufacturing sector, industrial investment and resulting job creation. The fifth part analyses the constraints and other aspects impacting on industrial employment. The sixth part gives

some general proposals on making industrial investment create more employment and the seventh part concludes the paper.

THEORETICAL ANALYSIS OF THE LINKAGE BETWEEN INVESTMENT GROWTH AND EMPLOYMENT GENERATION

Employment empowers people economically, socially and politically. It provides not only income for purchasing goods and services, but also contributes to people's dignity by providing them with socially productive roles. By contrast, apart from being a waste of valuable human resources, unemployment is a source of poverty and other human social, economic and political problems. Therefore, targeting new employment creating opportunities is of high priority if a country like Tanzania is to alleviate poverty. There is a close link between investment, employment and poverty alleviation. The nexus between investment in employment and poverty alleviation can best be understood by looking at the factors of employment. In broad terms, employment is the results of four factors.

i) Level of new investment

When new investments are made, firms are able to expand their activities and employ more people. As investment declines, job creation also slows down and unemployment increases, consequently raising the level of poverty.

ii) Type of technological investment

If new investments are made in labor-intensive production, more jobs will be created and *vice versa* for capital-intensive investment. Furthermore, investing in new technologies can improve productivity of a firm which in turn, can lower costs and improve profitability. Competition for market share and for a greater proportion of the profits in the industry pushes firms towards technological change and sustained investment - developments that will have a strong impact on labor demand and the level of unemployment. Productivity improvements and technological change can, in certain cases, displace workers. However, greater levels of investment will encourage employment.

iii) Extent that production capacity is used

If market is available and therefore, companies fully utilize their factories, more jobs will be

required. On the other hand capacity under-utilization results into low incomes and low effective demand which can result into increased unemployment and hence further exacerbate poverty in the economy.

iv) Workers skills

Gaps in workers' skills can limit the ability of a country's residents to gain employment and the ability of private employers to expand their businesses. Workers need to have basic skills, as well as additional job-specific training to increase productivity and reduce poverty.

THE POLICY ENVIRONMENT AND TRENDS IN INDUSTRIAL INVESTMENT

Policy Environment

Tanzania's post independence industrialization experience can be divided into two main phases. First, the period between 1961 to mid 1970s (the independence year), when there was no specific industrialization strategy for the country. Government efforts to influence industrialization were pursued within the development plans, first the three years development plan and then the subsequent five-year development plans.

The second period was that from the mid 1970s to date, where government efforts to influence the sector are pursued through policies specifically formulated to guide development of the industrial sector. Two industrialization policies can be distinguished in this phase: first, the Long Term Basic Industrialization Strategy (BIS) 1975-1995 and second, the current Sustainable Industrialization Development Policy (SIDP) 1996-2020.

During the reform period from the mid 1980s, as also stated in the SIDP, the role of the private sector is greatly emphasized. In recognition of the importance of the private sector development and private investment promotion, the investment promotion centre (IPC) was established in 1991 under the National Investment Promotion and Protection Act (NIPPA) of 1990. It was subsequently revised in 1992 and 1994 and is now known as Tanzania Investment Centre (TIC). Its aim is to improve the investment climate and attract both foreign and local investors. In 1997, more reforms were made to make TIC a one stop investment centre for efficient promotion of private investment. Further reviews of the TIC

operations are being undertaken, including preparation of a strategy to ensure its efficient operation, emphasizing a shift from regulatory functions to promotional activities in collaboration with the private sector. Streamlining of the private sector investment code is continuing. Among others, TIC gives tax incentives to attract investment in various sectors of the Tanzanian economy,

Investment Trends

The overall reforms implemented since the mid 1980s resulted into increased share of the private investment in the manufacturing sector and the contraction of the public manufacturing sector.

Table 1: *Industrial Investment by Ownership (1992 prices, T.shs. million).*

Year	Real Industrial investment	Public (%)	Private (%)
1987	90,334.9	33.9	66.1
1988	53,498.5	38.6	61.4
1989	57,155.6	40.2	59.8
1990	86,070.8	27.2	72.8
1991	89,140.0	34.5	65.5
1992	86,764.0	33.9	66.1

Source: Bureau of Statistics

According to Table I, the share of private investment in industry has been higher than that of the public investment since the 1980s. The World Bank (1996) reports that private manufacturing employment expanded by 7-9% per year during the 1980s. More data on industrial investment and employment by ownership (public and private) is not readily available in Tanzania for the period beginning 1993. However, in general, different reform measures have had different influences on investment and job creation. For instance, the devaluation and liberalization of foreign exchange contributed to increased foreign exchange and so encouraged exporters particularly as the Tanzanian exports became cheaper in export markets. The increased export activities (from expansion activities and new investment) contributed to increased industrial employment. Other reform measures such as the parastatal sector reform led to the closure of some parastatal industries and hence

increased job losses. At the same time the privatisation exercises have made some industries become more efficient and hence increased the ability to employ more people as the productivity and profitability of such industries increased.

The overall impact of reforms on industrial employment is thus not quite clear although there was an increase from 113,567 employees in 1987 to 131,267 employees in 1997 (Economic Survey, various years). Not all this employment is productive, as it still includes employees in the inefficient parastatal industries which are not yet privatized.

STATE OF INVESTMENT AND EMPLOYMENT IN TANZANIA'S MANUFACTURING SECTOR

An Overview

The performance of the Tanzanian manufacturing sector improved during reforms. During the 1987-1997 period, for instance, the sector's real output growth averaged 2.4% compared to the 0.6% at the beginning of reforms in 1986. During the same period, industrial capacity utilization improved to between 40 and 60% compared to between 20 and 30% during the early 1980s. At the same time, manufactured export performance has been mixed and generally remained poor, particularly in the 1990s. In the last three years, for instance, the sector's export growth declined to 1.4% in 1996 and to -5.7% and -3 1.0% for 1997 and 1998 years, respectively. With regard to industrial employment, during reforms employment has tended to increase slightly. It increased from 113,587 people in 1987 to 131,267 in 1997. This type of industrial performance in terms of output and employment growth is partly a result of the pattern and growth of investment made in the sector.

Growth and Structure of Investments in Tanzania's Major Sectors

The World Bank (1996) notes that total investments in Tanzania increased during reforms compared to the crisis period. However, the country's total real investments in the period 1987 - 1997 show a fluctuating trend with a very small (0. 1%) annual average growth.

Table 2: *Growth and Structure of Investments in Major Sectors in Tanzania 1987 - 1997 (in %, 1992 Prices)*

Major sector	Sector's Average share	Sector's Average growth
Agriculture, forestry, Fishing & hunting	3.6	2.3
Mining & Quarrying	0.4	10.9
Manufacturing	23.6	-2.3
Electricity & H ₂ O supply	17.3	-2.6
Construction	12.0	6.9
Wholesale, trade and Hotels	1.50	2.0
Transport, storage, communications	32.6	1.5
Finance, insurance real estate and business services	3.9	22.5
Public admin & other services	5.1	-1.0
Total investment	100	0.1

Source: Own computation using figures from National Accounts and Economic Survey (various issues).

Table 2 shows that small (0.1%) growth of overall investment was largely a result of negative and very small growth rates in the sectors with larger shares in the total investment. Three sectors (with negative average growth), Manufacturing, Electricity and Water Supply and Public Administration and other services had a share of 46%. Transport and Communication sector (32.6% share) also had a small (1.5%) growth. The low investment growth in manufacturing is caused by the poor response of investors to the investment incentives and the unfinished privatisation exercise. This situation is worsened by the negative and small investment growth in sectors (Electricity and Water Supply, Services and Transport and Communications) which provide crucial services to the development of the manufacturing sector. Thus provision of these services continue to be poor and inadequate. This tends to discourage flow of more new investments in the manufacturing sector.

Trends in Manufacturing Employment

Growth and development of the manufacturing sector is generally expected to contribute to creation of many employment opportunities and higher productivity. In Tanzania the manufacturing sector appear to have not contributed greatly in creating employment opportunities.

Table 3: *Manufacturing Employment, Real Value Added, Productivity and Real Investment Indices: 1987-1997 (1992 = 100)*

YEAR	EMPLY ¹	RVA ²	PRDVTY ³	INVTMNT ⁴
1987	89	184	207.1	88.2
1988	91	127	139.7	67.9
1989	93	105	112.4	67.5
1990	98	100	102.5	91.1
1991	99	134	135.3	102.0
1992	100	100	100.0	100.0
1993	101	132	130.6	88.6
1994	101	175	172.7	89.6
1995	101	165	162.4	76.3
1996	100	166	165.3	72.7
1997	102	164	159.4	71.9

Key: 1=Employment, 2=Real Value Added, 3=Productivity, 4=Investment.

Source: Own computation using data from Economic Survey and National Accounts (various issues).

The indices in Table 3 indicate that real investments in manufacturing sector in Tanzania was declining while manufacturing employment was increasing although slightly. Both real value added and labour productivity exhibit a fluctuating and falling trend. Clearly, manufacturing investment during the 1987-1997 period created only few employment opportunities and achieved small productivity and output growth.

Growth, Composition and Employment Output Intensity in Tanzania's Manufacturing Sub-Sectors: 1987/1997

The above performance of the Tanzania manufacturing sector in employment creation is a summary of the performances of the various manufacturing sub-sectors. In terms of employment the Tanzanian manufacturing sector was until 1987 dominated by the food,

beverages and tobacco processing industries (ISIC 311,2; 313 and 314) and the textile, leather and footwear industries (ISIC 321,2; 323 and 324).

Together, these industries contributed over 70% to the manufacturing employment. By 1997 this share declined slightly to 68% caused by a fall in employment in the later (ISIC 321,322, 323, 324) group of industries. Apart from the general constraints facing the Tanzanian industries, these sectors were also worst affected by the stiff competition (sometimes unfair competition) from the cheap imports of similar goods particularly second hand clothes. Most of the increase in manufacturing employment i.e. from 113,567 people in 1987 to 131,267 people in 1997 came from food processing (53.9%), beverages (12.3%) and manufacture of paper products and printing (13.9%). These firms are largely labour intensive and greatly depend on locally obtained raw materials such as agricultural crops and fruits. Increase in employment in these sub-sectors is partly due to increased processing activities of such high-value labour intensive crops particularly vegetables and fruits which are in high demand in the export market.

The high potential for employment creation in the food processing and beverages is also shown by the sub-sector's relatively higher employment elasticity.

Table 5 sums up our estimates of employment elasticities in the the Tanzanian manufacturing sub-sectors for the 1987- 1997 period. These estimates, like most other estimates in this paper, should be taken with great caution. However, these estimates give an indication on the particular manufacturing sub-sector with higher potential for employment generation. Table 5 indicates that the food processing, beverages and tobacco industries have, relative to other industries, higher employment elasticities.

As noted earlier these sub-sectors are the largest employers in the manufacturing sector in Tanzania. They also contributed most to growth in manufacturing employment during the 1987-1997 period. The implications for policy in this case is clear that food processing and beverages and tobacco industries in Tanzania should be encouraged. This is particularly important because Tanzania is largely an agricultural economy and hence such industries will have the desired linkages to the agricultural and other service sectors with the resulting increased employment creation.

Table 4: *Manufacturing Employees by sub-sector, 1987 - 1997*

Sub-sector 3 digit ISIC	1987 (No.)	Sub-sector share (%)	1997 (No.)	Sub-sector share (%)	Annual growth rate (1987-97)	Sector share increase (%)
311,2	28812	25.4	38346	29.2	2.20	53.9
313	4406	3.90	6590	5.00	4.20	12.3
314	4918	4.30	5186	4.00	0.30	1.50
321,2	36596	32.2	34767	26.4	3.60	-10.3
323	1728	1.50	907	0.70	-0.6	-4.6
324	3321	3.00	2838	2.20	-0.2	-2.7
331	3161	2.80	4947	3.80	0.40	10.1
332	1800	1.60	2186	1.70	2.50	2.20
341,2	5165	4.60	7620	5.80	3.60	13.9
351,3	5344	4.70	5029	3.80	-0.4	-1.8
355	905	0.80	888	0.70	-0.4	-0.1
356	504	0.40	795	0.60	4.90	1.60
361,2,9	4332	3.80	5011	3.80	1.90	3.80
371,2, 381	4981	4.40	6252	4.80	2.40	7.20
382	2522	2.20	3666	2.80	4.10	6.50
384	219	1.90	3058	2.30	4.00	5.30
385,390	966	0.90	1184	0.90	2.10	1.20
TOTAL	113567	100	131267	100	—	100

Source: Economic Survey (Various) and own computation

Table 5: *Employment, Value Added Growth and Employment Elasticity in Tanzanian Industries: 1987 - 1997*

Subsector 3-digit ISIC	Employment growth	Value added growth rate	Employment elasticities
311,2	31.0	7.80	3.970
313	38.4	15.2	2.530
314	31.2	8.10	3.850
321,2			
323	-4.1	-64.0	0.640
324	-9.1	-32.3	0.280
331	7.10	-16.1	-0.44
332	22.0	-1.10	-20.0
341,2	41.3	18.20	2.270
351,3	18.3	-4.90	-3.73
355	40.7	17.50	2.330
356			
361,2,9	35.7	12.60	2.830
371,2,381	11.7	-11.5	-1.02
382,3	38.4	15.30	2.530
384	-6.6	-29.8	0.220
385,390	18.5	-4.60	-4.02
TOTAL	25.4	2.30	11.04

Source: Own computation-using data from Economic Survey and National Accounts (various)

Note: Elasticity is defined as employment growth divided by output growth.

However, ensuring high employment intensity growth of such industries will require the

deepening of the process of industrialization especially for exports. Constraints, which affect negatively the exporting of products from such labour-intensive industries and others, should be addressed seriously.

Constraints and other Aspects Impacting on Manufacturing Employment Creation

General Constraints

Growth and development of the manufacturing sector and its substantial impact on employment creation and ultimately poverty alleviation in Tanzania, is constrained by a number of factors. These problems have been documented in various studies (such as Mbelle and Shitundu (1997); Shitundu (1999a, 1999b); Wangwe (1998); and Wangwe and Tsikata (1999)). These problems can be put into five main sub-groups.

- i) Policy problems which are related to the existing rules and regulations. The existing rules and regulations do not adequately provide incentives to attract both domestic and foreign investors despite the economic liberalization efforts corruption and red tapes are still core problems.
- ii) Infrastructure related problem i.e. the state of infrastructure is still far from being conducive for a smooth running manu-

facturing sector. Accessibility, reliability and cost of transport and communication, water and electricity still constrain full capacity utilization of the manufacturing sector.

- iii) Technological/Production related problems i.e. the existing technological base in the country in terms of absolute machinery and skilled manpower is still far from being adequate to the development of modern manufacturing sector.
- iv) Marketing related problems are manifested in the lack of knowledge and marketing skills and lack of promotional services coupled with poor packaging skills and facilities. These reduces the ability of local firms to penetrate export markets.
- v) Lastly, the sector is constrained by difficult access to internal and external sources of credit especially by the resident investors. This problem is exacerbated by poor financial infrastructure in the country, which not only constrains access to credit, but also internal and external money transfers.

These are the constraints that need to be addressed if the manufacturing sector is to grow and develop and therefore create many jobs in Tanzania.

Making Industrial Investment Create More Employment : A Set of General Proposals

This includes the following proposals:

- i) Policy environment must be further improved including deepening institutional reform. For instance, reduction of number and levels of the various taxes, reduction of unnecessary bureaucracies during the processing of investment and enhancement of efforts to fight corruption.
- ii) Improving the provision of reliable and less costly infrastructural facilities such as electricity and water. The government should also facilitate the expansion, improvement and increase of communication facilities, transport and road network and health and education services (investing in human capital). Completion of privatisation processes for provision of major utilities such as water and electricity and increasing collaboration with the private

sector in say road maintenance, rehabilitation and construction. Improvement in these areas can increase the rate and amount of investment opportunities in the private industrial sector and hence better chance of achieving balanced development in terms of employment creation.

- iii) Supporting and encouraging vocational training such that the formal apprenticeship together with the accelerated training should produce workers with the proper and adequate mix of quality skills and abilities required by the joint ventures and medium and large scale industrial enterprises. With regard to micro, small enterprises and informal manufacturing activities ways of training (apprenticeship) for the required workers should be charted out. Provision of both traditional and non-traditional skills to individuals particularly youth should receive more support because its implications on employment generation (self-employment) and poverty reduction is great. All these (increased skills) will help a large number of workers to have access to jobs, which are not lowly paid and so contribute to poverty reduction. Improving labour market policies, including reforms of pension (given that real earnings are falling even in manufacturing) so that those who retire can engage in productive micro and small industrial investment which can further lead to more employment creation.
- iv) Achieving higher, strong and stable output growth in the manufacturing sector will result in rising aggregate demand for labour and hence more jobs will be created in the high-paid, high productivity activities. To achieve this requires first, solving the production related problems such as technological problems, shortage of raw materials (particularly agricultural crops), power and water problems among others. Second, it requires promoting the export performances particularly in labour intensive activities such as processing of vegetables and fruits, textiles and among others. Marketing related problems such as lack of marketing skills and promotional services in both the domestic and export markets should also be solved.
- v) Finding ways to solve the problems of lack of credit facilities. For large scale

industries what is most required is the completion of financial sector reform (including the privatisation of the national Bank of Commerce) which can thereafter provide credits. However, for medium, small and micro ways should be found for using non-conventional credit windows such as the credit delivery approach and facility by the Small Industrial Development Organization (SIDO); more savings and credit cooperatives or associations, among others.

CONCLUDING REMARKS

One of the major challenges which Tanzania is facing is to create more employment particularly given its high population growth and faster growing labour force. Industrial investment has, in principal, great potential in the long term for employment absorption via industrial value-added. However this depends on the pattern and rate of growth of such investments and output.

A review of the state and structure of the manufacturing sector in Tanzania over the last ten years of reforms indicate that the sector is characterized by:

- ◆ A comparatively higher share of manufacturing in the total investment which is quite small. Industrial investment is also growing slowly.
- ◆ Increasing private sector participation
- ◆ Relatively improved industrial output growth and mixed export performance.
- ◆ Various constraints constraining industrial investment, production export and employment creation. These including policy related problems, infrastructural problems, poor technology and low human resource development, marketing problems and shortage of credit facilities.
- ◆ Generally, low industrial employment growth. However, some sub-sectors such as Food processing, beverage and tobacco have relatively high employment elasticities. This means that output growth in these sub-sectors has higher potential for creating more employment.

The overall picture emerging here is that the pattern and rate of industrial investment have

not managed to create many employment opportunities and the various opportunities and potentials, which exist in Tanzania particularly in the agro-based industries such as food processing, beverages and tobacco.

In order to make industrial investment contribute more to employment creation, Tanzania needs to:

- ◆ Address the above mentioned infrastructural constraints and shortage of credit facilities;
- ◆ Encourage and promote labour-intensive industrial investment and activities (which also depend more on locally available raw material) such as food processing and beverages;
- ◆ Invest in various training programmes e.g. vocational training so as to raise the skills of workers and those expected to be employed;
- ◆ Upgrade the informal sector;
- ◆ Undertake further reforms in the labour market rules.

These measures and efforts are essential if industrial investments in Tanzania are to create many employment opportunities and so contribute to reducing significantly the unemployment problem in the country.

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