Fast-tracking implementation
of eTrade Readiness Assessments

UNITED NATIONS

Geneva, 2020

NOTE

Within the UNCTAD Division on Technology and Logistics, the ICT Policy Section carries out policy-oriented analytical work on the development implications of information and communication technologies (ICTs) and e-commerce. It is responsible for the preparation of the Digital Economy Report (DER) as well as thematic studies on ICT for Development.

The ICT Policy Section promotes international dialogue on issues related to ICTs for development and contributes to building developing countries' capacities to measure the information economy and to design and implement relevant policies and legal frameworks. It also monitors the global state of e-commerce legislation (unctad.org/cyberlawtracker). Since 2016, the Section has coordinated a multi-stakeholders' initiative entitled eTrade for all (etradeforall.org), which aims to improve the ability of developing countries, particularly least developed countries (LDCs), to use and benefit from e-commerce. The initiative is also behind the new eTrade for Women program, launched in 2019, which aims to promote a more gender-inclusive digital economy, in particular through its network of Ambassadors. These digital entrepreneurs are active in all developing regions and contribute to capacity- building, mentoring and awareness raising activities for more inclusive gender policies. Reference to companies and their activities should not be construed as an endorsement by UNCTAD of those companies or their activities.

The following symbols have been used in the tables: Two dots (..) indicate that data are not available or are not separately reported.

Rows in tables have been omitted in those cases where no data are available for any of the elements in the row;

A dash (-) indicates that the item is equal to zero or its value is negligible;

Reference to "dollars" (US$) means United States of America dollars, unless otherwise indicated;

Details and percentages in tables do not necessarily add up to the totals because of rounding.

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ABBREVIATIONS

2G/3G/4G/ LTE/5G	Mobile Internet spectrums
ASEAN	Association of Southeast Asian Nations
ATM	Automated teller machine
BFM	Central Bank of Madagascar
BITC	Bhutan Innovation and Technology Centre
BMZ	Germany's Federal Ministry of Economic Cooperation and Development
CERP	Myanmar's COVID-19 Economic Relief Plan
COVID-19	Coronavirus disease
CTIS	Cambodia Trade Integration Strategy
DER	Rapid Entrepreneurship Delegation for Youth and Women
EAC	East Africa Community
ECOWAS	Economic Community of West African States
EIF	Enhanced Integrated Framework
eT Ready(ies)	eTrade Readiness Assessment(s)
EU	European Union
GSMA	Global System for Mobile Communications Association
ICT	Information and communication technology
ITC	International Trade Centre
ITU	International Telecommunication Union
JICA	Japan International Cooperation Agency
LDC	Least Developed Country
MFI	Micro-finance institution
MSDP	Myanmar Sustainable Development Plan
MSMEs	Micro-, small-, and medium-size enterprises
M-STEP	Myanmar - Services Trade Enhancement Project
NITA-U	National Information Technology Authority-Uganda
NTDC	Vanuatu's National Trade Development Committee
PIFS	Pacific Islands Forum Secretariat
PPD	Public-private dialogue
PPP	Public-private partnership
QR	Quick response
RCO	Resident Coordinator Office
SME	Small and medium enterprise
SNDCES	Stratégie nationale de développement du Commerce électronique au Sénégal
SPT	Société des Postes du Togo
TFA	Trade facilitation agreement
TPFU	Vanuatu's Trade Policy Framework Update
UNCDF	United Nations Capital Development Fund
UNCITRAL	United Nations Commission on International Trade Law
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme

UNESCAP	United Nations Economic and Social Commission for Asia and the Pacific
UN-OHRLLS	United Nations Office of the High Representative for the Least Developed Countries
UPU	Universal Postal Union
USAID	United States Agency for International Development
USF	Universal Service Fund
USSD	Unstructured supplementary service data
WAEMU	West African Economic and Monetary Union
WTO	World Trade Organization
ZICTA	Zambia Information and Communications Technology Authority

FOREWORD

The cross-cutting nature of the digital economy and productivity-enhancement potential of e-commerce have been widely recognized as powerful development drivers that can be harnessed for the achievement of the Sustainable Development Goals. The COVID-19 crisis has emphasized the need to accelerate digital transformation agendas in developing countries and LDCs, considering the role played by e-commerce and digital solutions in increasing the resilience of local socioeconomic systems.

The UNCTAD eTrade Readiness Assessment (eT Ready) Programme has been designed to identify and address challenges in the development of e-commerce encountered by developing countries and particularly LDCs. It seeks to provide a thorough overview of the current e-commerce ecosystem and recommend conducive policy measures in seven key policy areas as defined by eTrade for all. In the past three years, 27 assessments (eT Readies) have been conducted out of the 43 countries requests received, including increasingly from non-LDCs. UNCTAD has now developed an eT Ready Evaluation and Monitoring strategy to assess the progress in the implementation of the recommendations contained in the assessments and to document good practices, policy impacts and lessons learned. At the same time, the strategy will help assess the objectives of the eT Ready Programme, improve the delivery, as well as guide further developments of the Programme. The value added of the assessments will be maximized only if countries implement the recommendations, for which more support of the development community is needed.

This report is UNCTAD's first endeavor to carry out a comprehensive eT Ready monitoring exercise that should contribute to fast-track implementation of eTrade Readiness Assessments. The report's findings largely rely on information that countries volunteered to collect and share. It aims to capture progress in the seven policy areas constituting the building blocks of the eTrade for all partnership and scores the implementation level in 13 out the 18 countries reviewed. This report is not a purely theoretical exercise to assess and compare countries' performances. Rather, it aims to be a practical tool to better understand the level of efforts undertaken in eT Ready beneficiary countries and contribute to moving the e-commerce development agenda forward in line with the countries' eT Readies Action Matrix and countries' policy priorities as well as development partners' strategies.

In that context, I would like to thank the Government of Germany for its contribution to eT Ready Programme including the implementation monitoring efforts. Additionally, my thanks go to the governments of Sweden and Australia, the Enhanced Integrated Framework (EIF) and the International Islamic Trade Finance Corporation (ITFC), which are currently promoting the digital development of developing countries by supporting UNCTAD's eT Ready Programme.

I also wish to acknowledge eTrade for all partners who contributed to the content of the assessments. I hope this report will further help them mobilize the much-needed support to advance the e-commerce development agenda in eT Ready beneficiary countries. The eT Ready Programme is part of the eTrade for all initiative, which offers an online space to learn about e-commerce related capacity-building programmes offered by the 32 development partners members of the initiative. Connecting the dots is UNCTAD' s value-added contribution to the quest for a truly global inclusive trade.

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ACKNOWLEDGEMENT

INTRODUCTION

E-commerce and digital economy in general have been increasingly recognized as powerful drivers to harness the potential of information and communications technologies (ICTs) to achieve the 2030 Agenda and contribute towards to several Sustainable Development Goals, in areas such as women's economic empowerment (Goal 5.b), productive activities, decent job creation, entrepreneurship, creativity and innovation (Goal 8.3), financial inclusion and integration into value chains (Goal 9.3), and building export capacities (Goal 17.11).[1]

Discussions about e-commerce and development have gained momentum in various fora, including at UNCTAD, WTO and the G20, as well as at the regional/continental level, such as in the context of the ASEAN e-commerce agreement and Phase III negotiations of the African Continental Free Trade Area. There has been a commensurate growing interest from least developed countries (LDCs) and developing countries alike to identify the main bottlenecks and assess their readiness to engage effectively in e-commerce activities.

Born as a spin-off of the eTrade for all partnership in 2016, the UNCTAD eTrade Readiness Assessment Programme (also known as eT Ready) was first designed to provide a thorough overview of the e-commerce ecosystem in Least Developed Countries. To meet this demand, the eT Ready Programme has constantly expanded its reach and updated its methodology to cater to the needs of a growing and more diverse beneficiary pool of countries. To date, 27 countries have benefited from an eT Ready Assessment. The eT Ready Assessments are serving as tools to identify critical readiness gaps and recommend conducive policy measures through a comprehensive Action Matrix.

Several knowledge sharing activities have been organized by UNCTAD and its partners to take stock of findings, good practices and lessons learned, as well policy impacts, emerging from the conduct and implementation of the assessments.[2] At the same time, a consensus has emerged among eT Ready beneficiary countries and eTrade for all partners about the need to accelerate the implementation of recommendations contained in the assessments and to mobilize development partners' support to spearhead implementation. UNCTAD has taken the lead in conducting a structured monitoring exercise that could capture the progress and achievements of countries in terms of building an enabling environment and conducive ecosystem for e-commerce development. The support from the Germany's Federal Ministry of Economic Cooperation and Development (BMZ) was instrumental to undertaking this first monitoring exercise.

The methodology presented later in the report was specifically designed, tested and used to conduct this first eT Ready monitoring exercise targeting a cohort of 18 countries that have benefited from an eT Ready Assessment as of June 2019. The countries covered are: Burkina Faso, Lesotho, Liberia, Madagascar, Senegal, Togo, Uganda and Zambia in Africa, Afghanistan, Bangladesh, Bhutan, Cambodia, Lao People's Democratic Republic (PDR), Myanmar and Nepal in Asia, Samoa, Solomon Islands and Vanuatu in the Pacific Islands region. Out of these 18 countries, Samoa is the only non-LDC.

The main analytical tool supporting the eT Ready monitoring work was a comprehensive questionnaire, specifically designed to take stock of actions implemented by countries, corresponding to the seven eTrade for all policy areas and itemized sub-policy areas. The monitoring questionnaire was first shared with the 18 eT Ready country Focal Points and Geneva-based Permanent Missions of eT Ready beneficiary countries to the United Nations Office in Geneva, in February 2020. The eTrade for all partners were also involved in the monitoring exercise and were invited to share information about ongoing and planned work supporting eT Ready recommendations in the countries under

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[1]   See https://unctad.org/meetings/en/SessionalDocuments/tdb_ede1d2_en.pdf

[2]   See https://etradeforall.org/development-solution/e-t-ready-rapid-e-trade-readiness-surveys-least-developed-countries-getting-started-e-commerce-development/?main-policy=e-commerce-assessments

review. Furthermore, UNCTAD has reached out to United Nations Resident Coordinator Offices in the 18 countries, to take stock of existing level of engagement of the United Nations' Country Teams of development cooperation frameworks in the areas of e-commerce and digital economy.

The operational phase of this monitoring exercise took place between February and June 2020, amidst the outbreak of the Coronavirus disease pandemic (COVID-19). The COVID-19 crisis has accelerated the uptake of digital solutions, tools, and services, speeding up the global transition towards a digital economy. However, it has also exposed the wide chasm between the connected and the unconnected, revealing just how far behind many are on digital uptake.[3] Considering the growing importance of digital technologies during the pandemic, UNCTAD has organized a downsized version of the flagship eCommerce Week, in the form of a virtual eWeek, in collaboration with the eTrade for all partners, in April 2020. The eWeek looked in depth at key digital issues in the context of the COVID-19 pandemic and its economic impact, including data, gender, trade and logistics, consumer trust, consumer protection, competition and digital entrepreneurship.[4] In addition, UNCTAD has been assessing the impact of the COVID-19 on e-commerce businesses and the policy implications for the ongoing e-commerce sector development agenda in eT Ready beneficiary countries. This has in part benefited analysis carried out in the context of the eT Ready monitoring exercise, but a more comprehensive analysis of the COVID-19 impact on e-commerce will be presented separately.[5]

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[3]   See https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=2322

[4]   See https://etradeforall.org/app/uploads/2020/05/eWeek2020finalsummaryreportFINALVERSION-4.pdf

[5]   Evidence collected through consultations with different public and private stakeholders in several countries are also presented in this report. These have also been the object of case studies shared as UNCTAD news items. An ad-hoc UNCTAD publication will present the results of a structured survey conducted in 23 countries, see UNCTAD (2020), COVID19 and e-commerce. Impact on businesses and policy responses, forthcoming.

EXECUTIVE SUMMARY OF FINDINGS, LESSONS LEARNED AND RECOMMENDATIONS

Key findings

The findings emerging from the eT Ready monitoring exercise are primarily based on the analytical results and further research conducted by UNCTAD on the basis of questionnaires received from 13 countries, which allowed in-depth analysis in the form of a scored performance assessment. Additional information has been gathered through desk research and interviews, covering the whole cohort of 18 countries reviewed in the report. The number of actions taken by countries and documented in the report leads to different levels of eT Ready recommendations' implementation rates as a result of the scored performance assessment as per Figure 1: Total implementation rate by country. The overall implementation rate in these 13 countries stands at 50 per cent.

Figure 1   Total implementation rate by country
(Percentage)
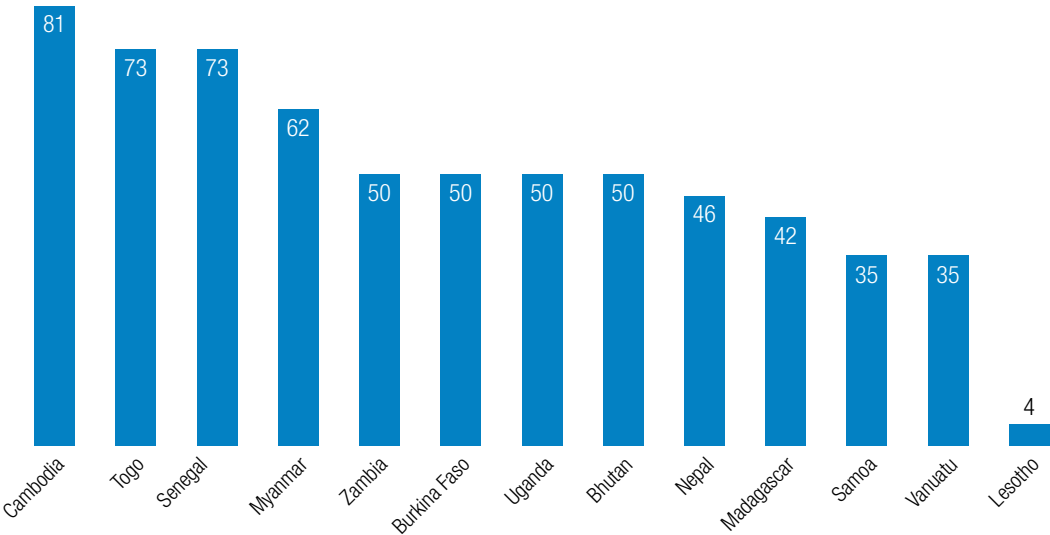
Source: UNCTAD. Note: the implementation rate is calculated as the number of recommendations implemented by the country (see Annex 1) divided by 26, the number of scored thematic items considered in this report.

Implementation rate by policy area takes into account the implementation of recommendations in relative terms, namely the percentage of total actions undertaken by countries vis-à-vis the whole set of implementable recommendations. Figure 2 highlights payment solutions as the policy area that has received the greatest attention by countries, followed by ICT infrastructure and services. Together with the legal and regulatory framework, as well as trade facilitation and logistics, these policy areas feature an implementation rate above 50 percent. Access to financing remains a critical bottleneck, particularly for Micro-, Small- and Medium-size Enterprises (MSMEs) in LDCs. Overall progress on implementation to improve countries' e-commerce readiness stands at 48 per cent.

Figure 2   Implementation rate by policy area across all countries
(Percentage)
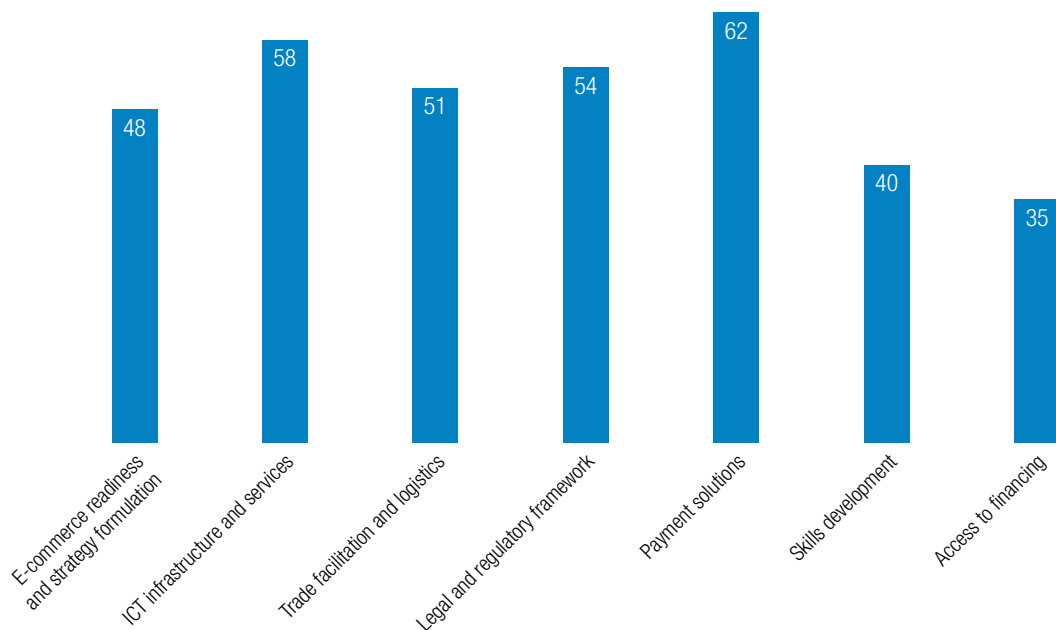
Source: UNCTAD. Note: This is calculated by taking the total number of recommendations implemented by policy area across all countries and dividing each value by the highest possible number of implementable recommendations by policy areas by all countries.

Highlights for the seven policy areas

E-commerce readiness and strategy formulation

There are promising developments on national e-commerce strategies' formulation. In Cambodia, Nepal and Senegal, eT Readies have provided a sound basis for defining action plans within their national e-commerce development strategies, all supported by the Enhanced Integrated Framework for LDCs (EIF). A few additional countries are in the process of developing a national e-commerce strategy, such as Myanmar with UNCTAD support, as well as Uganda and Zambia. Further countries are actively looking for development partners' support, such as Madagascar and Togo. Bhutan, Burkina Faso, Lesotho and Samoa have expressed interest in prioritizing an e-commerce strategy during this monitoring exercise. In West Africa, Regional Economic Communities, such as the Economic Community of West African States (ECOWAS) and West African Economic and Monetary Union (WAEMU) are taking stock of the eT Readiness Assessments (eT Readies) conducted in eight countries to advance on a regional e-commerce strategy with UNCTAD

assistance. Interesting developments have been registered in public-private dialogue and policy coordination mechanisms, with novel public-private sector cooperation emerging in response to the COVID-19 crisis. The contribution of e-government to advancing countries' digital agenda is increasing its relevance in LDCs. Bhutan, Bangladesh and Cambodia moved from the middle to the high E-Government Development Index group in 2020.[6] Significant gaps remain in terms of availability of statistics on e-commerce transactions.

ICT infrastructure and services

In LDCs still only 19 per cent of the population use the Internet, and at a high cost, compared to 87 per cent in developed countries. Digital divides are even more exacerbated by significant urban/rural disparities in access and a widening gender gap in Internet use. Only 40 per cent of the population is covered by high-speed mobile network in LDCs (LTE or higher), and the percentage is even lower in Africa (38 per cent), where coverage is concentrated in the main urban areas. The gender gap is significant and growing in LDCs from 30 per cent to 43 per cent between the period 2013-2019, as noted by the latest ITU estimates.[7] In Burkina Faso, Liberia, Madagascar, Nepal and Togo, the price of 5Gb Internet data packages can cost as much as 20 per cent or more of average income.[8] Most of the countries that have benefited from an eT Ready have placed the need to connect their territories at the forefront of their development policies through major investments in ICT infrastructure and measures to ensure an affordable and reliable access to ICT. Many LDCs are already rolling out plans to deploy 5G networks, including Cambodia, Madagascar, Nepal, Senegal, Togo and Uganda. LDCs still face major disparities in energy access between urban and rural populations. Also, regional disparities remain significant: African LDCs' electrification rate of 33.2 per cent, lags behind Asia-Pacific LDCs' rate of 86.2 per cent.[9]

Trade facilitation and logistics

Efforts are undertaken in parallel with several initiatives, from both the public and private sectors, to improve the e-commerce logistics services and supply chain infrastructure. Such initiatives have included the ambitious projects to establish and extend reliable addressing systems in which many assessed countries are now involved. Nevertheless, more impetus is needed to spearhead implementation of the Trade Facilitation Agreement (TFA), a recognized enabler for e-commerce development. Out of the 18 countries under review only Cambodia, Liberia, Samoa, Senegal, Togo and Vanuatu stand out with a TFA implementation rate exceeding 60 per cent; Cambodia excels with almost 85 per cent of implementation.[10] Cambodia is making strides towards easier cross-border e-commerce and trade. According to a UNESCAP assessment,[11] achieving cross-border paperless trade could help Cambodia save over $200 million in trade transaction costs annually.

Legal and regulatory framework

Countries reviewed are either assessing gaps in their legal frameworks or pursuing new law initiatives, covering electronic transactions, consumer and data protection, cybercrime, and other relevant areas of legislation. The eT Readies have provided momentum for legal framework reviews and stressed the importance of a holistic approach to e-commerce development, with greater emphasis on fostering regional integration processes, as has been the case in West Africa (ECOWAS/WAEMU), East Africa (EAC), and Asia-Pacific, with work undertaken by ASEAN and PIFS. More efforts are needed to build awareness and sensitize businesses and consumers on legal provisions applying to e-commerce transactions in order to increase trust in doing business online.

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[6]   See https://www.un.org/development/desa/publications/publication/2020-united-nations-e-government-survey

[7]   See https://www.itu.int/en/ITU-D/Statistics/Documents/facts/FactsFigures2019.pdf

[8]   See https://a4ai.org/extra/mobile_broadband_pricing_gnicm-2019Q2

[9]   See https://www.un.org/ohrlls/news/urgent-action-needed-scale-energy-access-world%E2%80%99s-poorest-countries-0

[10]   According to the Trade Facilitation Agreement database, data analyzed on 30 June 2020.

[11]   See https://www.unescap.org/resources/readiness-assessments-cross-border-paperless-trade

Payment solutions

This is the most dynamic area according to the eT Ready implementation rate. Digitalization is changing the mindset of customers and the culture of purchasing goods and services offered through digital channels. The trend is powered by investments by public and private sectors in e-payment solutions to stimulate a cashless economy. The COVID-19 pandemic has accelerated this trend, particularly in Africa. The most consistent trend in payment innovations across countries is QR-based payments. Working examples of such payment solutions have been reported in Bangladesh, Bhutan, Cambodia, Nepal, Senegal, Togo, Uganda and Zambia, and recently launched in Lao PDR. Digitalization is also fostering considerable changes in Posts' strategic objectives by requiring them to increase their offerings to meet customer requirements. Despite positive developments and the three-digit growth of mobile money in Africa over the last few years, more attention is needed to promote financial inclusion and international cooperation to encourage cross-border e-payment solutions and interoperability of different e-payment platforms.

Skills development

In line with eT Ready recommendations, diverse initiatives have recently been undertaken to tackle gaps in e-commerce skills, particularly through a dynamic constellation of private sector-led digital entrepreneurship initiatives. A growing number of countries are integrating ICT skills in their schools' and advanced education curricula. Incubator programmes, competitions and prizes are mushrooming to help entrepreneurs develop their e-commerce and digital economy skills. Senegal is leading efforts in the African continent to create a sound digital innovation and entrepreneurial ecosystem, being the first country in Sub-Saharan Africa to pass a StartUp Act. Through the eTrade for all spin-off programme, eTrade for Women, women digital entrepreneurs in developing countries and LDCs are empowered with the tools and skills to thrive in the digital economy and engage in public policy. The lack of public sector capacity to support e-commerce skills development initiatives still requires further attention.

Access to financing

This policy area scored the lowest eT Ready implementation rate. All responding countries have identified lack of funding and access to financing as paramount challenges. Private sector-led initiatives to provide access to financing for digital entrepreneurship initiatives remain limited, particularly through the banking system. Start-up incubators that combine financial support and entrepreneurship training are increasingly gaining traction. Although the gender gap is not limited to access to finance in support of entrepreneurial innovations, women-run digital businesses are even more disadvantaged, as recent research has shown how women-led start-ups receive significantly less funding than those with all-male founders.

Challenges and gaps

Overall, the monitoring exercise has confirmed that priorities outlined in their eT Readies Action Matrix recommendations remain relevant for the countries. However, the COVID-19 crisis has accentuated the need to accelerate digital transformation in developing countries and LDCs,[12] considering the role played by e-commerce and digital solutions in increasing the resilience of local socioeconomic systems. Country experiences from Cambodia,[13] Myanmar,[14] Senegal[15] and Uganda[16] have all highlighted the tremendous importance of greater public-private cooperation, affordable Internet connectivity, increased use of digital payment solutions, and incentives for digital innovation as good practices for a digital-led COVID-19 response and recovery strategy.

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[12]   See https://unctad.org/en/PublicationsLibrary/dtlinf2020d1_en.pdf

[13]   See https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=2401

[14]   See https://unctad.org/news/myanmar-shows-great-e-commerce-promise-covid-19-response

[15]   See https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=2342

[16]   See https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=2442

Ten countries highlighted project priorities for which support is needed, spanning across the seven policy areas (see Table 2). All countries, but one, have expressed funding shortages as a major bottleneck in spearheading implementation of eT Ready recommendations. The only notable exception is Cambodia, which has been able to attract a satisfactory amount of technical assistance for implementation. This is also positively reflected in the overall eT Ready implementation rate seen in Figure 1.

Countries' feedback has underscored the untapped potential of more active engagement with eTrade for all partners. Country experiences suggest that partnerships between beneficiary countries, the private sector and development partners can help spearhead reforms and investments, and even more so in times of crisis. While countries confirmed priority recommendations and projects, there is a shared plea for receiving targeted support to turn recommendations into bankable projects, through technical assistance on sound project design and to foster dialogue for resource mobilization.

Lessons learned

Countries' participation in this first structured eT Ready monitoring exercise has been very encouraging, both in terms of the quantity and quality of responses received. More than 70 per cent of targeted countries provided a response, showing that there is a relatively widespread political and technical leadership committed to the eT Ready process. However, several factors affected either a non-response or a low-quality response to the questionnaire submitted to UNCTAD.

Weak institutional capacities and policy coordination mechanisms are still important bottlenecks to ensure adequate eT Ready follow-up at the national level. These translate into high staff turnover and low capacity retention, limited prioritization of e-commerce, unclear institutional responsibilities of the eT Ready process and insufficient interministerial coordination. In some cases, it was possible to overcome such challenges by extending the deadline for submission of countries' responses, also considering the impact of the COVID-19 outbreak on the operational capacities of public and private sectors alike. In other cases, complementary research by UNCTAD was needed to provide more clarity about some information provided. Follow-up actions by Permanent Missions from Geneva was also useful in some cases. The time lag between the release of the eT Ready Assessment and this monitoring exercise contributed to explaining differences in responses and different implementation rates. For instance, the Cambodia eT Ready was done in 2017, while the Lesotho eT Ready was only completed in 2019. Overall, the absence of well-established, in-country eT Ready monitoring structures has inhibited a more effective and efficient participation in this monitoring exercise for some countries.

The engagement of eTrade for all partners in this eT Ready monitoring process can be further improved. Only in a very few cases, have inputs been provided to assess ongoing and planned technical assistance at the country level in their respective policy areas. A concerted holistic approach will enhance transparency and maximize synergies in the support provided to countries to foster eT Ready implementation by making better use of the existing eTrade for all platform. Positive feedback has been received by UN Country Teams that are increasingly looking at ways to promote digitalization as part of national development assistance frameworks. The leading role currently ensured by the Lao PDR UN Resident Coordinator Office in mainstreaming e-commerce development support into UN Country Team strategies is a case in point. Such experience has been even more accentuated in the context of the COVID-19 response and recovery assistance.

Recommendations

The report confirms the commitment of eT Ready beneficiary countries to translate recommendations of the assessments into action, but more can be done by the development partners' community to scale-up their support. The eTrade for all partnership is uniquely placed to assist efforts of developing countries and LDCs. In various fora, eTrade for all partners have recognized UNCTAD's leadership and convening role, building on the useful work done on the ground through the eT Readies. A consensus has emerged among eTrade for all stakeholders on the role played by the

assessments to trigger inclusive processes at the country level that foster an enabling environment for the e-commerce ecosystem and digital economy development. UNCTAD's work in assessing the impact of COVID-19 has further underscored the importance of digital solutions and e-commerce. At the same time, the work has shown how global digital divides are slowing down efforts towards reaching SDG targets. As a result, the important collaborative efforts at the international level and inclusive partnerships can go a long way towards strengthening digital economy ecosystems in developing countries and LDCs.

This report highlights practical recommendations to sustain such efforts, and foster an enabling environment for sound management and monitoring processes to fast-track implementation of eT Ready recommendations, with increased engagement of development partners.

eT Ready beneficiary countries would gain from:

1. Mainstreaming eT Ready recommendations into the implementation mechanisms of national development strategies and sectoral plans;

2. Establishing a steering committee led by the identified Focal Point to enhance policy coordination, provide strategic leadership and monitor eT Ready implementation;

3. Identifying "champions" across different public and private sector entities from the seven eT Ready policy areas to take part in the steering committee;

4. Translating the eT Ready Action Matrix into a comprehensive Action Plan and request support from development partners, if needed; and

5. Using the eT Ready Action Matrix as a basis to mobilize support and catalyze development partners' commitments.

Development partners should consider:

1. Making strategic use of the eT Ready as a development assistance needs assessment and planning tool;

2. Planning country-specific technical and financial assistance based on country priorities and solid analytical foundations provided by the eT Readies;

3. Engaging with other partners under the umbrella of the eTrade for all partnership to organize coordinated actions and speak with governments using a harmonized approach;

4. Mainstreaming e-commerce and digital economy into policy dialogue and development assistance frameworks in eT Ready beneficiary countries, building on the enhanced role of UN Resident Coordinators;

5. Providing support to governments in costing activities, especially through capacity-building for leading government agencies, as well as advisory services to articulate bankable projects through inclusive processes.

To sum up, implementation of eT Readies' recommendations is moving at varying speed. To avoid further widening existing digital divides, a coordinated response between governments in developing countries and LDCs with development partners is urged to meet the persisting development challenges, further aggravated by the consequences of the COVID-19 crisis. The recommendations outlined in this report will serve as a guide for UNCTAD's further engagement with eT Ready beneficiary countries and development partners. Building on principles of country ownership, accountability and transparency, UNCTAD's role will be instrumental in helping countries to accelerate their digital transformation, by helping them monitor their advances, sharing good practices among different stakeholders, facilitating networking and mobilizing support for fast-track eT Ready implementation under the umbrella of the eTrade for all partnership.

METHODOLOGY

The methodology of this report is structured around four main phases between October 2019 and October 2020. The four phases have been dedicated to i) design of the monitoring methodology and testing of the questionnaire, ii) questionnaire-based engagement with stakeholders, iii) analysis and report drafting, iv) review and feedback from stakeholders, editing, finalization and public release.

Figure 3   Monitoring methodology workflow

October 2019 - February 2020	February - June 2020	July - August 2020	September - October 2020
Design and testing	Engagement with stakeholders	Analysis and reporting	Review and finalization
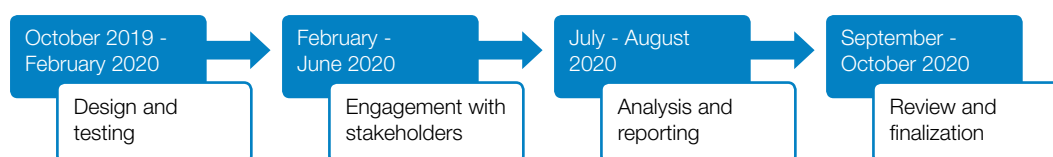
Phase 1 - Design and testing

The methodology for monitoring implementation of the eT Ready Assessments builds on the outcomes of the knowledge-sharing activities organized by UNCTAD and its partners to take stock of findings, good practices and lessons learned, as well policy impacts that emerged from conducting and implementing the eTrade Readiness Assessments. As cornerstone of the monitoring methodology, a questionnaire was carefully crafted. The questionnaire was tested in two pilot countries to receive feedback and ensure it was in line with stakeholders' expectations. The testing phase took place between October 2019 and January 2020, and the questionnaire was finalized in February 2020. A stakeholders' need assessment was also updated to confirm target groups and engagement strategy. As a result, country counterparts (eT Ready Focal Points, resources persons, Permanent Missions in Geneva) were confirmed. A succinct questionnaire was developed for eTrade for all partners to capture ongoing and planned eT Ready implementation support in their respective policy areas at the country level. An engagement strategy with UN Country Teams was planned through UN Resident Coordinators' Offices (UN RCOs) in the eT Ready beneficiary countries, with the objective of mapping activities on the ground and identify synergies. The final list of countries to be involved in this first monitoring exercise was decided, namely the 18 countries that completed an e Trade Readiness Assessment by June 2019.

Phase 2 - Engagement with stakeholders

At the end of February 2020, UNCTAD informed all the three main stakeholder groups, namely country Focal Points, eTrade for all partners and UN RCOs about the current eT Ready monitoring exercise. All three groups were invited to participate in the ongoing monitoring exercise by providing a structured response and sharing information, through the designed questionnaires. The process was scheduled to be completed in no more than two months, with preliminary findings ready in time for the UNCTAD eCommerce Week that was supposed to take place in Geneva in April 2020. However, the outbreak of the COVID-19 pandemic affected the way stakeholders, including UNCTAD, have had to reorganize priorities, deadlines and working arrangements. As a result, the timeframe for stakeholders' engagement was extended to the end of June 2020 to allow countries and other stakeholders more flexibility in organizing their response.

Phase 3 – Analysis and reporting

The analytical phase was mainly based on a careful analysis of the information provided through questionnaire responses received from monitored countries, as well as completed questionnaires received from eTrade for all partners and information from the follow-up with UN RCOs. The analytical process was guided by the following steps led by UNCTAD eT Ready monitoring team:

- Map the information collected to clean data and prepare them for a comprehensive analysis;

- Check information to ensure relevance of the information provided, to avoid duplicating information provided in the eT Ready;

- Document evidence through further research, by referencing publicly available sources;

- Capture real progress, by singling out milestones and achievements; and

- Identify country commonalities, common trends, thematic highlights and computation of collected data.

Based on the organized evidence, the overall eT Ready recommendations' implementation rates by country and policy area were rated using a scored performance assessment based on collected statistics. The findings are presented in the executive summary and, more exhaustively, in the relative policy area chapter. The relevance of this scored performance assessment is largely dependent on the quantity and quality of the monitoring questionnaires' responses. Bottlenecks with respect to country responses and their quality are highlighted among the lessons learned drawn from the monitoring exercise.

The scored performance assessment builds on the structure of the questionnaire and in particular on the questions under the seven policy areas. To do so the questions are grouped to map into thematic items that feature recurrently in the eT Ready Assessments and their recommendations. A total of 28 thematic items, each policy area has a variable number of them, and all (marked in green) except two have been used to rate countries' performance. Consequently, this monitoring assessment is based on a total of 26 computed thematic items, as presented in Table 1 below.

Table 1   List of thematic items under each policy area used to assess eT Ready implementation performance

Thematic item	Policy area (No. of rated thematic items)
S1a- Strategy development (done or ongoing)	E-commerce readiness and strategy formulation (5)
S1b- Strategy development (looking for support/expressed interest)*	
S2a- Policy coordination and dialogue (committees/working groups)	
S2b- Policy coordination and dialogue (e-commerce associations)	
S2c- Policy coordination and dialogue (eT Ready dissemination)**	
S2d- Policy coordination and dialogue (eT Ready monitoring)**	
S3- Availability of new e-government services[17]	
S4- E-commerce statistics availability	
I1- ICT infrastructure development	ICT infrastructure and services (4)
I2- Mobile Internet connectivity	
I3- Internet affordability	
I4- Access to electricity	
T1- Street addressing	Trade facilitation and logistics (3)
T2- E-commerce logistics	
T3- Implementation of the Trade Facilitation Agreement	
L1- Regulatory review and gap analysis	Legal and regulatory framework (3)
L2- New laws and regulation initiatives	
L3- Awareness and sensitization	
P1- Financial inclusion	Payment solutions (4)
P2- Interoperability of e-payments	
P3- Trust in online transactions	
P4- New e-payment options and innovations	
S1- Skills gap review	Skills development (5)
S2- Education and training	
S3- Digital innovation	
S4- Gender-related capacity building	
S5- Public sector capacity development	
F1- New financing opportunities	Access to financing (2)
F2- Finance for digital entrepreneurship	
	Total 26

*Not counted as implemented eT Ready recommendation; **Considered as eT Ready good practice and not as a policy recommendation*

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[17] It is important to mention that in the eT Ready monitoring questionnaire the question corresponding to this thematic item was presented in the 'ICT infrastructure and services' policy area. However, to remain fully consistent with the standard eT Ready methodology, this question was reintegrated into the policy area presented in the table.

The computation of the scored performance assessment as described in Box 1 is based on the number of eT Ready recommendations implemented, drawing on evidence available in the respective thematic policy items in the report and recorded in Annex 1. Therefore, figures presented in the seven policy chapters reflect the number of implemented recommendations by country and thematic item, which are derived by counting implemented recommendations as compiled in Annex 1. The assessment is binary: when country evidence is collected, the recommendation is marked as implemented. If there is no information on a specific thematic item reported in the questionnaire responses, it is assumed that no progress was made. The total number of possible points a country could reach is 26, equal to 100 per cent implementation rate.

Based on the analytical process described above – looking at countries' performance in the seven eTrade for all policy areas, eT Ready project priorities and implementation bottlenecks, lessons learned – it was possible to draw from the monitoring exercise recommendations for the way forward.

Phase 4 – Review and finalization

The report was made available by the eT Ready monitoring team for review in September 2020. The draft report was shared within and outside UNCTAD with country counterparts and eTrade for all partners, as well as development partners. Comments have been incorporated to complement evidence and check accuracy of information contained in the report. Editing, layout and soft-hard copy printing was done in October 2020 for public release and dissemination.

Box 1 The scored performance assessment

The scored performance assessment is calculated as follows:

The **number of implemented recommendations by country, α_y,** in each given policy area n, is calculated as follows:

$$\alpha(y) = X_{y,\,Strategy} + X_{y\,ICT} + X_{y\,Logistics} + X_{y\,Legal} + X_{y\,Payments} + X_{y\,Skills} + X_{y\,Financing}$$

The **total implementation rate by country, β_y,** in Fig. 2 is calculated as follows:

$$\beta_y = (\alpha_y/P)*100 = (\alpha_y/26)*100$$

The **number of recommendations implemented in a given policy area, β_n,** across all 13 countries, is calculated as follows:

$$\alpha_n = \sum_{y=1}^{Y} x_{yn}, \text{ that is } \sum_{y=1}^{13} x_{yn}$$

The **total implementation rate by policy area, β_n,** across all the 13 countries, is calculated as follows:

$$\beta_n = (\alpha_n/Max\,P_n)*100$$

The overall implementation rate (OIM) resulting from this monitoring exercise is calculated as follows:

$$OIM = (\sum_{y=1}^{Y} \alpha_y/Max\,P)*100, \text{ that is } (\sum_{y=1}^{13} \alpha_y/338)*100$$

That is, the sum of implemented recommendations by the 13 responding countries, divided by the maximum allowed number of eT Ready recommendations (338, that would equal to 100% overall implementation rate).

Given

x_y = recommendation x implemented by a respondent country y

Y = total number of countries that have submitted a monitoring questionnaire = 13

P = total number of thematic items

P_n = total number of thematic items in a given policy area n, where n = Strategy, ICT, Legal, Payments, Financing[18]

$$P = \sum P_n = P_{Strategy} + P_{ICT} + P_{Logistics} + P_{Legal} + P_{Payments} + P_{Skills} + P_{Financing} = 5 + 4 + 3 + 3 + 4 + 5 + 2 = 26$$

Where

X_{yn} = total number of recommendations x implemented by country y in a given policy area n;

$Max\,P_n = Y*P_n = 13*P_n$ is the maximum possible number of eT Ready recommendations in a given policy area n. If all responding countries had implemented all recommendations in the respective policy area thematic items, implementation rate in a given policy area would equal to 100%;

$Max\,P = Y*P = 13*26 = 338$ is the maximum possible number of eT Ready recommendations. That is, if all responding countries had implemented all recommendations across all policy areas' thematic items, overall implementation rate would equal to 100%.

Source: UNCTAD

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[18] See Table 1 for reference and full spelling of the policy areas, here abbreviated for ease of use.

E-COMMERCE READINESS AND STRATEGY FORMULATION

A growing consensus is emerging on the need to adopt e-commerce enhancing policies in the context of national development strategies and plans. All 13 responding countries, out of the 18 involved in this monitoring exercise, have confirmed that a national e-commerce strategy is either being implemented, finalized, in the pipeline or that they are actively looking for support for strategy development. In some cases, the process leading to the formulation of a national e-commerce strategy has been instrumental to fostering greater public-private cooperation and coordination. While interesting developments have been registered regarding the contribution of e-government in advancing countries' digital agenda, significant gaps remain in terms of availability of statistics on e-commerce transactions. The overall implementation rate combining all 13 countries' implemented recommendations in this policy area is 46 per cent.

Figure 4   Number of implemented recommendations by country and thematic item under policy area "E-commerce readiness and strategy formulation"

- ■ S1a- Strategy development (done or ongoing)
- ■ S2a- Policy coordination and dialogue (committees/working groups)
- ■ S2b- Policy coordination and dialogue (e-commerce associations)
- ■ S3- Availability of new e-government services
- ■ S4- E-commerce statistics availability
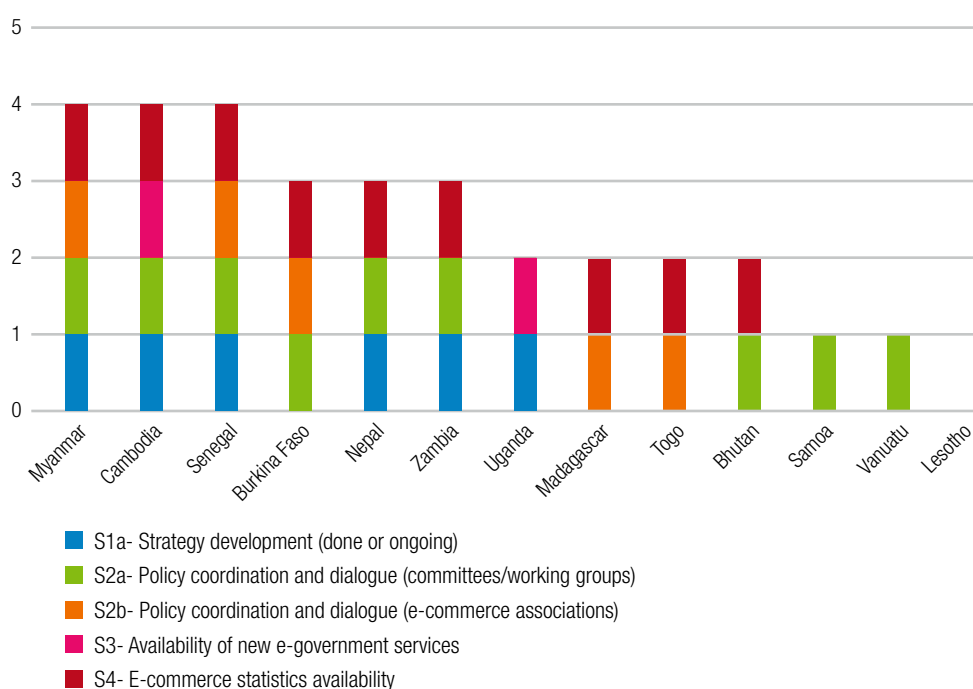
Source: UNCTAD[19]

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[19]   Please refer to Box N.1 for an explanation of the methodology used to calculate this value (i.e. total implementation rate by policy area, β_n) presented in the introductory paragraph in each of the seven policy chapters. The Figures presented after each introductory paragraph in each of the seven policy chapters are derived from data compiled in Annex 1.

S1- Strategy development

a. **Almost half of the countries are developing or have adopted national e-commerce strategies and the need for implementation is the next important challenge.** Nepal first, then Senegal and Cambodia have taken the lead and adopted their national e-commerce strategies, while Myanmar, Uganda and Zambia are in the process of developing their own strategy as recommended in their respective eTrade Readiness Assessments.

Countries that have adopted e-commerce strategies:

– **In Nepal, a national e-commerce strategy was triggered by the eT Ready Assessment.** The National Strategy on Development and Use of E-commerce in Nepal[20] was developed with government resources and approved in June 2019. Based on the strategy, the Government of Nepal has moved to implementation and is planning to take the necessary actions in the new programme and budget of the coming fiscal year.

– **In Senegal, a national e-commerce development strategy (SNDCES) was launched in December 2019** by H.E. Assome Aminata Diatta, Ministry of Trade and SMEs. The commitment of the Government of Senegal in tapping the potential of e-commerce is part of the country national digital economy policy, Stratégie Sénégal Numérique 2025, currently being reviewed and updated with support from the United Nations Development Programme. The SNDCES was funded by the Enhanced Integrated Framework (EIF).

– **In Cambodia, a national e-commerce strategy was adopted in July 2020 with the support of the EIF.** It revolves around five strategic objectives: 1. Enhance Business Environment, Regulatory Framework and Institutional Coordination, 2. Raise small and medium enterprise (SME) capabilities and improve venture capital coordination, 3. Enhance domestic and cross-border logistics, 4. Strengthen information and communication technology (ICT) infrastructure, financial inclusion and digital literacy in order for e-commerce to grow in the hinterland, and 5. Develop responsive skills-infrastructure for e-commerce. The e-commerce strategy is well integrated into the overall trade and development planning process. The Cambodia Trade Integration Strategy (CTIS) 2019-2023 contains chapters on e-commerce, ICT services and industry 4.0. In turn, readiness for digital economy and industrial revolution 4.0 is well established in the Royal Government of Cambodia's "Rectangular Strategy Phase IV – Building the Foundation Towards Realizing Cambodia Vision 2050" and National Strategic Development Plan 2019-2023.

Countries where a strategy is being prepared:

In Myanmar, Uganda and Zambia, strategies are at different stages of development. In Myanmar a National E-Commerce Strategy is being prepared with the technical support of UNCTAD, funded under the EIF Tier 2 Project titled "Myanmar – Services Trade Enhanced Project" (M-STEP). The strategy should be finalized by the end of 2020. Progress has been made in line with the roadmap of the Digital Economy Development Committee launched in May 2019 and the Myanmar Sustainable Development Plan (MSDP, Strategy 3.7). In Uganda, the elaboration of an e-commerce strategy is reported to be ongoing under the leadership of the Ministry of Trade, Industry and Cooperatives and support from the United Nations Development Programme (UNDP). Zambia is developing an e-commerce strategy with the involvement of a technical group comprised of key stakeholders within Government, such as Smart Zambia, Zambia Information and Communications Technology Authority (ZICTA), Ministry of Transport and Communication, research institutions and the private sector. A draft is undergoing wide stakeholder consultation in different provinces of the country, with a temporary suspension due to the COVID-19 crisis.

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[20] Available at https://moics.gov.np/public/uploads/shares/strategy/e-commerce.pdf (in Nepali).

b. More countries are eager to develop national e-commerce strategies.[21] Madagascar, Togo and Vanuatu are actively looking for development partners' support. Four additional countries have expressed interest in the development of a national e-commerce strategy.

Countries looking for development partners' support:

Madagascar, Togo and Vanuatu are actively engaged in partners' mobilization to secure support for the development of a national e-commerce strategy. In Madagascar, there have been discussions in the context of the World Bank project on digital governance (PRODIGY), as well as with the European Union (EU). In Togo, the development of a national electronic commerce strategy integrating a plan for the e-commerce penetration in the various economic sub-sectors has emerged as a top priority. To mobilize support, a first roundtable was held in October 2019 with an EU delegation, representatives from the Ministry of Trade, the Digital Economy Ministry and the EIF, which bodes well for securing support in the near future. The Republic of Korea has expressed interest in supporting Togo's e-commerce strategy through UNCTAD. Vanuatu requested UNCTAD assistance to develop an e-commerce strategy in 2018, right after the launch of the eT Ready.

Countries that have expressed interest during the monitoring exercise:

Four additional countries are ready to move into the starting block. These are Bhutan, Burkina Faso, Lesotho and Samoa, which consider an e-commerce strategy as a top priority in the monitoring survey conducted by UNCTAD. Bhutan, in particular, has made strides in this direction by adopting the eT Ready as a master guideline for e-commerce development. This, in turn, has informed the elaboration of the e-Commerce Policy, which is in final stage of formulation. The Government of Bhutan has indicated the need for an appropriate e-commerce implementation strategy including plans and programmes with possible funding opportunities. This will complement the development of e-commerce Policy Framework, which is already in progress.

S2- Policy coordination and dialogue

Policy coordination should be pursued, interministerial coordination should be strengthened and further expanded through public-private dialogue, as different mechanisms have been put in place to this effect. A review of the process underlying this monitoring exercise has revealed some persisting challenges pertaining to interministerial coordination and mobilization of line ministries and agencies by the ministries leading the e-commerce agenda. This was reflected in the difficulty, to varying degrees, of mobilizing resources and inputs for data collection to assess eT Ready implementation. On a more positive note, public-private collaboration is increasingly perceived as an effective enabler of e-commerce sector development. One of the values added by the eTrade Readiness Assessments has been to catalyze evidence-based policy dialogue and to enable constructive multi-stakeholder interactions.[22] This has translated into initiatives to establish multi-stakeholder e-commerce committees and working groups, as well as to the creation of new business federations dedicated to e-commerce economic operators. While not directly linked to policy recommendations emanating from the assessments, some good practices have also emerged regarding the need to properly manage the eT Ready process in the country. This has taken the form of dissemination of eT Ready findings and Action Matrix recommendations, as well as of an increasing awareness of the value of systematically monitoring eT Ready implementation.[23]

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[21] Sub. Para (b) has not been considered in the computation of the scored performance assessment as described in the methodology chapter of the report.

[22] See Policy Impact Notes, available at: https://etradeforall.org/development-solution/e-t-ready-rapid-e-trade-readiness-surveys-least-developed-countries-getting-started-e-commerce-development/?main-policy=e-commerce-assessments

[23] Sub. Para (c) and (d) have not been considered in the computation of the scored performance assessment as described in the methodology chapter of the report.

a. **Establishment of e-commerce committees/working groups to lead on the e-commerce development agenda.** In Myanmar, the Digital trade and e-commerce development subcommittee counts more than 10 members and has regularly met over the last year. In Nepal, an Inter-agency Coordination, Facilitation and Supervision Committee[24] was established after the release of the national e-commerce strategy. The first meeting was held in August 2019 while a second scheduled meeting was postponed due the restrictions imposed in response to the COVID-19 outbreak. In Senegal, interministerial and wider stakeholders dialogue is far along in the formulation process of the SNDCES, and on structures that were already operational at the time of the eT Ready formulation, such as the Working Group on e-commerce established in the context of Senegal's participation in e-commerce-related work at the World Trade Organization (WTO). On top of this, the long-awaited National Council for Digitalization has been set up and has managed to provide overall guidance on the development of the SNDCES. In Zambia, the Ministry of Commerce, Trade and Industry plans to make use of the consultative process on the e-commerce strategy development to constitute a structured committee/working group. In Samoa, an e-commerce committee was set up, but it has not been able to meet regularly.

In other countries, e-commerce committees/working groups are still in the formation process. In Cambodia, discussions are ongoing about revising the CTIS task force to make it an e-commerce specific one. In Burkina Faso, there are also renewed attempts to build on private sector initiatives. In Vanuatu, the current committee used to discuss e-commerce issues is the existing National Trade Development Committee (NTDC), which meets three times a year. Considering the size of Small Island Developing States public and private sectors, it could be wise to use existing structures to mainstream e-commerce policy discussions.

In countries with nascent e-commerce ecosystems, as it is the case of Bhutan, a call for support to bring more coherence in the current efforts for sector development was made clear as part of this monitoring exercise. Bhutan has indeed recognized that e-commerce sector development requires the involvement of various stakeholders ranging from government policymakers and regulators to the e-commerce players and consumers, and it has prioritized the need for a strategy for e-commerce ecosystem development as mentioned before. On top of this, the need for an "Institutional Development Project" has also been outlined. This stems from the consideration that e-commerce is at a nascent stage in Bhutan, with many parallel and uncoordinated initiatives, with a high risk of inefficient resource allocation and mismatch of initiatives among the different stakeholders. The envisaged project aims to bring together Government policymaking agencies, regulators and other relevant agencies, and target support for the establishment and empowerment of an ad hoc agency responsible for the development of e-commerce ecosystem in Bhutan.

b. **Establishment of new e-commerce associations.** In Myanmar, the E-Commerce Association of Myanmar was created in 2019 and is already up and running.[25] More than 30 members are actively engaged in its activities. In Togo, the National Council of e-Commerce Stakeholders is not yet operational; the process is ongoing to finalize the statutes to file at the constitutive statutory assembly. In Burkina Faso, an association of e-commerce stakeholders called "2aeB" was founded in 2019, although its focus has been on information sharing so far. In Madagascar, efforts are ongoing to set up a Board of e-Trade. The Senegalese Minister of Commerce launched the National Consortium for Electronic Commerce in June 2020. The Consortium is a grouping of e-commerce players whose goal is to drive inclusive e-commerce and promote the online sale of local products.

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[24] This committee comprises the members from different related Ministries, private sectors including the Joint Secretary from Office of the Prime-Minister and Ministers of Councils, Federation of Nepalese Chamber of Commerce and Industry, and Computer Association of Nepal.

[25] See https://www.eca.org.mm/

c. **Countries have built on the momentum created by the eT Ready process and ensured in-country dissemination and outreach, paving the way for greater awareness at the regional level.** The eT Ready Focal Points have ensured wider dissemination of soft and hard copies of their respective reports across the national public and private sector stakeholders who took part in the eT Ready consultations. Furthermore, eT Ready reports were launched at major events, as has been the case in several eCommerce Weeks organized by UNCTAD in Geneva and Nairobi. Building on this, countries have taken a voluntary approach in raising the visibility of eT Ready recommendations and in ensuring a proper follow-up. In Vanuatu, the eT Ready was officially launched at the National Agriculture Festival, in parallel with the launch of the Vanuatu Electronic Single Window System project. The event was organized by the Ministry of Agriculture and Ministry of Trade and brought together different government representatives, development partners, private sector stakeholders and the general public. The Ministry of Commerce of Myanmar and UNCTAD jointly launched the eTrade Readiness Assessment for Myanmar in Nay Pyi Taw on 30 October 2018. The eT Readies of Burkina Faso, Senegal and Togo were officially launched in Ouagadougou during the WAEMU-UNCTAD regional workshop organized in October 2018, which helped create the conditions for a more coordinated and strategic approach to e-commerce development at the regional level, as highlighted in Box 2.

Box 2   eT Readies support e-commerce regional integration in West Africa

The eT Ready work undertaken by UNCTAD in the West African region has been instrumental in raising the profile of e-commerce in the regional integration agenda of the Economic Community of West African States (ECOWAS) and West African Economic and Monetary Union (WAEMU). To date, eight ECOWAS countries have benefited from an eT Ready Assessment, namely Liberia (2018), plus the seven countries that are also part of the WAEMU - Senegal, Togo and Burkina Faso (2018), Mali, Benin, Niger et Côte d'Ivoire (2020).[26]

An UNCTAD report[27] taking stock of the findings of the seven evaluations conducted in the WAEMU region has outlined recommendations contributing to the development of a joint ECOWAS-WAEMU approach to prepare a regional e-commerce strategy. The report findings were presented at UNCTAD eWeek High-level Session "Enhancing e-commerce readiness in the ECOWAS region", in April 2020. The High-level Session highlighted the need for better policy coordination among regional economic communities to spearhead a regional e-commerce development agenda that builds on the diversity of e-commerce readiness across member countries. The UNCTAD report has recommended the development of a regional e-commerce strategy that will be centered on the need to strengthen essential infrastructures (electricity, e-commerce logistics, street addressing), advance ongoing critical digital economy development projects (ICT connectivity, e-government, legal reforms, payments' interoperability), as well as steer and monitor e-commerce sector development building on a regional e-commerce observatory. As a result of this process, the ECOWAS Commission has requested UNCTAD assistance to develop a regional e-commerce strategy.

Source: UNCTAD

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[26] Countries ordered in chronological order of their eT Ready Assessment, release dates are in brackets. Full reports available here https://unctad.org/en/Pages/Publications/E-Trade-Readiness-Assessment.aspx

[27] UNCTAD (2020), États membres de l'Union économique et monétaire ouest-africaine. Évaluation de l'état de preparation au commerce électronique, forthcoming.

Similar to the experience witnessed in West Africa, regional cooperation processes were triggered by UNCTAD in other regions. The eT Readies constituted an important first step for initiating coherent and coordinated e-commerce policy development in the Pacific at the request of the Permanent Representation of the Pacific Islands Forum in Geneva and with the support of the Pacific Islands Forum Secretariat (PIFS). In 2017-2018, UNCTAD prepared eT Ready Assessments for Samoa, Solomon Islands and Vanuatu, and for Kiribati and Tuvalu in 2019-2020. In addition, two non-LDCs – Niue and Tonga – have requested UNCTAD support. At the request of PIFS, other development partners have agreed to support assessments of Pacific non-LDC members based on UNCTAD's eT Ready methodology so as to guarantee comparability of results. At the end of a regional WTO/UNCTAD/PIFS workshop held in Fiji in 2017, government representatives discussed the development of a regional roadmap to support e-commerce strategies at national levels. As a follow-up, the PIFS submitted a proposal aimed at laying the foundations for an e-commerce regional strategy that will include a regional legal framework for e-commerce. Work is ongoing at PIFS on the development of this regional strategy, with support from UNCTAD and other development partners.

A similar dynamic was facilitated by UNCTAD in the Association of Southeast Asian Nations (ASEAN) region, where recommendations from eT Readies done in Cambodia, Lao PDR and Myanmar echoed in the ASEAN e-commerce agreement signed by ASEAN member states in November 2018, as noted later in this report. East Africa is also pushing for a regional action plan that could guide its member States towards e-commerce acceleration. Against this backdrop, the East African Community (EAC) Secretariat has initiated discussions with TradeMark East Africa, GIZ and UNCTAD to develop a regional e-commerce strategy - building, inter alia, on the eTrade Readiness Assessments conducted in Uganda and Tanzania. A steering committee is expected to be set up in 2020 to guide the strategy development process.

d. **Countries are considering establishment of e-commerce development monitoring mechanisms building on the eT Ready Action Matrix.** In countries that have moved towards the implementation of national e-commerce strategies, such as Cambodia, Myanmar, Nepal and Senegal, there is increasing awareness of the value of ensuring a proper monitoring of eT Ready recommendations within their respective ministries in charge of trade. In Zambia, the e-commerce strategy is being developed including an implementation framework with responsible institutions as part of the development process. This should lead to a proper mechanism for tracking implementation. In Samoa, the E-Commerce Committee should also be tasked with this function. In Vanuatu, eT Ready recommendations are being included in the new Trade Policy Framework Update (TPFU) and will be subject to the work of the NTDC in charge of monitoring the implementation of the TPFU. In Burkina Faso and Togo, discussions are ongoing to set up a monitoring and evaluation framework to measure the progress made in implementing eT Ready recommendations.

Greater public-private cooperation has come to the forefront of policy discussions during the COVID-19 crisis. E-commerce entrepreneurs interviewed by UNCTAD have expressed interest in a more proactive involvement of e-commerce businesses in defining recovery measures aimed at building a better enabling environment for the COVID-19 economic recovery. In countries like Cambodia, Myanmar, Senegal and Uganda, the e-commerce sector has been considered as part of the solution to the crisis, tapping into the potential of public-private cooperation, as noted in Box 3.

Box 3   The COVID-19 impact on e-commerce and good practices in selected LDCs

Since the outbreak of the COVID-19 pandemic, UNCTAD has been closely monitoring and leading discussions about the effects of the pandemic on e-commerce and digital ecosystems in developing countries, and LDCs in particular. Such discussions have prominently set the stage of UNCTAD eWeek, featuring a set of 14 webinars during a virtual eWeek that replaced the traditional eCommerce Week and enabled a global dialogue involving 2,000 participants from more than 130 countries.[28] In a nutshell, the role of digital technologies during the COVID-19 crisis has been critical for both medical and non-medical uses. Notably, across the world, the pandemic has seen people turning increasingly to e-commerce platforms for ordering goods and services – albeit from very different levels of e-commerce uptake. Online sales have exploded for all sorts of goods, especially essential ones, including in developing countries and LDCs. However, gains have not been spread across the whole e-commerce ecosystem; for instance platforms dedicated to tourist accommodation or transportation suffered heavy losses. The magnitude of crisis response measures to mitigate the economic consequence of the crisis has also been uneven, ranging from measures to reduce cost of mobile Internet connections and e-payments transactions, up to public-private sector cooperation initiatives to onboard new e-commerce operators and reach underserved households. Some good practices have emerged in dealing with the COVID-19 crisis. In Cambodia, digital startups have helped blunt economic impact of COVID-19, and online grocery shops have experienced three-digit growth during lockdown. Supply chains have had to adapt to a sudden shift in quantities ordered under very strict hygiene measures, creating confusion in the first months, followed by an impressive capacity to re-organize the flow of goods, for the most part. In Myanmar, e-commerce and the digital economy are featured in the COVID-19 Economic Relief Plan. In Senegal, the Trade Ministry fast-tracked measures to ease access to essential goods and services during the pandemic. In Uganda, e-commerce platforms have been fast to promote contact-less payments and logistics and nurture new partnerships powering recovery from COVID-19 crisis. Building on these countries' cases studies, UNCTAD launched a survey in July 2020 to better understand impact of COVID-19 on digital entrepreneurs and e-commerce platforms in 23 developing countries and LDCs,[29] to assess their reality amidst this pandemic and beyond, in order to identify and implement adequate policy responses to sustain more inclusive development in the mid- and long-term.

Source: UNCTAD

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[28]   A summary of discussions of the UNCTAD eWeek can be found here: https://etradeforall.org/app/
        uploads/2020/05/eWeek2020finalsummaryreportFINALVERSION-4.pdf

[29]   See UNCTAD (2020), COVID19 and e-commerce. Impact on businesses and policy responses, forthcoming.
        Countries covered by the survey (all but three are LDCs) are: 1) in Africa: Benin, Burkina Faso, Cote d'Ivoire
        (Non-LDC), Madagascar, Mali, Niger, Rwanda, Senegal, Tanzania, Togo, Tunisia (Non-LDC), Uganda, Zambia;
        2) in Asia: Bangladesh, Bhutan, Cambodia, Lao PDR, Myanmar, Nepal; 3) in the Pacific : Kiribati, Samoa (Non-
        LDC), Tuvalu, Vanuatu.

S3- Availability of new e-government services

The deployment of e-government services remains high on the digital transformation agenda. Burkina Faso has initiated, in tandem with the World Bank and piloted by the National Agency for the Promotion of New Information and Communication Technologies, its e-government implementation project entitled e-Burkina. The project is on track and will contribute to the administration's ability to offer online services to citizens, to digitize certain procedures and to support digital entrepreneurship. Seven e-government services platforms have already been created.[30] Madagascar, with the support of the World Bank, has supported the Malagasy Digital Governance and Identity Management Project (PRODIGY). In order to monitor the implementation of the digitization programme of government services, the e-Government Madagascar platform launched in 2020, to facilitate sharing updated information on the progress of the various digital projects. The General Tax Department introduced a portal for the electronic declaration of taxes on the Internet called e-HETRA in 2019. Launched in March 2020, the mobile payment service allows taxpayers to pay their taxes online as a result of a collaboration with M'Vola, Orange Money and Airtel Money.[31]

Togo, Zambia and Myanmar aim to reap the benefits of e-government by providing their citizens with a public platform for the issuance of documents, permits, authorizations and forms from public authorities in most administrative departments. The Government website for public services is already very well established in Togo. The Guichet Unique of Public Administration brings together all the digitized services of the administration, guaranteeing a reduction in registration costs and increasing security around the delivery of certificates. Agri-PME, the electronic wallet for farmers, aims to reach four million vulnerable farmers by 2030, which shows the ambition of public authorities in asserting their leadership through e-government services. In Zambia, the ZamService website functions as a government directory for e-services. A portal that brings together most digitalized public services, such as Patents and Company Registration Authority authorization procedures, the application, processing and issuing of immigration visas and the application, processing and access to road tax and vehicle inspection certificates. In addition to these government initiatives, a payment gateway to process online payments for government services has been integrated with the online service offer. A Myanmar national e-government portal was launched in September 2018, combining websites and e-services posted from each Myanmar government entity to provide better services to the population through a single window. In addition, the MyanmarSat-2 satellite system has been in use since October 2019 to support e-government services nationwide by reaching isolated territories.

Similarly, Bhutan, Cambodia, Nepal and Senegal have progressed in making new e-government services available. In Senegal, a new service called "e-solde" was made available in 2019 to public administration employees to access their payslips online. In Cambodia, different ministries are responsible for a number of e-services ranging from company registration, certificate of origin, trademark registration, up to the Cambodia National Single Window, vehicle registration platform and e-visa for foreign visitors entering the country. In Nepal, several e-services are now available for procurement bidding, online payment of utility bills, customs procedures including payment of service fees, as well as other applications for fiscal compliance. Bhutan has also reported that many citizen-centric services are made available online to enhance public service delivery - ranging from online business licensing and customs-trade approval, up to the deployment of an electronic patient information system and a centralized health data warehouse, the latter made possible thanks to regional cooperation between the World Health Organization and the Indian Institute of Health.[32] These developments are indeed consistent with the findings of the 2020 United Nations E-Government Survey, which highlights how among the LDCs, Bangladesh, Bhutan, Cambodia,

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[30] See http://www.eburkina.gov.bf/index.php/actualites/117-resume-executif-du-rapport-d-evaluation-a-mi-parcourt-du-projet-e-burkina

[31] See http://www.midi-madagasikara.mg/economie/2020/03/17/dgi-lancement-de-e-hetraphone/

[32] See box 1.1, page 22: https://publicadministration.un.org/egovkb/Portals/egovkb/Documents/un/2020-Survey/2020%20UN%20E-Government%20Survey%20(Full%20Report).pdf

Nepal and Rwanda feature as the highest performers. Through digital government development, Bangladesh, Bhutan and Cambodia moved from the middle to the high E-Government Development Index group in 2020.[33]

S4- E-commerce statistics availability

No significant improvements regarding the availability of data on e-commerce transactions and market trends. While it is true that the monitoring exercise has not highlighted significant progress in this area, there a few countries that have prioritized projects in this area to climb the ladder. In Uganda, National Information Technology Authority (NITA-U) is in final stages in implementing a Systems Integration Platform to facilitate data sharing between Government IT systems in Uganda. Among other things, this initiative will help to harmonize ICT and e-Commerce Statistics. Furthermore, e-commerce services are increasingly integrated into the bi-annual National ICT Survey, with the next one scheduled for 2020. Data related to availability, access, awareness, attitude and usage of e-commerce by government organizations, enterprises, households and individuals will be collected. This goes into the direction of having a products and enterprises statistical database, as advised by the Uganda Ministry of Industry, Trade and Cooperatives in the context of this monitoring exercise. In Cambodia, the Ministry of Economy and Finance and the National Bank of Cambodia record domestic and cross-border e-commerce statistics using data on digital payments.

The Government of Senegal indicated the need to launch a study on the use of ICT and broaden the definition of indicators to have key data on electronic commerce and is pursuing the establishment of a Digital Trade Observatory.

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[33]   See https://www.un.org/development/desa/publications/publication/2020-united-nations-e-government-survey

ICT INFRASTRUCTURE AND SERVICES

The development of e-commerce is intricately dependent on the quality of ICT infrastructure and related services. Private and public sector have undertaken initiatives in recent years to ensure affordable and reliable access to ICT. These initiatives are particularly needed in LDCs, where fewer than one out five people use the Internet, compared to almost nine out of 10 in developed countries, per ITU estimates. The digital divide is even more exacerbated by significant urban/rural disparities in access and a widening gender gap in Internet access and use. The eT Ready recommendations implemented by countries are in line with global efforts towards meeting SDG target 9c to "significantly increase access to ICT and strive to provide universal and affordable access to Internet in the LDCs by 2020". Most of the countries evaluated by the eT Ready programme have placed the need to connect their territories at the forefront of their development policies through major investments in ICT infrastructure, measures to foster mobile Internet connectivity and affordability, as well as improved access to electricity (see Figure 5). The overall implementation rate combining all 13 countries' implemented recommendations in this policy area is 54 per cent.

Figure 5   Number of implemented recommendations by country and thematic item under policy area "ICT infrastructure and services"
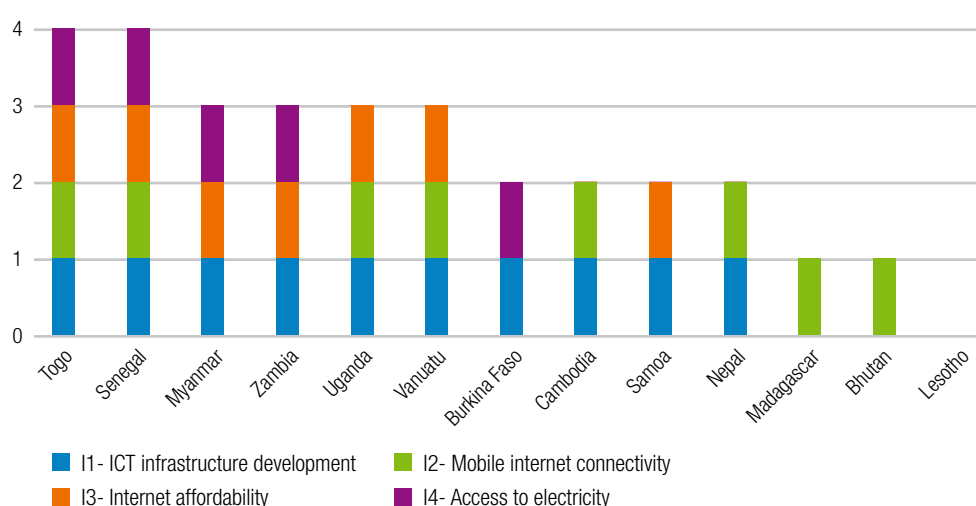
Source: UNCTAD

I1- ICT infrastructure development

ICT infrastructure deployment in the countries under review continues to be a priority to foster greater digital inclusion. The eT Readies have consistently recommended increased investments in key ICT infrastructure to reduce the gaps in Internet access between urban centers and rural areas, and in turn to create an enabling environment for e-commerce.

The creation of a digital backbone in Myanmar through the installation of key infrastructure is mentioned as a priority in the country's Sustainable Development Plan (MSDP Strategy 3.6). Meanwhile, the country remains a major player in the region in terms of satellite Internet coverage with the launch in August 2019 of its second owned satellite, MyanmarSat-2. This space project will provide better coverage (95 per cent) of its people and will offer communication services 8 to 10 times faster than its precursor, MyanmarSat-1. Building on these infrastructure endowment achievements, Myanmar has expressed interest in mobilizing support for an ICT Infrastructure and Services Development Project based on a public-private partnership (PPP) commercial

model. Vanuatu is also taking advantage of satellite technology: it has launched the KACIFIC-1 in December 2019, a throughput satellite providing high-speed broadband Internet for South East Asia and Pacific Islands region, through streaming beams over Pacific archipelagos.

Zambia is continuing its infrastructural development with the erection of communication towers across the country, which would raise mobile networks' coverage rate to 92 per cent of the population by the last quarter of 2020. Back-to-back with this project, collaboration between the private and public sectors led to the creation of a major optic fibre network, with more than 13,000 km of cable and a presence in all 10 regions. Uganda has renewed its commitment to digital transformation in its latest National Development Plan III under Vision 2040, which encourages reliable and affordable access to digital services in collaboration with the private sector by increasing penetration of ICT equipment, services and applications. Through two separate projects, i.e., "Missing Links" and "Last Mile", being implemented under the World Bank-funded Regional Communication Infrastructure Program, NITA-U has extended connectivity to under-served areas of West Nile and border points of Mpondwe, Vurra and Oraba, with over 1,000 more sites expected to be connected to the National Backbone Infrastructure. In Nepal, the Digital Nepal Framework identifies eighty digital initiatives under eight critical sectors within which it identifies ICT as enabler, namely digital foundation, agriculture, health, education, energy, tourism, finance and urban infrastructure. As it was launched in 2019 with a vision of "digital based social economic prosperity", it is yet to be seen how the framework will be translated into new significant infrastructure investments. Through the Optical Backbone Network and Broadband Network Access projects, various works of connecting broadband network for the educational institutions and health institutions all over Nepal are at different stages of completion. Processes have begun and are at various stages in various districts, for purchase of services for optical fibre laying, equipment and router, survey and planning among others.

Samoa successfully connected to the Manatua – One Polynesia Cable in January 2020. It is expected to be fully operational by the end of 2020 to finally connect the islands of French Polynesia, Cook Islands, Niue and Samoa to the Southern Cross Cable in Fiji. This new optical fibre submarine cable now spans the South Pacific and will transform speed, capacity, resilience and affordability to all Pacific Islands region.

Burkina Faso, Cambodia, Senegal and Togo are committed to using Universal Service Funds (USF) in order to ensure its public service mission and avoid the exclusion of certain categories of users or economically unprofitable remote geographical areas. Governments collect parts of the revenues generated by private network operators in order to finance the installation of communication infrastructure in the most remote areas. In Myanmar, the Universal Service Strategy (2018-2022) was also developed, aiming to provide more equitable and inclusive access to communications infrastructure across all regions by using market-oriented mechanisms to achieve universal service. In Vanuatu, the implementation of the Universal Access Policy for new telecommunications infrastructure and upgrades of related services has been extended to January 2022 by the Telecommunication Radiocommunication and Broadcasting Regulator. Uganda has tapped its USF to provide Internet access in almost all public high schools. However, more needs to be done across LDCs and Small Island Developing States to ensure that USFs are efficiently used to boost connectivity and bridge digital divides, as recommended by the International Telecommunication Union (ITU).[34]

I2- Mobile Internet connectivity

High mobile penetration sustains investments to expand coverage towards universal mobile broadband access (3G/4G/LTE/5G). eT Readies have all captured the importance of mobile phones penetration, particularly in LDCs, as an effective driver to increase Internet connectivity. Recent ITU data,[35] aggregated by regions and levels of development show that

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[34] See https://www.itu.int/dms_pub/itu-d/opb/ldc/D-LDC-ICTLDC-2018-SUM-PDF-E.pdf

[35] See https://www.itu.int/en/ITU-D/Statistics/Documents/facts/FactsFigures2019.pdf

the gap remains significant between mobile-cellular subscriptions and active mobile-broadband subscriptions. As Figure 6 shows, this gap is reflected in the rate of Internet use, where fewer than one out five people (19 per cent) access the Internet in LDCs, compared to almost nine out of ten (87 per cent) in developed countries. Digital divides are even more exacerbated by significant urban/rural disparities in access and a widening gender gap in Internet access and use. Only 40 per cent of the population is covered by high-speed mobile network in LDCs. In Africa, where the coverage is close to the LDCs average with 38 per cent, coverage is particularly concentrated in main urban areas. The gender gap in Internet use is also significant in both developing countries and LDCs. The gap has been widening the most in LDCs over the last six years (2013-2019) from 30 to 43 per cent.[36]

Figure 6   Selected Internet connectivity indicators in 2019*
(Percentage)
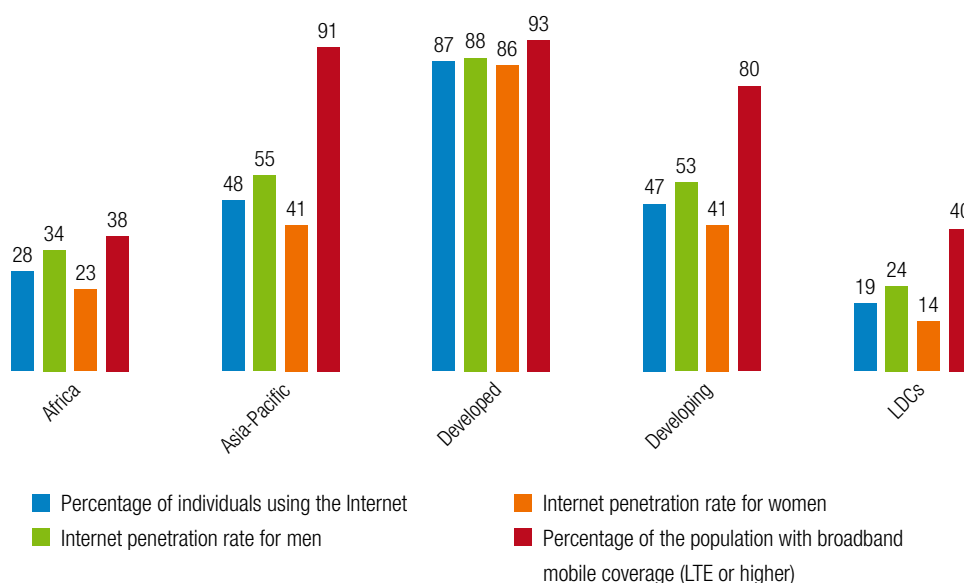
Source: ITU (*2019 estimates)

The adoption of newer communications technology is a challenge that most countries under review are eager to accept. Building on the recommendations of the eT Ready, they have increasingly realized that a reliable and fast mobile broadband connectivity is a key component for expanding e-commerce. Accordingly, they are actively pursuing supportive policies and investments to increase mobile broadband connectivity, building on the high penetration rate of mobile phones.

Madagascar is ahead of the technological transition underway on the continent. In June 2019, the authorities, through the Ministry of Posts, Telecommunications and Digital Development, enforced a ban on importing and marketing new 2G phones in favor of more modern 3G and 4G devices. This measure will ensure better cybersecurity while promoting the adoption of new digital services such as mobile banking and the use of cashless payments.

Uganda and Vanuatu are actively modernizing their communications tower fleet to transform the existing 2G grid into a broader and more reliable 3G coverage, enabling economic players to benefit from digital services offered by broadband connectivity. By 2019, Uganda had deployed twenty-two 3G base stations, which aligns with the 3rd Rural Communications Development Fund Policy. The installation is expected to reduce costs by 10 per cent while ensuring 50 to 100 per cent penetration of broadband accessibility. Vanuatu, under its Universal Access Policy to foster

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[36]   See https://www.itu.int/en/ITU-D/Statistics/Documents/facts/FactsFigures2019.pdf

Internet services, is seeking to connect 98 per cent of its population through the upgrading of all its sites to support 3G services and cater to future LTE services.

In Zambia in Q1 2020, 32.5 per cent of all telecommunications sites countrywide were 3G sites and 27.5 per cent were 4G/LTE sites. In Cambodia, the number of mobile network operators has reached six (such as SMART, MetFone, Cellcard, and other small operators) with 83.9 and 57.5 per cent of the population covered by 3G and 4G networks respectively. Similar improvements were also recorded in Nepal where all 77 districts have either a 3G or 4G coverage. This allowed the expansion of broadband connectivity to more than 57.45% of community schools, community hospitals and ward offices countrywide, the establishment of fully equipped IT Labs in 1,000 community schools, 100 community IT centers for the purpose of adult digital literacy and of smart schools in each of the seven provinces, equipped with smartboards, desktops, laptops, digital contents, projectors and high speed connectivity. Thirty-six E-village Centers have been established by the Nepal Department of Information Technology. This means access to information technology at the rural level by the development, extension and promotion of areas including public services (e-service), education, health, agriculture, tourism, and local development.

Bhutan is witnessing significant growth in data traffic; Ericsson is helping Bhutan Telecom address this growing demand for data services by expanding the LTE coverage and capacity in the country. In Senegal, the "Sénégal Numerique 2025" project found new impetus after the publication of the National Broadband Plan in June 2018. The project aims to promote and coordinate the deployment of quality infrastructure, access and affordability of broadband services and applications for everyone throughout Senegal. Since October 2018, all of the country's regional capitals and most populous cities have been fully connected to broadband mobile Internet.

In Togo, after the privatization of the public operator Togocom by the AXIAM group, investment efforts in telecommunications infrastructure have been significant. Between 2019 and 2020, no fewer than 140 new 2G and 3G+ sites were created. Thus, a massive additional seven years investment plan of 245 million euros confirms the operator's determination to accelerate the digital transformation and to offer quality digital services that match a national ambition of creating financial inclusion and technology solutions for businesses.

On top of these initiatives, plans to roll out 5G networks in the urban areas of major regional capitals are increasingly adopted in several countries, as described in Box 4. This should pave the way to further inclusion of public players, as well as industry and trade actors in the digital economy, and facilitate the introduction of innovative digital services.

Lesotho has expressed interest in mobilizing support to bridge the digital divide with rural areas through expanding 4G accessibility and affordability.

I3- Internet affordability

Internet affordability remains a challenge, especially in Africa, despite reforms and investments to push prices down. The cost of access to digital services as well as free competition on telecommunication markets are central elements in the development of e-commerce and the reduction of the digital divide. Tariff reductions enable operators to increase the number of subscribers and users of their services and to provide better coverage of the territory. Figure 7 provides an overview of the cost of Internet data bundles in the countries reviewed, based on Q2 2019 data. The price of access to Internet remains still very high in Africa and to a certain extent in the Pacific. In Burkina Faso, Liberia, Madagascar, Togo and Nepal, the price of 5GB Internet data packages can cost as much as 20 per cent or more of average income, as shown in Figure 7.

Box 4   New operating licenses granted to pilot and deploy 5G networks

A number of LDCs are already rolling out plans to enable 5G networks, including Madagascar, Senegal, Togo, Uganda, Cambodia and Nepal. In Madagascar, the country's telecom leader, Telma, turned to Swedish 5G provider Ericsson, signing a $100 million agreement to upgrade the network and move towards 5G. In Senegal, Orange/Sonatel plans to test the implementation of 5G in cooperation with the country telecom regulator in Dakar. In Uganda, telecom operator MTN launched a public demonstration of 5G, becoming the first operator in East Africa to conduct a 5G trial. The country is poised to adopt this important technology in partnership with Chinese multinational telecommunications equipment and systems company ZTE. In Cambodia, the three major mobile network operators are installing and piloting 5G technology, strongly backed by the Ministry of Post and Telecommunications. Bhutan's regulator has set out its roadmap towards 5G adoption, with deployments expected to begin in 2022. Plans for piloting 5G network in four major cities of Nepal have been scheduled. As recommended by ITU and United Nations Office of the High Representative for the Least Developed Countries (UN-OHRLLS), first it is important for regulators to create the right regulatory environment and incentives that will allow operators to launch the latest generation of high speed mobile broadband networks, including by making the necessary spectrum available. Second, it is important to take advantage of technological advances and innovations that allow adaptation of and improvements to existing networks,[37] while at the same time continuing to invest in wired infrastructure, both in terms of national backbone and international connectivity.

Source: UNCTAD

Figure 7   Price of Internet data packages as percentage of average income, 2019
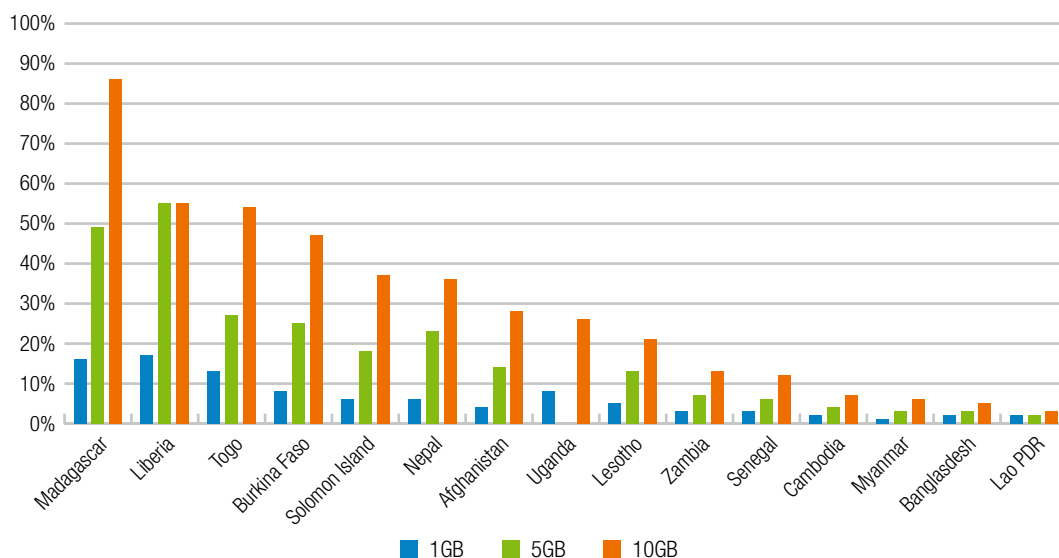
Source: Alliance for Affordable Internet[38]

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[37]   https://www.itu.int/dms_pub/itu-d/opb/ldc/D-LDC-ICTLDC-2018-SUM-PDF-E.pdf

[38]   See https://a4ai.org/extra/mobile_broadband_pricing_gnicm-2019Q2

A few countries have taken concrete steps towards lowering of Internet rates. The arrival of Free on the Senegalese market in October 2019 has prompted other operators to propose more competitive offers, reducing prices by up to 90 per cent on the initial cost of mobile Internet packages.[39]

In Togo, prices charged are still very high compared to the rest of the West African Economic and Monetary Union (WAEMU) countries, with the cost of one GB representing 13 per cent of the average monthly income of an inhabitant.[40] Over the past two years, the Government has made efforts to cap Internet prices within the WAEMU average and is progressing towards opening the Togolese telecommunications market to foreign investors.[41]

In Zambia, the Government progresses in making ICT access affordable through regulatory interventions and monitoring market performance. For example, all operators reduced their overall tariffs in early June 2019 to a maximum of ZMW 1 based on the findings of the Cost of Service Study. In Uganda, strategic initiatives undertaken by NITA-U, such as the National Backbone Infrastructure that offer bulk bandwidth at low prices as well as MyUG that offers free Wi-Fi, are increasing the appetite for Internet use while making bandwidth more affordable to a growing number of government agencies and ordinary citizens. These new services in data storage, thanks to new investment in data centers, can increase competition between commercial ICT service providers and continue to drive down prices.[42]

The recent laying of high-bandwidth submarine cables in the Pacific Island States, such as the Interchange Cable Network 2 (ICN2) connecting Vanuatu to the Solomon Islands, and the advent of competition in Samoa's mobile phone market have simultaneously contributed to decreasing prices. Vanuatu's Radiocommunications and Broadcasting Regulator is currently seeking to review the affordability of telecommunications services, as outlined in their 2020 Annual Work Plan. In Samoa, tariffs declined by about 50 per cent since 2006 and network coverage has increased to over 90 per cent of the population.[43]

The reduction in Internet access tariffs by mobile operators in Myanmar came into effect in March 2020, as did the reduction in electricity prices, motivated by the outbreak of the COVID-19 pandemic. One of the factors behind the decline in broadband prices is the entry of new telecom operators into the domestic broadband market to compete directly with existing Internet service providers.

As shown by the latest The State of Broadband 2020 report, greater affordability alone does not result in increased access. Indeed, while price levels for mobile-voice, mobile-broadband and fixed-broadband services have been on the decline and have become increasingly affordable over the past decade, and though the declines are even more dramatic when measured relative to incomes, these trends do not directly lead to rapid increases in Internet penetration. This suggests that other issues pose significant barriers to Internet adoption.[44] For example, as shown in Figure 7, Internet price is relatively low in Lao PDR but the country is lagging significantly in terms of accessibility, quality and affordability of Internet services compared to other comparable regional economies.[45] Initiatives undertaken by the reviewed countries implementing eT Ready recommendations could inspire reforms in other developing countries and LDCs for affordable and inclusive connectivity.

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[39]   See https://www.jeuneafrique.com/874928/economie/senegal-les-prix-de-la-telephonie-mobile-ont-significativement-baisse-depuis-larrivee-de-free/

[40]   See https://a4ai.org/extra/mobile_broadband_pricing_gnicm-2019Q2

[41]   See https://www.agenceecofin.com/investissement/0711-70878-des-investisseurs-internationaux-de-premier-plan-au-capital-de-togocom

[42]   See https://africanbusinessmagazine.com/sectors/technology/uganda-gets-internet-boost-with-new-data-centre/

[43]   See https://www.budde.com.au/Research/Samoa-Telecoms-Mobile-and-Broadband-Statistics-and-Analyses

[44]   See https://www.itu.int/dms_pub/itu-s/opb/pol/S-POL-BROADBAND.21-2020-PDF-E.pdf

[45]   See http://documents1.worldbank.org/curated/en/336311549033138864/pdf/Digital-Connectivity-in-Lao-PDR-Lagging-Behind-Peers-A-Short-Assessment-with-Policy-Recommendations-to-Catch-Up.pdf

I4- Access to electricity

Efforts are ongoing to improve access to electricity, but there are still significant urban-rural divides and regional disparities, particularly across LDCs. Countries are significantly investing to improve electricity access. In Myanmar, the second phase of the National Electrification Project, valued at $122.8 million, aims to electrify about 4,000 villages, comprised of 457,588 households within five miles of the national grid. In Burkina Faso, different projects are being implemented, tapping into major infrastructural achievements, such as the inauguration of the Ghana-Burkina Faso interconnection at the end of 2018. In Togo, the "lighting the fire" presidential initiative ("CIZO" in local Mina language) has attracted new private partners for implementation.[46] The initiative aims to increase access to electricity in rural areas. It consists of making individual solar kits available to the population, operating on the principle of payment on consumption thanks to a split payment platform. In Zambia, the Government revised its national energy policy in 2019 to facilitate more open access regimes to increase private sector participation, promote alternative sources of energy and cost reflective tariffs in the pricing of energy services. In Cambodia, the Government announced in February 2020 a $50 million package to reduce electricity cost for the agriculture and manufacturing sectors.

In Senegal, the rate of access to electricity was 67 per cent in rural areas and over 92 per cent in urban areas in 2018. Thanks to government projects and initiatives, this rate is progressively improving. The energy mix now makes it possible to reduce the gap in rural areas. In the field of renewable energies, the country proceeded with the construction of four photovoltaic plants between 2017 and 2018. A wind farm was inaugurated in December 2019 in Taïba Ndiaye, with a capacity of 40 megawatts. The park is made up of 16 wind turbines 117 meters high but should evolve into a total of 46 wind turbines, with a power of 150 megawatts. In addition, the second compact of the Millennium Challenge Corporation, signed on 10 December 2018 between the Senegalese and American governments, whose funding is estimated at 600 billion dollars, aims at broad and reliable access to energy

Investments take time to translate into tangible outcomes in terms of better access to electricity, and more efforts are needed. Overall, almost all of the countries reviewed in this report have made steady progress in terms of electricity access for the population over the last four years for which data are available, as shown in Figure 8. Four countries have reached, or are very close to, ensuring universal access to electricity, namely Afghanistan, Bhutan, Lao PDR and Samoa, and Nepal Electricity Authority has plans to achieve 100 per cent electricity access by 2023. LDCs still face major disparities in energy access between urban and rural populations and regional disparities remain important. For example, Asia-Pacific LDCs are faring better with an electrification rate of 86.2 per cent compared to 33.2 per cent in African LDCs.[47]

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[46]   See https://www.afrik21.africa/en/togo-fenix-solergie-and-moon-join-cizo-project-to-electrify-villages/

[47]   See http://unohrlls.org/news/urgent-action-needed-to-scale-up-energy-access-in-worlds-poorest-countries/

Figure 8   Access to electricity as percentage of the population in the countries under review
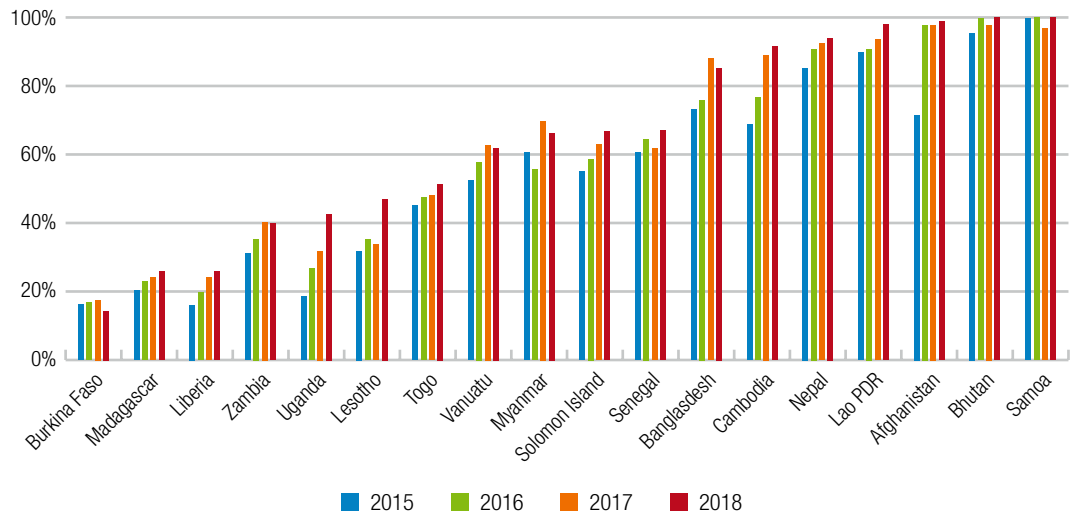
Source: World Bank, Sustainable Energy for All (SE4ALL) database

TRADE FACILITATION AND LOGISTICS

In terms of logistics, last-mile delivery continues to pose a challenge for e-commerce development. The eT Readies have shown how physical address systems in general remain underdeveloped, particularly outside main urban areas, while the time and cost of deliveries in remote areas remain unattractive to sustain e-commerce growth. Efforts have been undertaken in parallel with several initiatives, from both the public and private sectors, to improve the e-commerce logistics services and supply chain infrastructure. One example of such initiatives has been the ambitious project to establish and extend reliable addressing systems in which many countries assessed are now involved. Nevertheless, to facilitate cross-border e-commerce greater impetus is needed to spearhead implementation of the Trade Facilitation Agreement, a recognized enabler for e-commerce development (see Figure 9). The overall implementation rate combining all 13 countries' implemented recommendations in this policy area is 51 per cent.

Figure 9   Number of implemented recommendations by country and thematic item under policy area "Trade facilitation and logistics"
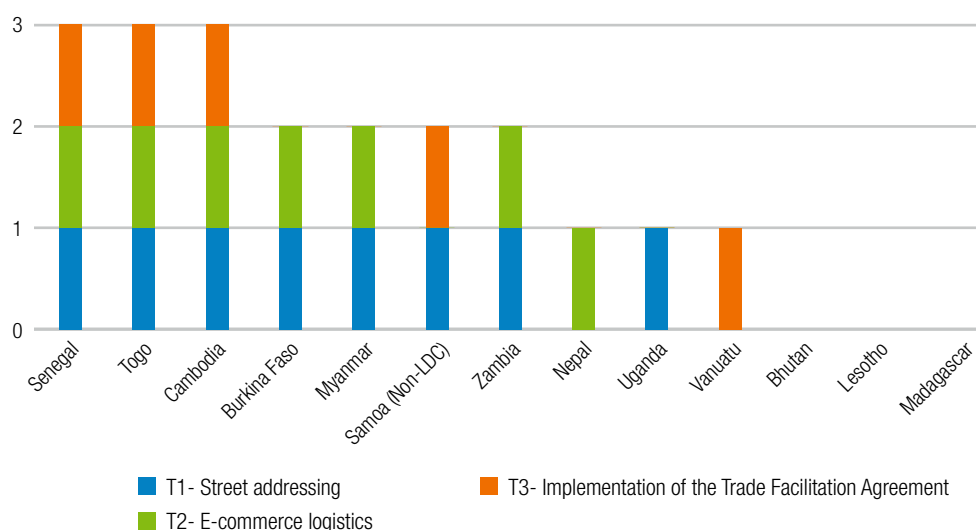
Source: UNCTAD

T1- Street addressing

The deployment of national addressing projects continues; digital solutions are increasingly part of the last-mile delivery infrastructure. In Burkina Faso, the National Addressing Plan was presented in January 2020, aiming at complementing the addressing operations carried out in the cities of Ouagadougou and Bobo-Dioulasso, and at extending this initially to the thirteen regional capitals, second to other urban municipalities and finally to rural municipalities.[48] In Senegal such a plan already exists, with notable improvements in Dakar where more than 224,000 buildings were geo-localized in 2019. The same efforts will be extended to thirteen other regions.[49] In Togo, the project to name streets in Lomé neighborhoods has found new impetus over the past two years, while at the same time discussions were launched in 2019 by Togo's Post company (SPT) and Government authorities to complement addressing efforts with grid-based coding technology.

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[48]   See https://lefaso.net/spip.php?article94555

[49]   See http://www.osiris.sn/Systeme-d-adressage-224000.html

In Uganda, the Kampala Capital City Authority has started issuing addresses to households and the Government updated its National Postcode and Addressing Policy in 2019 to extend reach beyond the capital. The installation of street and residential addressing infrastructure has been piloted in selected parts of Zambia. Support to roll out the national addressing system countrywide has emerged as a top priority in the context of this monitoring exercise. The benefits of supporting such an initiative led by ZICTA range from easing e-commerce transactions, improving quality of service and delivery success, to potential for developing untapped revenue streams and increasing efficiency from automated mail and parcel processing. The development of a physical addressing system has also been indicated by Nepal as a priority project for which support is needed.

In Cambodia, the Go4eCam project was launched in January 2020, funded by the EIF and implemented by the Ministry of Commerce.[50] Among other things, it is geared toward providing support to Cambodia Post to strengthen its operational readiness for e-commerce, with assistance from the Universal Postal Union (UPU). In Myanmar, concrete steps have been undertaken by Myanmar Post to i) apply the UPU S42 addressing standard format for overall public use, and ii) roll out postal digital services, such as the trace and track application, in collaboration with private logistics companies. In Samoa, a taskforce of 12 ministries was set-up to coordinate the "Street and Residential Address Naming Project". The project will use GPS-based technology to advance the identification of locations in Samoa in geo-localization applications (e.g. Google Map), and will run in phases, starting with the capital Apia city center. Further need for support in postal system development through national street addressing has been expressed by Samoa in the context of this monitoring exercise.

T2- E-commerce logistics

Structuring the logistics infrastructure still requires more attention and greater public-private collaborative efforts, including with the Posts to spur e-commerce friendly innovations. Overall, significant reforms and initiatives to improve the logistics infrastructure for e-commerce are missing the much-needed impetus to facilitate e-commerce and trade. In countries like Zambia and Burkina Faso, initiatives have been taken to update the strategic framework for the development of postal and delivery services. The Zambian Government, through the Ministry of Transport and Communications, is developing the National Postal Policy and Implementation Plan. It is also reviewing the legal framework (i.e., Postal Act of 2009) that governs the licensing mechanism for postal and courier operators. The Government of Burkina Faso, through the Ministry of Digital Economy and Postal Development, has prepared a Postal Sector Development Strategy 2019-2023. As part of the strategy, the same Ministry launched in 2019, the FASORANANA Marketplace of the Burkina Faso Post, a platform that allows businesses and citizens to sell or buy goods online.[51] This is in line with UPU recommendations on digital transformation of postal services initiatives and digital readiness for e-commerce outlined in the UPU E-commerce Guide 2020.

In Togo, SPT launched E-Colis, a service that allows its clients to order items from e-commerce websites abroad and receive packages cost-effectively, as packages are regrouped, thus lowering international delivery fees. In order to better structure the logistics sector, Togo has expressed interest in mobilizing support for the establishment of an intelligence unit to monitor new logistics solutions.

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[50] In January 2020, the Commerce Ministry launched a $2.5 million project dubbed Go4eCam, funded by the EIF, for the development of a unique government business-to-business and business-consumer marketplace. The project includes bootcamps for Micro-, Small- and Medium-size enterprises, small grants to help them launch online operations, and assistance to improve Cambodia Post's operational readiness for e-commerce.

[51] See https://www.ict4africa.net/2019/02/22/burkina-faso-fasoranana-une-plateforme-de-commerce-en-ligne-developpee-par-la-poste/

In Senegal, the national Post company introduced a new service in 2019 called "Jotnaci", which allows for express home delivery, including a dedicated offer for e-commerce providing return management, payment on delivery and integrating different local e-payment solutions.

In Myanmar, Nepal and Cambodia, public-private partnerships and paperless trade have gained momentum to upgrade logistics services and infrastructure. In Myanmar, the first multi-user warehouse was opened in November 2019 with the investment of DHL Supply Chain to provide integrated end-to-end supply chain solutions. Furthermore, customs clearance procedures were updated for the import of small express parcels with a $50 de minimis value. Nepal Post wants to implement a Customs Declaration System for better supply chain integration and data quality. A technical assistance project proposal for Electronic Advance Data messaging and compliance project is under consideration by the UPU. In Cambodia, both the Government and Cambodia Post are increasingly stepping up efforts to provide more opportunities from cross-border e-commerce (see Box 5).

Box 5   Cambodia making strides towards easier cross-border e-commerce and trade

The Government of Cambodia is leading an ambitious agenda to improve e-commerce logistics, involving the establishment of a strategic framework, greater digitalization of Cambodia Post and nurturing innovative partnerships. The Ministry of Public Work and Transportation is developing a Logistics Masterplan with Japan International Cooperation Agency (JICA) assistance to improve the country's trade logistics infrastructure, envisaging the establishment of a National Logistics Council, chaired by the Deputy Prime Minister. A National Trade Facilitation Committee has been initiated, also chaired by the Deputy Prime Minister.

An e-commerce platform called Tinh Tinh was launched in 2019, owned and operated as a joint venture between Cambodia Post, the Chinese firm YVS and local technology firm Paxxa mobile solutions. The platform allows merchants to register and sell their products online with order facilitation executed by Cambodia Post. This complements other efforts by Cambodia Post to digitalize payments through a new electronic payment and money transfer app launched in 2018, called "posTTransfer". The UPU has initiated discussions with Cambodia Post to develop a national postal e-commerce strategy that would be aligned with the national e-commerce strategy.

In March 2019, a partnership was inaugurated to foster cross-border logistics and e-commerce, by signing a MoU and entering into a cost sharing agreement between Ministry of Public Work and Transportation, United Nations Development Programme (UNDP) and 4PX Express Co. Ltd., a market leader in the shipping and logistics services industry. The initiative is geared towards building capacity of SMEs within the Cambodian e-commerce sector and fostering market access linkages between Cambodian and Chinese businesses. According to Cambodia's Readiness Assessment for Cross-border Paperless Trade,[52] carried out by United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP) in 2019, Cambodia has made significant progress in implementing trade facilitation measures in the past two years, but implementation in the areas of paperless trade and cross-border paperless trade remain challenging. Achieving cross-border paperless trade could help Cambodia save over $200 million in trade transaction costs annually. The assessment recommends the ratification of the Framework Agreement on Facilitation of Cross-border Paperless Trade in Asia and the Pacific, which Cambodia already signed in 2017. Along with Bangladesh, Myanmar and Nepal, Cambodia is one of the seven countries benefiting from such assessments, funded by the EIF and other development partners.

Source: UNCTAD

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[52]   See https://www.unescap.org/resources/readiness-assessments-cross-border-paperless-trade

Last, Lesotho has expressed interest in strengthening the operational capability of Lesotho Postal Services using the UPU Operational Readiness for e-Commerce Methodology. However, due to the COVID-19 pandemic this field process review has been postponed. This exercise will include a roadmap with recommendations for priority actions to be implemented by the Post in order to meet the necessary e-commerce requirements. In Vanuatu, the single window team and the national Post of Vanuatu have shown interest in interfacing UPU's customs clearance system (CDS) with the existing customs system based on ASYCUDA.

The COVID-19 pandemic has stretched the capacity of postal and logistics operators worldwide. The International Civil Aviation Organization (ICAO) and the UPU have encouraged targeted countries to continue to support their designated postal operators, air cargo carriers and express mail operators during the ongoing COVID-19 crisis and to provide support for future recovery efforts.[53]

T3- Implementation of the Trade Facilitation Agreement

The Trade Facilitation Agreement: an e-commerce enabler in need of higher traction across LDCs. The World Trade Organization's Trade Facilitation Agreement (TFA) outlines member countries' obligations to reducing red tape and harmonizing cross-border trade procedures, which in particular helps to improve the access of Micro-, Small- and Medium-size enterprises (MSMEs) to global trade.[54] The eT Readies have reaffirmed the role of the Trade Facilitation Agreement (TFA) as an enabler of e-commerce, because online shoppers are particularly sensitive to transparency and predictability.[55] Three years have elapsed since the entry into force of the TFA, but LDCs are still advancing at varying paces (see Figure 10). Among the 17 countries reviewed in this report that are WTO members (all except for Bhutan), only Bangladesh, Cambodia, Liberia, Senegal, Togo and Vanuatu[56] have implemented more than 33.8 per cent of commitments, i.e., the LDC global average. Samoa (non-LDC) has implemented more than 64.9 per cent, i.e., the developing countries global average. Cambodia, Liberia, Samoa, Senegal, Togo and Vanuatu stand out with an implementation rate exceeding 60 per cent, out of which Cambodia excels with almost 85 per cent of implementation. An area that needs greater attention from LDCs is the implementation of Cat. C commitments for which support in the form of technical assistance and capacity-building can be sought, and for which the mobilization of significant resources is needed from development partners.

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[53] See https://www.upu.int/en/Press-Release/2020/9/UPU-ICAO-urge-support-for-posts,-air-cargo-carriers-and-express-mail-operators-during-COVID-19-pande

[54] TFA implementation is also a cornerstone of the UN Global Survey on Digital and Sustainable Trade Facilitation, a joint initiative of UN Regional Commissions. The Survey, updated every two years, currently covers 128 economies around the globe, and 53 measures related to the WTO's Trade Facilitation Agreement (TFA), as well as emerging regional and global initiatives on paperless trade or e-trade, such as the recent Framework Agreement on Facilitation of Cross-Border Paperless Trade in Asia and the Pacific (FA-CPT). The latest Survey was published in 2019 and covers 13 countries reviewed in this report. For more information, see https://untfsurvey.org/

[55] For example, article 1 relates to increasing transparency in cross-border trade by urging countries to publish import, export and transit procedures. Article 7.6 suggests countries regularly publish their average release time of goods to help traders predict the retention time of their goods at the border. Article 10 aims at streamlining cross-border formalities. Especially SMEs that want to expand their markets to neighboring countries benefit from easier and accessible trade procedures. A more comprehensive analysis is available at: https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=1958

[56] It is worth reminding that only Vanuatu has ratified the Trade Facilitation Agreement after the publication of the eT Ready. For the current status of TFA ratifications, see https://www.tfafacility.org/ratifications

Figure 10 Total implementation rate of the Trade Facilitation Agreement in selected countries based on their notifications

- ■ Current rate of implementation commitments in Cat. A
- ■ Current rate of implementation commitments in Cat. B
- ■ Current rate of implementation commitments in Cat. C
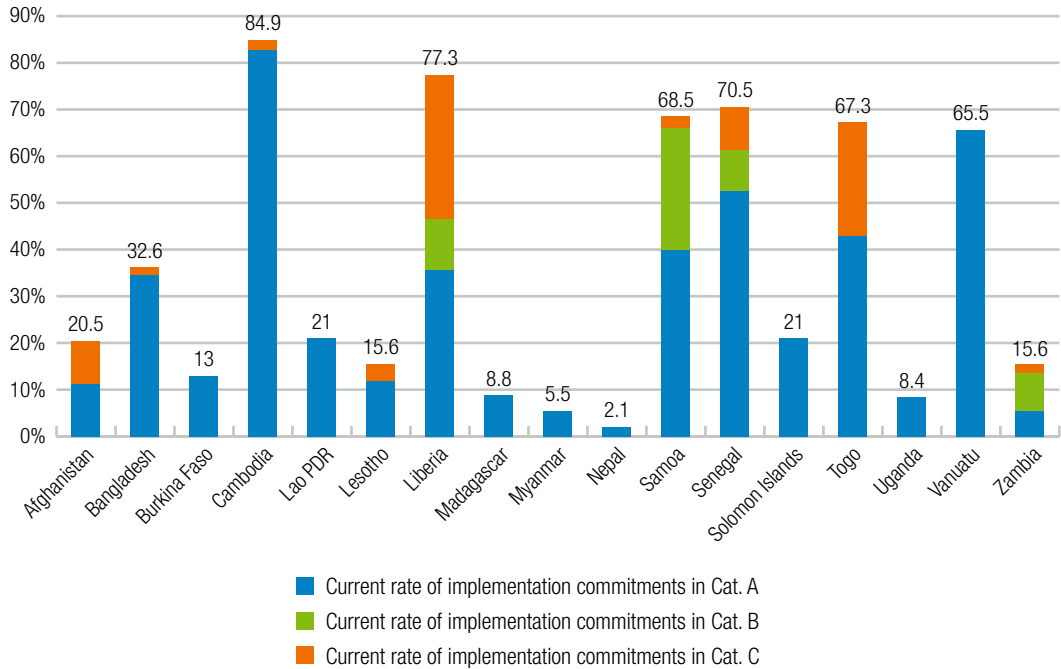
Source: WTO, TFA Database (https://tfadatabase.org/implementation/progress-by-member as of 29 June 2020)[57]

[57] Among the 13 countries covered by the scored performance assessment in this report, those with a TFA implementation rate above the average for their development status category have been marked under this thematic item (see Annex 1). Data used from the TFA database is cut-off at 30 June 2020, as the scored performance assessment takes into account data provided by countries through questionnaires before that date.

LEGAL AND REGULATORY FRAMEWORK

Building a sound legal and regulatory framework is key to infusing trust between consumers and businesses operating in the e-commerce ecosystem. The eT Readies have taken stock of laws and regulations related to electronic transactions, consumer protection, data protection, cybercrime and other relevant legislation, and in most cases have recommended carrying out a legal gap analysis, capacity-building and sensitization workshops and measures to strengthen law implementation. As with many other policy areas, the eT Readies have been an impetus for countries to accelerate legal reforms. Almost half of the countries reviewed by this report are currently assessing gaps in their legal frameworks, while the vast majority is pursuing new law initiatives to adapt to e-commerce as recommended in their eT Readies. More focus is being put on the need to build awareness and sensitize businesses and consumers on legal provisions applying to e-commerce transactions (see Figure 11). The overall implementation rate combining all 13 countries' implemented recommendations in relation to improving the legal and regulatory framework is 51 per cent (see Annex 1).

Figure 11　Number of implemented recommendations by country and thematic item under policy area "Legal and regulatory framework"

Legend:
- ■ L1- Regulatory review and gap analysis
- ■ L3- Awareness and sensitization
- ■ L2- New laws and regulation initiatives
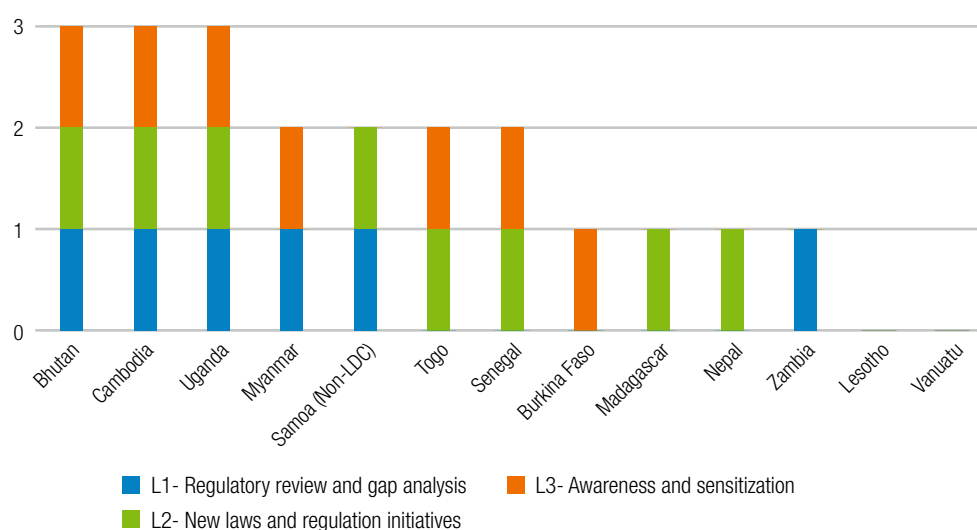
Source: UNCTAD

L1- Regulatory review and gap analysis

Countries under review regularly assess gaps in their regulatory framework to spearhead legal reforms. In Uganda, NITA-U together with the Ministry of ICT and National Guidance successfully carried out a gap analysis for all ICT laws, policies and regulations in 2019. Some of the recommendations from the gap analysis are currently being implemented. Zambia has enacted the Electronic Communications and Transactions Act No. 21 of 2009 to broadly support the growth of the digital economy and e-commerce. The Government is in the process of unbundling the Act to enact three separate bills which will include i) an Electronic Transactions and e-Commerce Bill, ii) a Cyber Security and Cyber Crimes Bill, and iii) a Data Protection Bill aimed at facilitating electronic transactions and the growth of e-commerce in Zambia, as well as at safeguarding users of digital platforms. Bhutan is updating the Information, Communication and Media Act of 2018, which is the overarching legislation pertaining to ICT and related services. In Samoa, UNCTAD has provided support to conduct a regulatory review of an e-commerce framework.

In Cambodia and Myanmar, a review of the e-commerce and regulatory framework has been carried out as part of the national e-commerce strategy formulation process. Particularly in Myanmar, the process has gone through different consultations and assessments, led by the Information Technology and Cyber Security Department, Ministry of Transport and Communications; discussions are ongoing to draft a Cyber Law covering three components of e-government, e-commerce and cybersecurity. Such an initiative has gained further momentum with the e-commerce boom during the COVID-19 crisis (see Box 6).

Box 6   Legal reforms even more critical as e-commerce booms during the COVID-19 crisis

In the context of eT Ready follow-up, the Government of Myanmar has prioritized the update of the regulatory framework, and in particular the development of a specific e-commerce law and a business registration system for e-commerce Micro-, Small- and Medium-size enterprises (MSMEs). The e-commerce law is meant to provide a level playing field to foster development of e-commerce sector in line with the ASEAN Economic Community framework, and an enabling environment for the e-commerce sector as well as the digital economy in Myanmar. The business registration will build upon a pilot project of a voluntary registration system undertaken by the Ministry of Commerce. Lessons learned from implementation will be applied to set up a one-stop registration platform, at both central as well as local state level. Such reforms will boost the credibility and confidence of consumers in e-commerce sellers and provide a central data system to monitor e-commerce activities.

Myanmar has experienced an exponential increase in B2C e-commerce demand during the COVID-19 health and economic crisis. Some established e-commerce platforms have flourished, but at the same time, they have faced stiffer competition from informal e-commerce operators. The Government of Myanmar has responded to the COVID-19 crisis by launching a comprehensive economic stimulus plan – "Overcoming as One: COVID-19 Economic Relief Plan" (CERP),[58] to provide fiscal and monetary relief to businesses. The CERP consists of seven comprehensive goals including one dedicated to e-commerce and the digital economy.[59] The goal aims at increasing use of mobile payment services and stimulating online retail by launching a central e-commerce website for retail businesses to sell their products online. It also includes the launching of the "Challenge Grant" competition where Myanmar-based technology firms are encouraged to present innovative ideas to combat COVID-19. This stimulus package can contribute to making e-commerce growth sustainable in the long run. Additionally, improvements in the business environment through e-commerce legal reforms can help to make such growth more sustainable and fairer.

Source: UNCTAD

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[58]   See See https://unctad.org/news/myanmar-shows-great-e-commerce-promise-covid-19-response

[59]   In particular Goal 5: Promoting Innovative Products & Platforms, the Plan is available here https://www. ccifrance-myanmar.org/sites/ccifrance-myanmar.org/files/resources-documents/covid-19_economic_relief_ plan_by_ministry_of_planning_finance_and_industry27.04.2020.pdf

UNCTAD's involvement in the Association of Southeast Asian Nations (ASEAN) region has backed such initiatives. This has been done through a series of regional and national capacity-building workshops on e-commerce since 2003 and more recently through the eT Readies for Cambodia, Myanmar and the Lao PDR, which has provided valuable input to the ASEAN 2017-2025 Work Programme on E-Commerce. Legal reform initiatives at the regional level are also ongoing in West Africa, where the two regional economic communities, ECOWAS and WAEMU, initiated in 2019 a joint project to review and update the legal and regulatory framework applying to the digital economy with the support of the European Union in the context of the forthcoming regional e-commerce strategy.[60]

L2- New laws and regulation initiatives

New laws are strengthening the regulatory framework applicable to e-commerce. E-Commerce Guidelines, developed in 2019 in Bhutan, are bringing more clarity on the legal aspects of e-commerce activities. In Cambodia, two important laws have been passed in November 2019: The E-Commerce Law, which is being complemented by an implementation sub-decree meant to ease the registration of e-commerce businesses, and the Consumer Protection Law, aimed at better safeguarding the rights of online shoppers and businesses. A number of draft laws are under review.[61]

In Nepal, the national e-commerce strategy has created momentum to formulate required laws. The Ministry of Communication and Information Technology has been working on an umbrella act to address issues such as privacy protection, consumer safety and data protection. Similarly, the Department of National ID and Civil Registration has already prepared a bill related to a biometric national ID. The Parliament has approved the bill.

In Madagascar, the Ministry of Commerce issued an e-commerce Technical Guide (fiche technique d'encadrement) in February 2020 outlining the obligations of e-commerce seller and steps to be undertaken to ensure consumer protection and personal data protection.[62] In Samoa, amendments to the Competition and Consumer Act 2016 are in the pipeline.

In Senegal, a review of the existing laws was initiated with the objective of revising the legal framework applicable to cybercrime, e-transactions, personal data protection, competition and price control regulation. A personal data protection bill has been drafted and submitted for parliamentary review. Furthermore, Senegal passed a new Electronic Communications Code in December 2018 that contains provisions applicable to services traded via telecom networks. In Togo, new laws were passed: i) the law on cybersecurity and the fight against cybercrime in December 2018, providing for the establishment of a Computer Emergency Response Team and a Security Operating Center, and ii) the law on personal data protection in October 2019, which followed a bill adopted by the Council of Ministers to enable the ratification of the African Union Convention on Cyber Security and Personal Data (also known as Malabo Convention).[63] In Uganda, the Data Protection and Privacy Act 2019 was passed and assented to by the President in February 2019.

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[60] Since 2000, the UNCTAD E-commerce and Law Reform Programme has provided support to developing countries in Africa, Asia, Latin America and the Caribbean through capacity-building workshops including e-commerce legislation harmonization. In West Africa, this has led to the publication of a review of e-commerce legislation harmonization in the ECOWAS region, see at https://unctad.org/en/PublicationsLibrary/dtlstict2015d2_en.pdf

[61] Drafted law proposals include: i) a review of the current Investment Law, ii) a draft Cybercrime Law, currently under review and led by Ministry of Interior and Ministry of Justice, iii) Framework and associated Laws on Digital Identification being drafted by Ministry of Interior, and iv) Competition Law, which is expected to be promulgated in 2020.

[62] See https://fr.allafrica.com/stories/202002130627.html

[63] Furthermore, an implementing decree was issued in February 2019 to operationalize the National Cybersecurity Agency. In 2019 the process was launched to establish an Electronic Certification Authority and certification procedures.

L3 - Awareness and sensitization

Increasingly more training and sensitization activities are shaping awareness and knowledge of the legal framework for building trust across the entire ecosystem. In Bhutan, public awareness and advocacy programmes are conducted as part of the implementation of e-commerce guidelines. In Cambodia, the Ministry of Commerce has conducted dissemination workshops on the Law of E-commerce and the Law of Consumer Protection as part of Go4eCam project, which aims to build user trust through government's initiatives.

In Burkina Faso, the Graine e-commerce project included an awareness-raising component for e-merchants.[64] Additionally, the Data Protection Commission carried out training on the protection of personal data for the administration and justice stakeholders. In Togo, the ICT regulatory authority has organized several training and awareness workshops on the legal provisions applicable to e-transactions. In Senegal, during the preparation of the SNDCES, a large campaign covering the country's 14 regions was carried out to collect data, raise awareness and provide information on electronic commerce. One of the major projects also proposed as part of the SNDCES is to conduct a large awareness campaign on digital technology, and electronic commerce in particular. For its part, the Commission for the Protection of Personal Data organized several awareness-raising activities on issues related to personal data in schools in Senegal.

In Myanmar, the Post has opened customer care centers to help solve customers' complaints in real time. In Uganda, NITA-U has carried out a broad sensitization effort on ICT laws across all levels of society, through workshops, radio and TV talk shows customized to a particular audience, as well as through social media platforms to push the public's use of digital transaction during the country COVID-19 lockdown.

Nepal has expressed the need for further capacity-building of Government officials and private sector on issues of privacy and consumer protection, fraud prevention measures, and law drafting as one of the priority requests for support in the context of this monitoring exercise.

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[64] This is an initiative run by BeoogoLab, a digital entrepreneurship support structure, aimed at creating viable e-commerce and e-service companies in Burkina Faso, by selecting entrepreneurial initiatives that innovate in the field of e-commerce. The project provides support through incubation, growth, financing and fundraising assistance. See https://www.burkina24.com/2019/02/05/burkina-beoogolab-seme-les-graines-du-e-commerce/

PAYMENT SOLUTIONS

Electronic payment solutions are an essential building block to enable e-commerce. The eTrade Readiness Assessments across countries and regions found that an overreliance on cash-based transactions marked all ecosystems. Since the initial eT Readies were carried out, technological trends have evolved. Consequently, so have e-payment solutions. Public and private sectors in the reviewed countries are significantly investing in e-payment solutions (see Figure 12). They also need to sustain efforts towards greater financial inclusion and international cooperation to promote cross-border e-payment solutions and their interoperability. The overall implementation rate combining all 13 countries' implemented recommendations in this policy area is 60 per cent.

Figure 12 Number of implemented recommendations by country and thematic item under policy area "Payment solutions"

- P1- Financial inclusion
- P2- Interoperability of e-payments
- P3- Trust in online transactions
- P4- New e-payment options and innovation
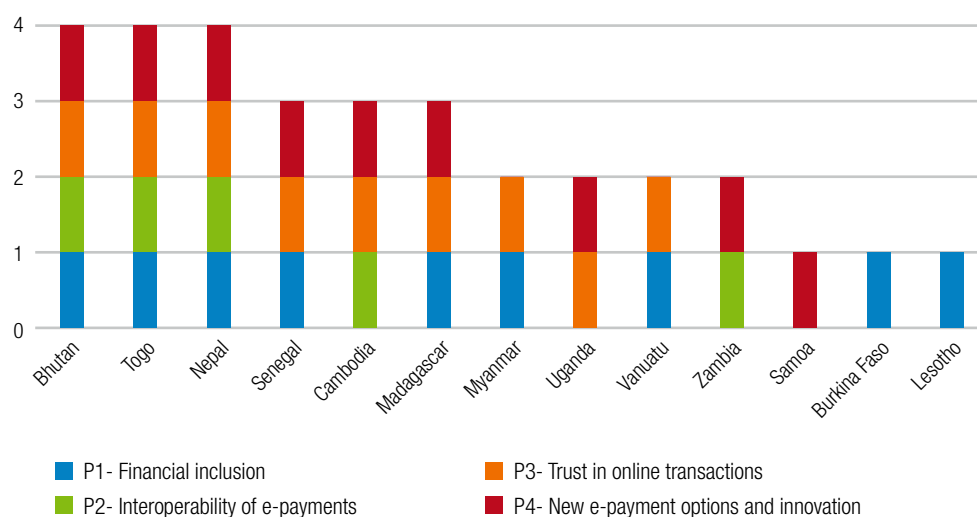
Source: UNCTAD

P1- Financial inclusion

Countries are moving at speed towards more financial inclusion, beyond traditional banking and through digitalization of payments for government services. Togo, Senegal, Burkina Faso are involved in a Central Bank of Western African States' project to increase access to microfinance institutions (MFIs), especially in rural areas. Through upgrading their technological solutions, the MFIs are going to be integrated into the regional payment system. This integration would then allow MFIs to issue bank cards, pre-paid credit cards and establish mobile wallets.[65] Similarly, Burkina Faso and Madagascar are undertaking financial inclusion projects with assistance from the World Bank. The projects are targeted at individuals and MSMEs and aim to encourage the use of transaction accounts. This can be achieved by digitalizing MFIs and government payments and then expanding credit to individuals and MSMEs.[66] In Burkina Faso, with the assistance of the UPU, SONAPOST will introduce a card-based system allowing customers to access their money at

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[65]   See https://www.bceao.int/sites/default/files/2020-03/Bulletin_d%27Information_N%C2%B01_OK.pdf (accessed 29 June 2020)

[66]   See https://projects.worldbank.org/en/projects-operations/project-detail/P161491?lang=en https://projects.worldbank.org/en/projects-operations/project-detail/P164786?lang=en http://dohacongress.upu.int/uploads/media/FITAF_factsheet_EN.pdf

ATMs across the country and in neighboring countries, as well as giving them the ability to conduct online transactions.[67]

Vanuatu was the first country in the Pacific to introduce online payments for customs to speed up the clearance process of incoming goods.[68] In 2019, Madagascar made its tax filing system more comprehensive by integrating digital payments into their platform with all commercial banks supporting this online tax payment.[69] Similarly, Yangon's municipal tax collection went digital, increasing the revenues and lowering transport costs because no house-to-house collection is required anymore. Bhutan, Lesotho, Myanmar and Nepal have also integrated digital payments for government services, which range from company registration, issuance of passports and paying traffic fines.

P2- Interoperability of e-payments

Countries are improving interoperability of digital payment options. Meanwhile, greater efforts towards seamless cross-border e-payments are needed. Countries have scaled up national payment infrastructures to support the use of non-cash options – bank accounts, cards and mobile money wallets from different providers. Launched in 2017, Cambodia's Switch System now allows for interoperability of cards issued by Cambodian banks at ATMs and point-of-sale machines in stores. Nepal aims to have its switch system in place during 2020. Togo's Ministries of Posts and the Digital Economy and of the Economy and Finance announced the development of a mobile money platform "TogoPay" that would allow transfers from a range of mobile money providers to interact and be processed.[70] Zambia's National Financial Switch project has two phases: First, make card transactions and banks interoperable and second, integrate mobile payments into this. This new switch system reduces transaction costs for payments significantly because prior to 2019 the switching of payments from one bank to another was done abroad, therefore making any transaction a costly international transfer.[71]

Bhutan expanded the scope of its Financial Switch by integrating with neighboring India to allow for better e-commerce flows across the two countries. Cambodia and Thailand have introduced interoperable QR payments to improve their cross-border e-commerce flows. Samoa aims to collaborate with development partners on developing an online payment tool for fast and secure international transactions, as indicated in the context of this monitoring exercise.

The Central Bank of Western African States has closed the first phase of the regional financial services interoperability project launched in 2017 and opened the next implementation phases in October 2019. Moving from feasibility to implementation, the project is now leading towards the adoption of the technical solutions and appropriate regulatory framework, the organization of the communication campaign, and finally the launch of the platform.[72] Strengthening regional cooperation to move towards regional interoperability of financial services is also a priority project Senegal is advocating for, according to this eT Ready monitoring review. Additionally, the African Continental Free Trade Area included the adoption of a pan-African payment and settlement system as one of five key instruments of the operational phase on its agenda to improve cross-country interoperability.[73]

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[67] http://dohacongress.upu.int/uploads/media/FITAF_factsheet_EN.pdf

[68] See https://dailypost.vu/news/vanuatu-becomes-first-pacific-country-to-implement-customs-online-payment/article_1b805d34-aa50-52c6-805f-495b693d2493.html

[69] See https://e-hetra.impots.mg/

[70] See https://numerique.gouv.tg/vers-linteroperabilite-des-services-financiers-electroniques-au-togo/

[71] See http://www.zechl.co.zm/national-financial-switch/#

[72] See https://www.financialafrik.com/2019/09/30/uemoa-la-bceao-annonce-les-4-prochaines-etapes-du-projet-dinteroperabilite-des-services-financiers/

[73] See https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=2405

P3- Trust in online transactions

One reason for the slow uptake of new digital payments solutions is lack of trust in their security. Most countries under review have worked on improving the security infrastructure of online transactions. Bhutan, Senegal, and Vanuatu have established specific cyber emergency response teams. Their mandates are cybersecurity overall, with online transactions as a component. Senegal's "Plateforme numérique de lutte contre la cybercriminalité" is a division of the police with forensic experts. Hence, it focuses less on prevention and more to pursuing criminal activity.[74] Vanuatu's CertVU allows for immediate reporting of incidents on their website.[75] The service also offers cybersecurity awareness programmes for individuals and organizations. Togo plans to take a more regional approach: at the end of 2020 it envisioned launching "Cyber Defense Africa", an agency for cybersecurity for the continent in collaboration with a data security firm.[76]

An initiative directly targeting e-commerce transaction security is Cambodia's real time gross settlement system that reduces the lag between transactions of different banks. Hence, the transaction risk decreases. To make cards safer, Myanmar started upgrading the safety standard of cards issued by the Myanmar Payment Union to an international security standard. Nepal's central bank requires institutions it licenses to undergo regular IT audits that include requirements for original software, security system penetration tests and establishing business continuity plans. In May 2020, Uganda's Parliament passed the National Payments System Bill. The bill integrates electronic money more comprehensively into the payment system and thereby increases transaction security by explicitly providing for digital payments and requiring the providers to comply with central bank regulation. Similarly, a draft banking law was proposed by the Central Bank of Madagascar to the Malagasy government in 2019 to better secure payments and digital financial transactions

P4- New e-payment options and innovations

The offer of e-payment options is steadily expanding. This development has two noticeable aspects: new online banking or mobile money wallet options from banks or phone providers and new payment methods – often these are interlinked. The COVID-19 pandemic has accelerated this trend, particularly in Africa (see Box 7).

Togo's Orabank introduced a new digital platform that combines online banking and e-wallet. It also has a messenger function through which money can be transferred between individuals.[77] Another bank, Sunu Bank, collaborated with a local fintech company to introduce WhatsApp banking. Through a WhatsApp chat with the bank, customers have immediate access to their account information, can charge their mobile wallets as well as pay electricity and TV subscriptions.[78] Madagascar's MVola has become the first officially recognized electronic money issuer institution, which gives the accounts better access to receiving money from abroad and real-time transfers with bank accounts.

Samoa and Solomon Islands have introduced EziBank and EziPei, a combination of bank account and e-wallet. Given the geography of both countries this is a milestone. It turns the mobile phone agents into easily accessible banking agents, reducing opportunity costs for customers.[79] Additionally, both wallets of Samoa's mobile phone providers are integrated into Maua, an

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[74]   See https://www.gendarmerie.sn/index.php/category/pnlc/

[75]   See https://cert.gov.vu/

[76]   See https://asseco.com/news/asseco-is-creating-national-cyber-security-center-for-togo-3171/

[77]   See https://keaz.orabank.net/

[78]   See https://wb.semoa-group.com/ https://www.ict4africa.net/2020/02/26/togo-la-sunu-bank-lance-le-whatsapp-banking/

[79]   See https://www.pacific.undp.org/content/pacific/en/home/presscenter/pressreleases/2018/nbs-launches-new-digital-banking-product.html

e-commerce mobile platform, with the intent of facilitating e-commerce in Samoa especially for customers without formal bank accounts or without credit cards.[80]

PiPay in Cambodia is an e-wallet launched in 2017 and merged with one of its largest competitors SmartLuy in early 2020. The wallet aims to create its own self-contained ecosystem, with transfers, bill payments, specific customer discounts based on geo-location and - adapted to the regional context, "virtual red envelopes" for gifting. The overarching aim is to make spending money more attractive and easier within this environment than withdrawing it.[81] In Nepal, the central bank, Nepal Rastra Bank, has revised upward the limit of various e-payment platforms on a regular basis. New entities have been granted license to enter into the payment industry, and the number of payment means have boomed in recent years including Esewa, Khalti digital wallet and IME Pay among others.

Box 7   Payment solutions and COVID-19 in Africa

Digital payment solutions were already on the rise before the pandemic. However, during the phase of social distancing, payment providers took additional steps to encourage cash-less payments.

Togo's Orabank introduced contact-less card payments in May 2020 for a value of FCFA 15,000 (about $27).[82] Additionally, a platform called Novissi ensures cash transfers through electronic money to those affected by job losses, particularly in the informal sector, to offset the income loss incurred as a result of the COVID-19 crisis. The amounts received can be used by beneficiaries to buy essential goods and pay water and electricity bills. In Burkina Faso, COVID-19 accelerated private sector projects to develop platforms for payment aggregation, such as LAGFO, supported by the fintech TICANALYSE, which allows individuals to make purchases online using QR or USSD codes instead of needing a credit card. These initiatives benefited from the intervention of the Central Bank of Western African States, through its announcement No. 004-03-2020 relating to promotion of electronic payments in the context of the fight against COVID-19.[83] This intervention helped stimulate the use of electronic payments and innovation, both in the public and private sectors across the WAEMU region.

MTN in Zambia increased flexibility by reducing transaction fees to zero for transactions below ZMW 100 (about $5.50) as well as increasing maximum wallet holdings and transaction limits. In Uganda, MTN, a mobile phone provider, made mobile money transfers between customers free for 30 days during the COVID-19 outbreak to limit contagion through the exchange of money.[84] Between 2015 and 2019, mobile money transactions in Uganda more than doubled in value, from about $9 billion to $20 billion, according to the country's central bank.[85] Despite such growth, concerns over trust in online transactions and digital financial services remain paramount within the EAC region. As a world leader in the use of mobile money solution and strong intra-regional trade, the region has a great potential for e-commerce development, which could be further propelled by the recent implementation of the African Continental Free Trade Agreement (AfCFTA), as well as plans to develop a regional e-commerce strategy as mentioned earlier in the report.

Source: UNCTAD

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[80]   See https://www.samoaobserver.ws/category/samoa/55834

[81]   See https://www.cryptoasia.co/top-mobile-payment-systems-cambodia/

[82]   See https://www.togofirst.com/fr/finance/1105-5502-orabank-togo-innove-avec-le-paiement-sans-contact

[83]   See https://www.bceao.int/fr/reglementations/avis-ndeg-004-03-2020-relatif-aux-mesures-de-promotion-des-paiements-electroniques

[84]   See https://www.reuters.com/article/health-coronavirus-uganda-mtn/mtn-uganda-eliminates-mobile-money-charges-amid-coronavirus-outbreak-idUSL8N2BI39N

[85]   See https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=2442

Bhutan has seen two mobile money platforms launched relatively recently, B-ngul and Chharo in the past two years. The former is particularly targeted at unbanked people, whereas the second one is interoperable with all banks in Bhutan and even encourages tourists to use it to increase efficiency in payments. Digital payment adoption rates are promising with 76 per cent of transactions processed in Bhutan's payment and settlement system in 2019 being digital (compared to two per cent paper-based cheques, 22 per cent cards). However, the digital transaction value still has potential to grow, as it constituted only a quarter of the overall transaction value.[86]

The most consistent trend in payment innovations across countries are QR payments. Bangladesh, Bhutan, Cambodia, Nepal, Senegal, Togo, Uganda and Zambia provide examples of this new payment solution, and Lao PDR has recently launched a QR code for domestic payments.[87] The technology is beneficial because it does not require high set-up costs for payment processing, hence is also accessible to smaller e-commerce businesses and to consumers with limited Internet connectivity. A report from GSMA highlights that merchants using QR codes transacted three times more in value than merchants who only offer other channels.[88] The expansion of interoperability of payments cross borders, as it has been the case of the above-mentioned innovation covering Cambodia, Thailand and Singapore, is promising. E-commerce transactions there become much easier as QR code payments reduce the risk of making mistakes during a transfer process.

[86]   These numbers refer to payments going through the payment and settlement system. Hence, they do not compare to cash transactions. Available at: https://www.rma.org.bt/RMA%20Publication/DPSS/Annual%20 Payment%20System%20Report%202019.pdf

[87]   See https://www.bol.gov.la/en/fileupload/02-04-2020_1585800369.pdf

[88]   QR codes hold particular promise because they can be offered without access to mobile Internet. At their most basic, QR code solutions only require static QR code stickers to begin facilitating payments and can work using a phone with a camera in conjunction with USSD. Available at: https://www.gsma.com/sotir/wp-content/ uploads/2020/03/GSMA-State-of-the-Industry-Report-on-Mobile-Money-2019-Full-Report.pdf

SKILLS DEVELOPMENT

Access to digital skills is essential to foster a competitive e-commerce ecosystem. The eT Readies have concluded that there is a significant mismatch between the needs of e-commerce businesses and available workforce skills. This mismatch originates from untailored curricula at different levels of the education system. This is often complemented by a lack of public sector capacity to support e-commerce skills development initiatives. In recent years diverse initiatives across countries and continents have started to tackle this gap in e-commerce skills, particularly through a dynamic constellation of private sector-led digital entrepreneurship initiatives. The reviewed countries have undertaken various initiatives (see Figure 13). The overall implementation rate combining all 13 countries' implemented recommendations in this policy area is 38 per cent.

Figure 13 Number of implemented recommendations by country and thematic item under policy area "Skills development"

S1- Skills gap review
S2- Education and training
S3- Digital innovation
S4- Gender-related capacity-building
S5- Public sector capacity development
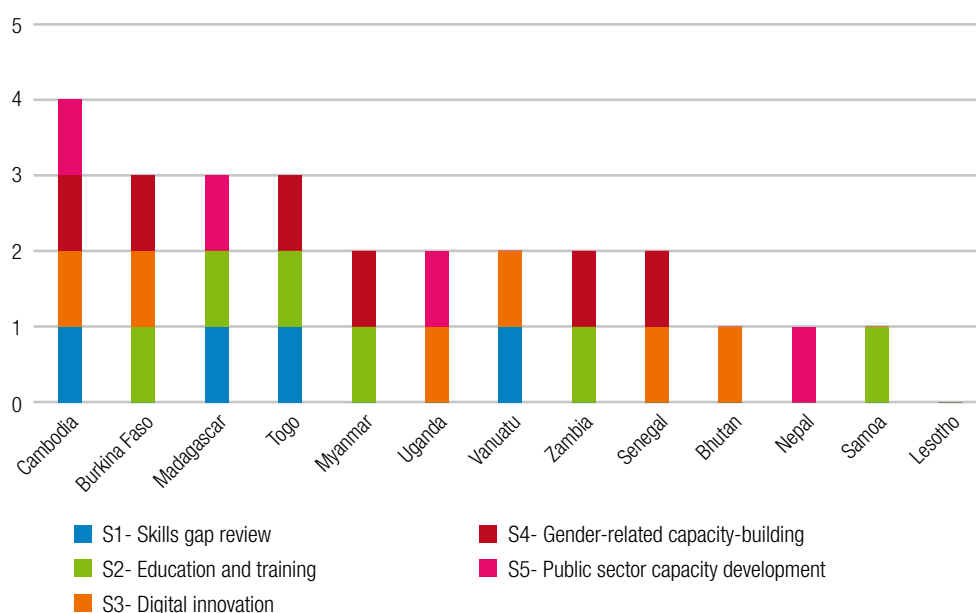
Source: UNCTAD

S1- Skills gap review

Cambodia, Madagascar, Togo and Vanuatu have undertaken skills gap analyses or are in their implementation phase. The World Bank's report "Cambodia's Future Jobs: Linking to the Economy of Tomorrow" and the Cambodian Trade Integration Strategy 2019-2023 identify strengthening skill development and the education sector as a vital factor to increase Cambodia's competitiveness. To date, only 13.5 per cent of the population has a high school degree[89] and an additional six per cent complete post-secondary education.[90] Consequently, both the Cambodian Trade Integration Strategy and the draft E-commerce strategy emphasize the need for closing the skills gap through digital literacy, IT skills and digital entrepreneurship skills to spur high-quality, competitive enterprises.

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[89]   See http://documents.worldbank.org/curated/en/224811567668159930/Main-Report

[90]   Cambodian Trade Integration Strategy 2019-2023

The Fonds Malgache de Formation Professionelle, an organization funded through contributions from Madagascar-based enterprises and the Agence Française de Développement (AFD), is currently undertaking a skills gap analysis. Togo's Ministry of Posts, the Digital Economy and Technological Innovations and the Ministry of Higher Education are jointly working on a project to develop modules on ICT education that meet the needs of the private sector. To define these needs, the project is supposed undertake a skills gap analysis to determine the status quo. Vanuatu's first Human Development Plan aims to close the skills gap that the accompanying Technical Report identified as barriers to achieving the national development goals.[91] Myanmar and Zambia have expressed interest in receiving support to conduct an e-commerce skills gap analysis.

S2- Education and training

A growing number of countries are integrating ICT skills into their schools' curricula and advanced education. In 2019, 27 additional primary and secondary schools in Madagascar became part of the Orange Foundation's "Ecole Numérique" programme, which brings the total number of schools up to 96. The programme provides each school with 50 tablets, a projector, large screen, and servers with educational content, such as online tools of the Khan Academy and the educational resources of the Ministry of National Education. With this expansion, the programme could give 44,000 students access to digital educational content.[92] Togo's Ministry of Posts, the Digital Economy and Technological Innovations and the Ministry of Primary and Secondary Education initiated the project "Environnement Numérique du Travail" which equips technical high schools with multimedia rooms with high-speed Internet connection and hardware containing online courses, digital libraries and other software. Initially 181 classrooms are to be connected in 10 schools, accessible to 8,500 students and 820 teachers. The project also integrates a training component for teachers and students to use ICT effectively in education.[93]

Samoa has introduced teaching of computer basics in secondary school. Asikana Network, a Zambian social enterprise, and Facebook launched eZibo, a digital literacy programme, in 2019. The programme aims to teach students about online safety across 30 schools in six provinces.[94] Similarly, Myanmar's Ministry of Education launched a digital literacy project for online safety and resilience in 2019. The project aims to bridge the skills gap between different users.[95]

More tertiary education institutions address ICT and digital entrepreneurship skills. Burkina Faso has integrated ICT training into its technical and vocational education, as well as in universities and polytechnic institutes. In Madagascar, the Ministry of Technical Education and Vocational Training introduced new vocational certificates (certificate d'aptitude professionnel). The certificates are supposed to tackle the skills mismatch faced by employers in several sectors, one of them being ICT.[96]

Myanmar's Ministry of Education together with Ooredoo, a mobile network provider, and Google launched a digital literacy training programme. It started in 25 education colleges and 25 teacher training schools to improve teachers' digital skills and thereby indirectly influence students' skills going forward.[97] Assistance for an e-commerce skills development project, undertaking a skills

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[91] See https://rti.gov.vu/index.php/en/policy-legislation/policy/nsdp/national-human-resources-development-plan

[92] See https://actu.orange.mg/27-nouvelles-ecoles-numeriques-a-deployer-a-madagascar-en-2019/

[93] See https://tech228.com/togo-lycees-techniques-dotes-environnement-numerique-travail-preparer-apprenants-marche-emploi/

[94] See https://www.techgistafrica.com/news/asikana-network-facebook-to-launch-ezibo-digital-literacy-program-in-zambia/

[95] See https://www.moi.gov.mm/moi:eng/?q=news/20/08/2019/id-18804 (accessed 13 July 2020)

[96] See https://www.afd.fr/en/actualites/madagascar-training-offer-gives-new-hope-building-and-public-works-companies

[97] See https://www.ooredoo.com/en/media/news_view/ooredoo-myanmar-and-the-ministry-of-education-collaborate-with-google-for-a-digital-literacy-and-digital-citizenship-training-program-nationwide-2/

gap analysis to reform curricula development and on-the-job training, is one of the priority projects indicated by Myanmar in the context of this monitoring exercise.

In Togo, ESIBA business school, a private university, has developed an entire branch of degree programmes focused on digital technologies. The specializations include management of innovative projects, digital marketing, digital economy, as well as management of mobile networks and security.[98]

S3- Digital innovation

A growing number of innovation-building opportunities, particularly through incubator programmes, competitions and prizes, are helping entrepreneurs develop their e-commerce specific skills. Bhutan's Department of Cottage and Small Industry launched the Startup Center in 2018. This incubator, specific to cottage and small industries, supports the chosen entrepreneurs through training in marketing, product design and development, as well as financial literacy.[99] Similarly, the Bhutan Innovation and Technology Centre (BITC) includes a business incubator to support SMEs and high-potential entrepreneurs in growing their business. This is complemented by training on management, entrepreneurship, business development and customer service. Additionally, the BITC is going to add an e-incubation service that will provide business advisory and information for SMEs in remote areas.[100] Bhutan has prioritized building national capacity for digital economy as one of the projects proposed in the context of this monitoring exercise, and recognizes that there is not only the need for education and creation of awareness on e-commerce but also in identifying functional areas of different agencies in the Government that interface with it.

BeoogoLab's "Les grains du e-commerce burkinabè" initiative accompanies selected start-ups from Burkina Faso's e-commerce sector through mentoring until they receive outside financing.[101] In the context of this monitoring exercise, the Government of Burkina Faso has expressed interest in seeking support for the creation and/or upgrading of e-commerce and e-payment platforms, as well as targeted assistance for disseminating information, education and an awareness programme for e-commerce.

In December 2019, Vanuatu's V-Lab business incubator started its first incubator programme. The four selected businesses will benefit from training in IT, communication, marketing, banking literacy and business development to prepare them for participation in e-commerce.[102] Togo has indicated interest in finding support for the establishment of incubators and accelerators to foster digital innovation uptake across SMEs.

Cambodia's Ministry of Posts and Telecommunication established a Capacity Building and Research Fund. The Fund is financed by contributions from Internet service providers, which contribute one per cent of their gross revenue. The contributions support capacity-building, research and innovation activities to strengthen the digital economy. Entrepreneur skills are honed through pitching competitions, ideation programmes and, soon, through the National Institute of Posts, Telecoms and ICT innovation center.[103] The Go4eCam project also includes a bootcamp to help 50 MSMEs annually go online through mentoring and coaching.[104] Similar to these bootcamps, Uganda's Stanbic Bank has introduced a three-month business incubator programme that aims at capacity-building and entrepreneurship development for SMEs. The programme has recently expanded, so that it now has four regional incubator hubs. The programme has several cohorts

[98] See http://www.esiba.tg/index.php?dev=pst

[99] See https://www.moea.gov.bt/?p=5032

[100] See https://thimphutechpark.bt/bitc/

[101] See https://www.burkina24.com/2019/02/05/burkina-beoogolab-seme-les-graines-du-e-commerce/

[102] See https://www.v-lab.org/our-incubation-program.html

[103] See https://www.khmertimeskh.com/50653600/tech-building-breaks-ground-in-nipticts-campus/

[104] Available at https://www.cambodia-ariseplus.asean.org/reports/sme-support-cambodia

with different focus. One particularly relevant to e-commerce is logistics and transport, including transportation of goods, equipment logistics, warehousing and logistics support services. In all its streams the programme had trained 1,500 entrepreneurs from 505 SMEs by December 2019.[105] Also in Uganda, the Netherland Trust Fund IV project carried out by the International Trade Centre (ITC) aims to improve export competitiveness of IT and IT-enabled services through upskilling MSMEs in the sector.[106] Senegal launched its export strategy on IT and business process outsourcing (stratégie IT/BPO) in April 2019. The strategy intends to make the country Africa's leader in francophone IT service exports, by improving the capacity of start-ups and businesses in the digital economy, for instance in the field of export marketing.[107] Such efforts go hand in hand with policy initiatives raising the profile of the digital start-up ecosystem, thanks to the adoption of a Start-up Act (see Box 8).

Box 8   Senegal in the starting block of countries that have adopted a start-up act

The Act adopted in January 2020 is the result of a successful bottom-up public-private cooperation involving different stakeholders in the innovation ecosystem. The legislative intervention was the first of its kind in Sub-Saharan Africa, after Tunisia paved the way for such initiatives on the African continent. More countries in the region are following suit and are at an advanced stage, including Ghana and Mali. The latter country has adopted a Startup Act law draft by the Council of Ministers and is waiting for approval by the Parliament, as mentioned in the recently released Mali eT Ready. In Senegal, this new piece of legislation enables the Government to take fiscal and administrative measures, as well as to access financing facilitation and business support measures, in addition to creating more favorable conditions to access public procurement. The Senegal StartUp Act was accompanied by a measure in the 2020 Finance Law providing fiscal exemptions for the first three years and the reduction in business registration fees for start-up companies. The StartUp Act will also contribute to fostering policy cooperation, as an ad hoc decree is foreseen for the creation of a Startup Evaluation Commission serving as public-private cooperation platform for innovation matters. A thriving digital ecosystem and start-up support infrastructure is fundamental to fuel the creation and growth of e-commerce businesses. Instruments such as the StartUp Act are welcomed by the e-commerce private sector because they pave the way to different forms of support, including financial measures and public-private partnerships, and can be powerful drivers for COVID-19 economic recovery plans. Building on these achievements, the Government of Senegal has expressed interest through this monitoring exercise in mobilizing support to run an information, education and awareness campaign on the benefits of e-commerce across all segments of population, which would also contribute to fast-track implementation of the SNDCES.

Source: UNCTAD

[105] See https://www.hiretheyouth.org/stanbic-bank-business-incubator/; https://www.ceo.co.ug/468-entrepreneurs-complete-training-at-stanbic-business-incubator/

[106] See https://www.intracen.org/nouvelles/ITC-launches-Netherlands-Trust-Fund-IV-project-in-Uganda-en/

[107] See https://www.intracen.org/NTF4/IT-Senegal/

Innovation competitions and prizes are well appreciated by digital entrepreneurs in several of the reviewed countries. These opportunities do not necessarily build new skills; however, they can help identify people with required skills and provide incentives to invest in skills development. The Bhutan Startup Hackathon Challenge in February 2020 aimed at developing innovative technological solutions to problems faced by the country's citizens. Winners of the competition could get direct entry to a start-up accelerator programme.[108] The DEV/champion coding competition across ECOWAS countries identifies programming talents for start-ups, national and international businesses as well as administrations.[109] Cambodia's Ministry of Commerce and Ministry of Industry and Handicraft are involved in the Cambodian Young Entrepreneur of the Year Awards in association with the Young Entrepreneurs Association of Cambodia and the Junior Chamber International Cambodia to recognize promising young entrepreneurs and raise their profiles.[110] In Senegal, the Linguère digital challenge by phone provider Sonatel rewards the best three women-led ICT companies. The winners receive prize money and access to different Senegalese incubator programmes.

S4- Gender-related capacity-building

To bridge the gender gap in entrepreneurship, the private and public sector have launched new initiatives for women entrepreneurs in seven of the reviewed countries. Zambia's Asikana Network supports capacity-building for women and girls in tech. The incubator Innov'up, from the Federation of Female Entrepreneurs and Businesswomen of Togo, offers training to start-ups in the digital economy, including marketing, packaging, sales, financial management and leveraging IT for business growth.[111] Orange Senegal has organized in 2020 a 100 per cent free online version of the Linguère digital challenge. This online support program intends to train women entrepreneurs, inspire them and connect them on the essential aspects of their project: business development, digital marketing, resource management. In addition, successful experts and entrepreneurs will regularly host keynote conferences to share their experience. Myanmar has several ongoing initiatives to provide digital skills training to women entrepreneurs: The Ooredoo Geek Girls Myanmar Project is an initiative of the phone provider's accelerator and the Connected Women conference, linked to GSMA's Connected Women programme. It aims to explore how technologies can be used to empower women in Myanmar and contribute to the country's development. Technovation Cambodia provides a business incubation programme focusing on young women entrepreneurs. USAID initially launched the programme in 2014, with increasing involvement from Cambodian counterparts. From 2020 onwards, the Institute of Technology of Cambodia will coordinate Technovation Cambodia. It offers a three-month programme for young women to become digital entrepreneurs and ends with a pitching competition that gives access to the global Technovation pitch in the United States of America.[112] More broadly, Burkina Faso's Ministry of Development of the Digital Economy and Posts supports women's associations that offer IT training for entrepreneurs.

In addition to the initiatives described above, women entrepreneurs from some of the countries monitored in this report, such as Senegal and Uganda have benefited from Masterclasses organized by UNCTAD through the eTrade for Women programme in 2020.

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108 See https://www.molhr.gov.bt/molhr/?p=4730

109 See https://www.thedevchampion.com/fr/

110 See http://cyeaward.com/

111 See http://innovup.fefa.tg/renforcement-des-competences-entrepreneuriales/

112 See http://technovationcambodia.com/?page_id=124

Box 9   Empowering women digital entrepreneurs through the eTrade for Women programme

eTrade for Women is one of the spin-off programmes of the eTrade for all partnership. This initiative, launched in 2019, aims at enabling and empowering women digital entrepreneurs to become credible contributors to more inclusive development and wealth creation in their countries and regions. The initiative works with a network of regional advocates, namely successful women digital entrepreneurs who have been appointed based on their track record and willingness to inspire other women in e-commerce. The regional advocates contribute to leading regional masterclasses, two-day empowerment events that equip a new generation of women entrepreneurs in developing countries and LDCs with the tools to grow their activities and make their voices heard in the digital economy and the public policy realm. The Masterclasses include a significant capacity-building component. Training sessions, which are designed to address each region's specific digital environment, include specific digital skills such as search engine optimization, growing user bases, social media advertising, sales and negotiations, and turning data into intelligence for business growth.

Four advocates have hosted Masterclasses at this point. The first took place in North Macedonia in October 2019 with Nina Angelovska, digital entrepreneur and current Minister of Finance of North Macedonia. It took place with more than 40 participants from the country and whole Western Balkan region.

The second was led by Patricia Zoundi Yao from Côte d'Ivoire who led the Masterclass in Abidjan under the theme "Reinforcing competencies of female digital entrepreneurs". This Masterclass was complemented with a policy dialogue that identified three main challenges: problems of Internet connectivity and access, understanding of digital technology in terms of challenges and opportunities for the population, and the lack of funding for digital ventures developed by women.

As a result of the connections established during the Masterclass, two entrepreneurs in the francophone community formed a cross-border partnership. An entrepreneur who develops business websites in Benin has agreed to integrate the payment solution of a fellow participant from Senegal. This collaboration allows the Senegalese entrepreneur to expand her customer base in Benin and give the Beninese entrepreneur an additional source of income each time one of her clients use the payment solution from Senegal.

The third Masterclass took place virtually in July 2020 due to the COVID-19 pandemic with the theme "Making women thrive in the digital economy: Operating a more resilient business in times of crisis" for women entrepreneurs from East African countries and eTrade for Women advocate Clarisse Iribagiza. The capacity-building focus was on strengthening businesses to become ready for funding and create value propositions to sustain and eventually grow digital businesses.

The fourth eTrade for Women Masterclass has targeted the South-East Asia region and took place virtually, from 1 to 15 October 2020. It was delivered in partnership with Ms. Helianti Hilman, eTrade for Women Advocate and founder and Chairperson of Javara, Indonesia. The focus was on expanding participants' capacity to accelerate the digital transformation of their businesses and leverage digital tools to build more resilient companies, particularly in the context of the COVID-19 pandemic. Women-run digital businesses from Cambodia, Lao PDR and Myanmar, have benefited from this latest eMasterclass.

Source: UNCTAD

S5- Public sector capacity development

For a successful e-commerce environment, the digital skills of public sector employees need to be strengthened. In 2019, UNESCAP and the National Institute of Posts, Telecommunications and Information Communication Technology of Cambodia co-organized a national training of trainers on data-driven governance as part of the Academy of ICT Essentials for Government Leaders Programme. The aim was to improve the trainers' capacities on the role of data in governance and development to pass it on to Cambodia's civil servants.[113] Cambodia's Information Technology and Cyber Security Department also offers training on e-government trends for middle managers and on ICT strategy, management and security.[114]

Madagascar's government, together with the World Bank, launched the Digital Governance and Identification Management System Project PRODIGY, which aims to upgrade the national identity card system and improve public sector capacity in e-government services. One component to achieve these goals is to train civil servants to improve the provision of e-government services.[115]

Similarly, Uganda's National Information Technology Authority developed an e-Government curriculum guide to improve digital skills for public servants, for instance in web content management, to enhance communication in local government and ministries.[116] Furthermore, Uganda's Information Access Center, funded by the Republic of Korea in 2014, was revamped in 2019. It is a center of excellence for training civil servants on how to implement e-government services – and provides access to said services for the population.[117] The Digital Nepal Framework proposes a national e-learning platform for government employees to improve their capacity in digital skills.

Finally, The Senegal Ministry of Trade and SMEs organized a capacity-building workshop for Ministry officials on electronic commerce and the digital economy, in partnership with the Multinational Higher School of Telecommunications (ESMT) of Dakar, in April 2020. Similar initiatives should be extended to other line ministries for more impact.

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[113] See https://www.unapcict.org/news/cambodia-national-training-trainers-data-driven-governance

[114] See http://www.ucsb.gov.mm/en/?page_id=398

[115] Available at http://documents1.worldbank.org/curated/en/378581594176154460/pdf/Project-Information-Document-MG-Digital-Governance-and-Identification-Management-System-Project-PRODIGY-P169413.pdf

[116] See https://kalangala.go.ug/news/nita-u-training-web-content-management

[117] See https://chimpreports.com/revamped-korean-global-information-access-center-to-improve-government-service-delivery/

ACCESS TO FINANCING

E-commerce businesses are often relatively small, especially at the start-up stage, and have low levels of collateral. Therefore, access to financing can be an obstacle to growth, especially in the traditional banking sector. In the context of this monitoring exercise, all responding countries have identified lack of funding and access to financing as paramount challenges. A large number of these countries increasingly rely on private sector-led initiatives to provide access to financing for digital entrepreneurship initiatives. Overall, new financing opportunities, particularly through the banking system are missing, and women-run digital businesses are even more disadvantaged. The overall implementation rate combining all 13 countries' implemented recommendations in this policy area is 35 per cent (see Figure 14).

Figure 14 Number of implemented recommendations by country and thematic item under policy area "Access to financing"
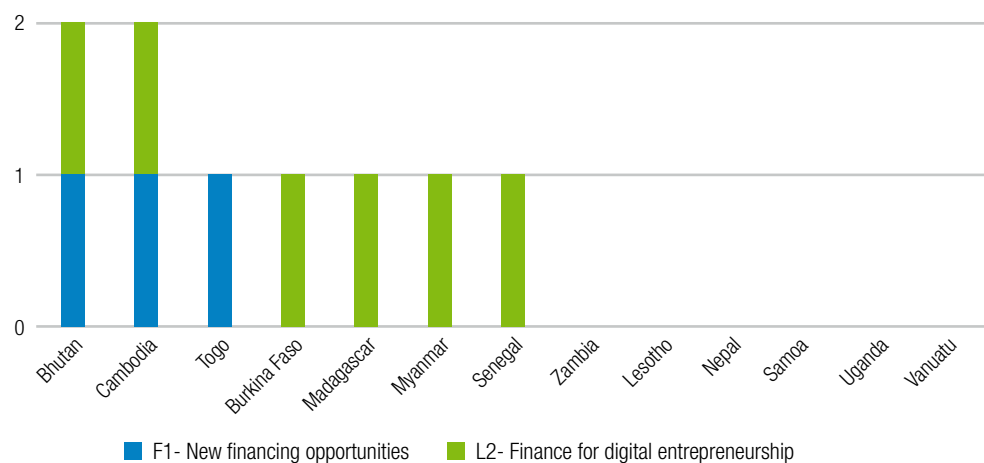
Source: UNCTAD

F1- New financing opportunities

In a few countries, new lending facilities and supportive business laws can be an opportunity for e-commerce businesses. The Small and Medium Enterprise Bank of Cambodia (SME Bank) was established in April 2020. It is an "SME co-financing project" of the SME Bank and 23 commercial banks, two specialized banks and seven MFIs. This collaboration aims to finance business expansions of currently small actors.[118] Bhutan introduced the National Cottage and Small Industries Bank in early March 2020. While it does not specifically target e-commerce businesses, it has an export financing component of up to Nu 10 million ($133,000), which predecessor banks did not have and could be attractive to e-commerce.[119]

Togo is embracing leasing as a new means of financing for SMEs. In this regard, the parliament adopted a law in June 2019 that is part of a larger regional project, which aims to make the laws on leasing uniform across WAEMU member states.[120] In line with this, Africa Lease Togo, a firm that buys assets in the name of a firm to then rents them to said business, started operating in

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[118] See https://www.phnompenhpost.com/business/sme-bank-officially-launched

[119] See http://www.bbs.bt/news/?p=128741

[120] See http://finances.gouv.tg/node/581

Togo in 2019.[121] In Senegal, the Rapid Entrepreneurship Delegation for Youth and Women (DER), is a funding structure to promote the emergence of national champions in promising sectors for the Senegalese and sub-regional economy, especially those relating to digital. To this end, the DER provided financial support to Senegalese start-ups, e.g., to the project Jaayma Mburu ("sell me bread" in local Wolof language), featuring an application developed in response to the COVID-19 pandemic guidelines to avoid public gatherings in shops, allowing customers to buy bread from local bakeries and have it delivered at home.

Going forward, Myanmar is considering a priority project to introduce a MSME business registry. One of the stated advantages could be to ease access to loans through improved formalization of the businesses. Similarly, financial and digital literacy for SMEs to strengthen capacity for a loan and financial management for business growth has been indicated by Nepal as one the areas where further support is needed.

F2- Finance for digital entrepreneurship

Start-up incubators, that combine financial support and entrepreneurship training, have gained traction in many of the reviewed countries. The public sector has taken the lead in Bhutan and Madagascar. Bhutan's Ministry of Economic Affairs launched its Startup Center in June 2018. It aims to support founders in fully developing business ideas to diversify the economy.[122] Earlier in 2020, Madagascar introduced a government-initiated programme, Fihariana, to support entrepreneurship. The programme offers loans in the range of MGA 200,000 to 200 million ($50 to $5,000). In addition to the loan, selected candidates receive training in entrepreneurial development, business management and financial literacy to improve the enterprises' chances of success.[123]

In a few countries private sector led initiatives are scaling up. In 2019, BeoogoLab in Burkina Faso started the initiative "Les graines du e-commerce burkinabè" to accompany selected projects from their initial project development phase until they find outside financing, specifically targeting e-commerce ideas.[124] In Cambodia three investment funds with venture capital – Smart Axiata Innovation Fund, Ooctane Fund, and 500 Startups – have begun financing digital companies and start-ups in the past two years. Together they have invested more than $60 million in Cambodian start-ups.[125] While commercial banks still provide limited financing to e-commerce businesses, Myanmar has an early seed investment programme, Phandeeyar, which combines business accelerator with training in finance, PR, marketing and business strategy, plus mentoring for the founders.[126] Additionally, two venture capital firms, Seed Myanmar and Delta Capital Myanmar, invest in the sector. Senegal's OrangeFab start-up accelerator had to adapt due to the global COVID-19 pandemic. Its fifth cohort of entrepreneurs is to date supported virtually.

Togo and Zambia both strive for a better incubator and accelerator infrastructure as a priority in their e-commerce development plans. Therefore, developing these entrepreneurial hubs with investors and development partners to strengthen capacity of these entities has emerged as priority projects for both countries, in the context of this monitoring exercise. This should improve start-ups' attractiveness to venture capital firms and consequently diversify funding opportunities, and at the same time help to meet the specific gender-based challenges that put women-led e-commerce businesses at a disadvantage when trying to access financing opportunities.

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[121] See https://www.financialafrik.com/2020/02/06/african-lease-togo-augmente-son-capital/

[122] See https://www.livemint.com/mint-lounge/features/kickstarting-made-in-bhutan-11570792751047.html

[123] See https://fihariana.com/

[124] See https://www.burkina24.com/2019/02/05/burkina-beoogolab-seme-les-graines-du-e-commerce/

[125] See https://www.ooctane.com/; https://sadif.com.kh/; https://english.cambodiadaily.com/business/500-startups-backs-cambodian-property-platform-khmerhome-coms-seed-round-137559/

[126] See https://accelerator.phandeeyar.org/

Box 10   Gender-based financing gap in innovation

The gender gap is not limited to access to finance in support of entrepreneurial innovations, which is common for all entrepreneurs regardless of their gender. Innovation is increasingly considered critical to economic development and key to achieving the Sustainable Development Goals. To successfully address these challenges, entrepreneurs require funding. However, there are vast disparities in access to financing that a start-up can benefit from. These disparities are not just based on geography, but also gender is a decisive factor.

Recent research finds that female-led startups tend to outperform male-led ones in terms of generating higher revenue per dollar invested – 78 cents in comparison with 31 cents for male-led startups. Nevertheless, women-led start-ups receive significantly less funding than those with all-male founders. In 2018, only one-tenth of seed financing in emerging markets went to a start-up with a woman in the founding team and only five per cent of later-stage venture capital went to female-led start-ups.

This disparity is remarkable because female-led start-ups are as likely as male-led ones to try and raise equity capital after undergoing an accelerator programme, a recent International Finance Corporation analysis of a sample of more than 2,000 start-ups that applied to accelerators finds. Nevertheless, male-led start-ups that participated in such a programme raised three times more equity than female-led participants. The gender financing gap between male- and female-led start-ups grew post-acceleration in comparison with start-ups that had applied but did not participate in the programme. In the year following acceleration, women-led start-ups raise 2.6 times less than their male counterparts, widening the gap in comparison to non-participating male- and female-led start-ups, where the gender financing gap amounted to 2.2 times less equity raised by women. This widening gap is driven by male-led startups experiencing a greater increase in their ability to raise equity in contrast to women-led start-ups, which remained on the same trajectory for raising equity than their non-accelerated female counterparts.

However, after undergoing an accelerator programme, female-led start-ups improved their ability to raise debt. They could not close the gender financing gap in debt raised, but in contrast to equity, the gap did not increase. Male-led start-ups did not experience a change in their ability to raise debt. While closing the gender financing gap to some extent, this finding indicates that female-led start-ups require this additional signal obtained through acceleration to become more credible to lenders.

These differences in access to financing between women and men cannot be explained by founder or business characteristics. All of them had similar levels of experience, education and age. Nor did regional or sector breakdown explain these disparities. Consequently, explanations for this disparity are investor bias or risk that is perceived higher for investments in female-led start-ups.

More work in this domain remains to be done: the study did not find any explanation in the set-up of the accelerator programme that could explain the persistent, and partially growing, gender financing gap after acceleration.

To address the financing gap more effectively, investor bias has to be mitigated intentionally, perceptions of risks in investing in female-led startups need to be reduced, and finally, investor behavior needs to be shaped such that their decisions become more rational towards female-led start-ups. Bridging the gender financing gap overall not only makes business sense in terms of returns on investment, but also to broaden the opportunities to address remaining development challenges.

Source: International Finance Corporation (2020). Venture Capital and the Gender Financing Gap: The Role of Accelerators. International Finance Cooperation. Washington, D.C.

Financing opportunities for firms depend on their visibility and network: events, awards and competitions play an important role. Nine of the reviewed countries are part of the Seedstars World Competition, which selects promising early-stage start-ups to be trained to develop their pitch. The winner then receives up to $500,000 in equity investment. On a more regional scale, the Mekong Business Challenge and the ASEAN Rice Bowl are two entrepreneurship competitions that provide a platform to launch digital businesses.[127]

Broadening cross-border ties was the aim of the Bhutan-India Start-up Summit in winter 2020. The summit included a start-up pitching contest and networking opportunities for Bhutan's start-ups. Togo's last International Fair of Lomé was organized around the theme of e-commerce.

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[127] See https://zico.group/law/cambodia-hosts-the-13th-annual-mekong-business-challenge/

KEY FINDINGS, MAIN CHALLENGES AND GAPS IDENTIFIED TO FAST-TRACK eT READY IMPLEMENTATION

The overall implementation rate in the countries included in the monitoring exercise is equal to 50 per cent. This value takes into account the analytical results and further research conducted by UNCTAD on the basis of questionnaires received by 13 countries and scored according to the number of recommendations being implemented in the relevant seven policy areas covered in the report. Additional information on other eT Ready beneficiary countries included in the report have been gathered through desk research and interviews but was not included in the scored performance assessment (see Methodology). An overall look at the number of actions taken by the responding countries to implement key recommendations of their eT Readies in Figure 15 sheds light on how they have performed in the seven policy areas, considering that these have been further broken down into a total of 26 thematic items dealt with in the eTrade Readiness Assessments.

Figure 15   Number of implemented recommendations by country and policy area

Legend:
- E-commerce readiness and strategy formulation
- ICT infrastructure and services
- Trade facilitation and logistics
- Legal and regulatory framework
- Payment solutions
- Skills development
- Access to financing
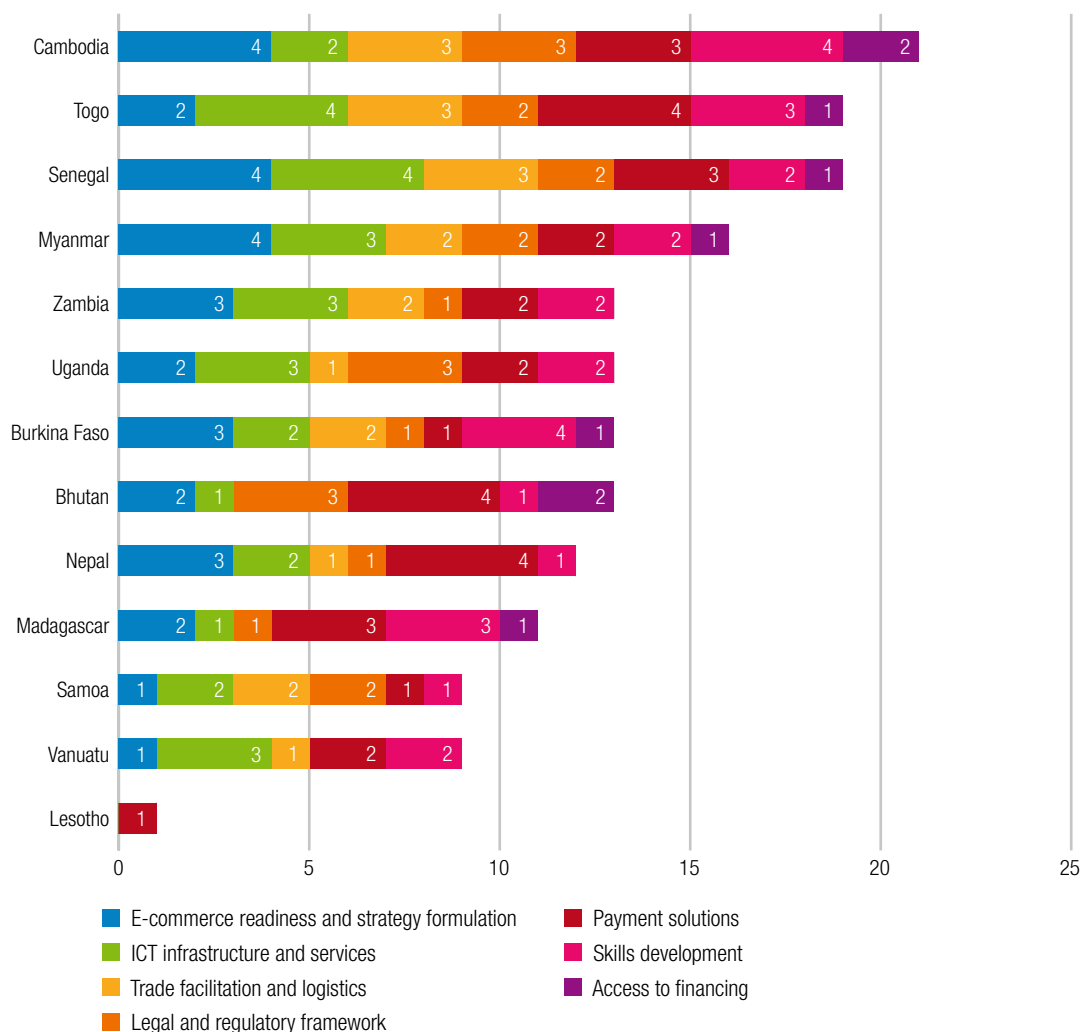
Source: UNCTAD

The number of actions taken by countries and documented in the report, marked in Annex 1, leads to different levels of eT Ready recommendations' implementation rates as per Figure 16. Several factors have played a role in either the overall countries' participation to this monitoring exercise (quantity of responses), or the eT Ready recommendations' implementation rates at the country level (quality of responses), or both, as highlighted in the lessons learned below.

Figure 16 Total implementation rate by country
(Percentage)
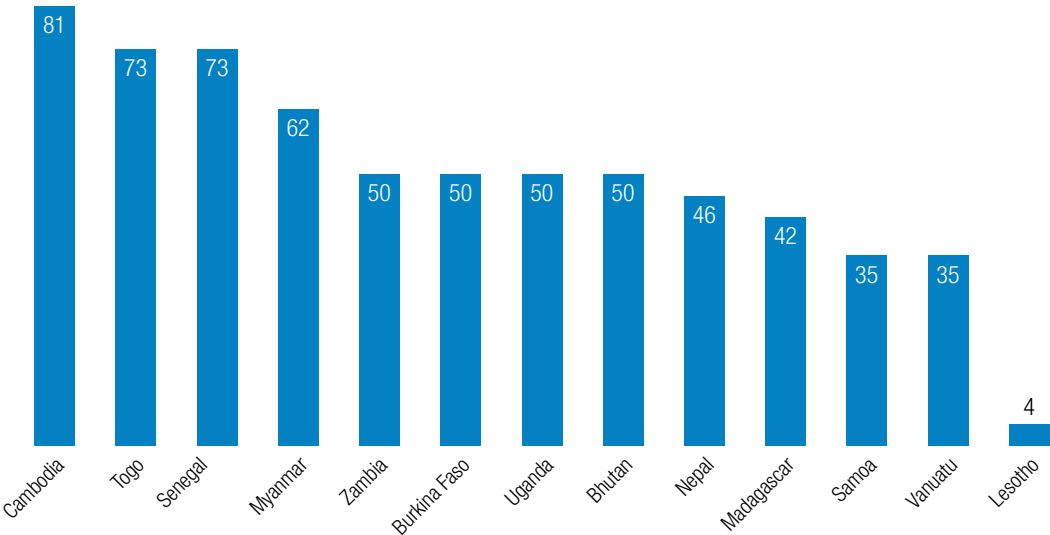
Source: UNCTAD

In absolute terms, countries have been most active in undertaking steps to address gaps in the area of payments solutions, as per Figure 17.

Figure 17 Total number of recommendations implemented by policy area across all countries
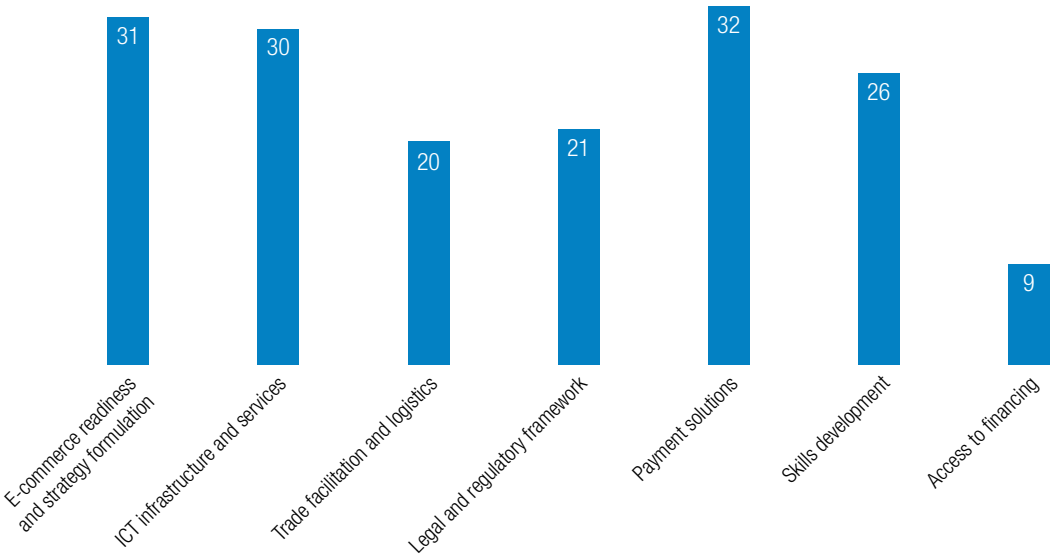
Source: UNCTAD

This is also reflected in the implementation rate by policy area, which takes into account the implementation of recommendations in relative terms, namely the percentage of total actions undertaken by countries vis-à-vis the whole set of implementable recommendations. Figure 18 highlights payment solutions as the policy area that has caught the higher level of attention by countries, compared to other policy areas, followed by ICT infrastructure and services. Together with the legal and regulatory framework, as well as trade facilitation and logistics, these policy areas feature an implementation rate above 50 percent. Access to financing remains a very critical bottleneck, particularly for Micro-, Small- and Medium-Size Enterprises (MSMEs) in LDCs, and this is further exacerbated by a gender-based financing innovation gap. Overall progress on implementation to improve countries' e-commerce readiness and strategy formulation stands at 48 per cent.

Figure 18   Implementation rate by policy area across all countries
               (Percentage)
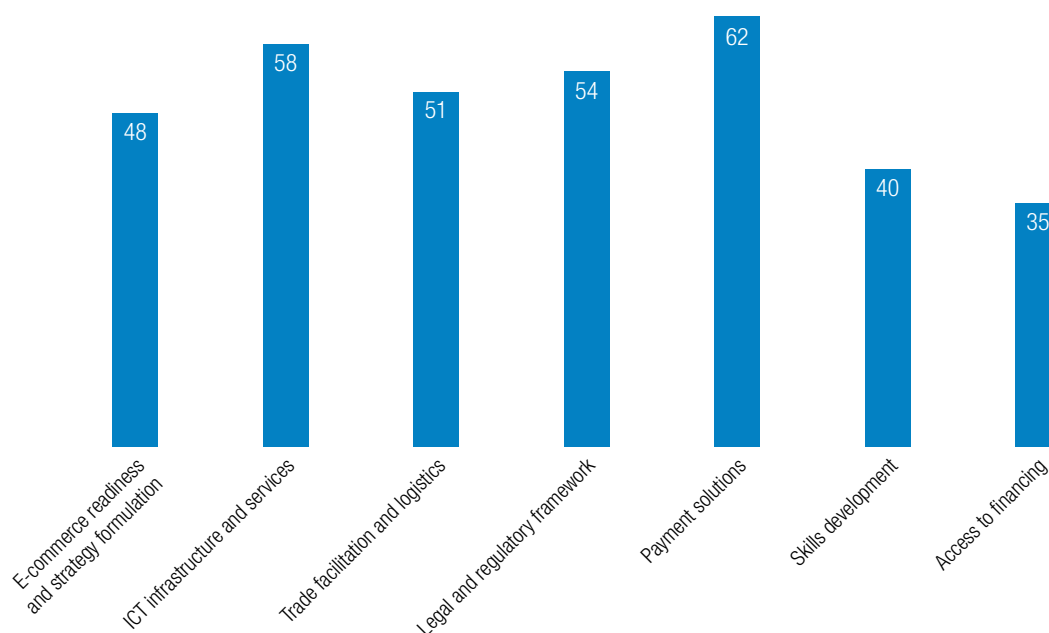
Source: UNCTAD

**The eT Ready recommendations remain relevant and projects' prioritization proposed by the countries under review are aligned with the eT Ready recommendations.** The monitoring exercise finds that countries still recognize their eT Ready Assessments as a valuable strategic decision-making tool. Furthermore, countries still find their Action Matrix to be an up-to-date compass in support of prioritizing e-commerce sector development efforts. Countries that have developed national e-commerce strategies have, on the one hand, implemented a key eT Ready recommendation and, on the other hand, integrated eT Ready findings and recommendations in the strategy action plans, as it has been the case in Cambodia, Myanmar, Nepal, and Senegal. Based on the eT Ready Action Matrix, the countries under review have identified a number of priority project in the seven different eTrade for all policy areas, summarized in Table 2.

Table 2   Overview of countries' priority projects and targeted eTrade for all policy areas

| Country	Priority projects	Policy areas
Bhutan	• National e-commerce strategy • Institutional development • National capacity development for the digital economy	• Strategy • Skills
Burkina Faso	• National e-commerce strategy • Support programme for the creation and/or upgrading of e-commerce and e-payment platforms • Information, education and awareness programme for e-commerce	• Strategy • ICT infrastructure and services • E-payments • Skills
Lesotho	• National policy and implementation strategy for e-commerce • Bridge the rural areas' digital divide and expand 4G accessibility and affordability • Strengthen the operational capability of Lesotho Postal Services using the Operational Readiness for e-Commerce (ORE Methodology)	• Strategy • ICT infrastructure and services • Logistics
Myanmar	• Update e-commerce regulatory framework • Pilot project on MSMEs registration system • ICT Infrastructure and Services Development Project based on a PPP commercial model • E-commerce skills development project (skills gap analysis, curricula development and on-the-job trainings)	• Legal • ICT infrastructure and services • Skills • Access to financing
Nepal	• Development of a physical addressing system • Capacity-building of Government officials and private sector on privacy and consumer protection, fraud protection measures, law drafting • Financial and digital literacy capacity-building for SMEs to improve loan and financial management for business growth	• Logistics • Legal • Skills • Access to financing
Samoa	• National e-commerce strategy • Development of an e-payment tool for international transactions • Postal system development through national street addressing	• Strategy • E-payments • Logistics
Senegal	• Revamp the ICT survey methodology to include statistics on e-commerce transactions and run the survey • Run an information, education and awareness campaign on the benefits of e-commerce • Strengthen regional cooperation on interoperability of financial services and allow cross-border e-payments from different networks	• Strategy • Skills • E-payments
Togo	• National e-commerce strategy • Support establishment of incubators and accelerators to foster digital innovation uptake across SMEs • Establish an intelligence unit to monitor new logistics solutions	• Strategy • Skills • Logistics • Access to financing
Uganda	• Products and enterprises statistical database	• Strategy
Zambia	• Completion of the National Addressing and Postal Coding Project • Facilitate partnership between local hubs, incubators, accelerators and development partners as well as investors • Conduct an e-commerce skills gap analysis	• Logistics • Skills • Access to financing

Source: UNCTAD

However, funding shortages are slowing down the implementation of eT Ready recommendations. Countries cite different reasons to explain below-expectations performance in implementing eT Ready recommendations (see Figure 19). The lack or unavailability of sufficient financial resources is reported as one of the most recurrent and common reasons explaining low implementation levels, in each policy area with minor variations. One notable exception is represented by Cambodia that has been capable to attract a good degree of development partner's support to spearhead eT Ready implementation, including from UNDP, the EIF and Australia (through the Department of Foreign Affairs and Trade).

Figure 19 Number of countries listing insufficient funding to be a reason or not for low implementation progress in the different policy areas
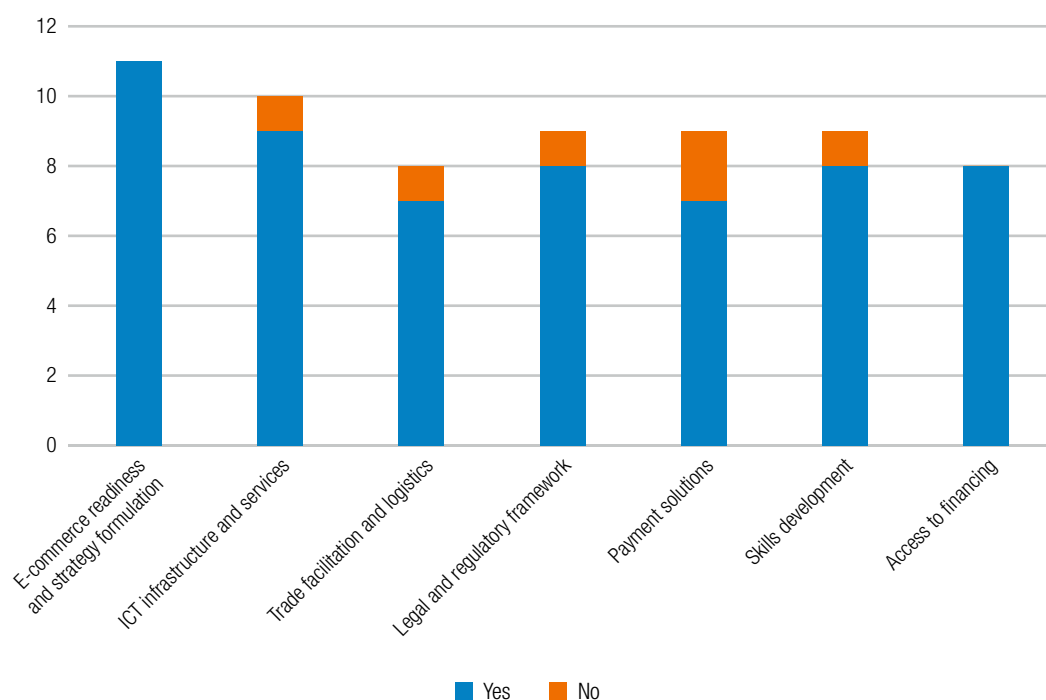
Source: UNCTAD

There is certainly great potential to scale up support by making better use of the eTrade for all partnership. About half of the countries reviewed have taken a proactive approach to engaging with development partners in order to raise awareness of the additional support needed to implement eT Ready recommendations, in addition to already ongoing projects. Notable initiatives are:

- In Bhutan, the e-Commerce Policy was developed with assistance from the EIF. The World Bank had shown interest in further collaboration and supports the Government in the implementation of the eT Ready;

- In Cambodia, development partners were convened with UNDP support at the workshop "#ConnectCambodia: Unlocking Opportunities in E-Trade" held on 16 November 2018, with participation from public and private sector and development partners;

- In Madagascar, the projects to be implemented for e-commerce development are part of development partners' programmes, in particular the World Bank's PRODIGY project, and the European Union's PADEIR project;

- Myanmar, together with the eT Ready national launch on 30 October 2018, organized a donor roundtable with eTrade for all partners and resident donors;

- In Nepal, the Ministry of Industry Commerce and Supplies organized a development partners' roundtable in January 2020, in which the Ministry briefed participants about the recently approved strategy;

- In Togo, a roundtable was held in October 2019 with a delegation from the EU, representatives from the Ministry of Trade, the Digital Economy Ministry and the EIF to look for funding for the national e-commerce strategy; and

- In Zambia, the Government through the Cabinet Office has engaged with the World Bank on a Digital Zambia programme and through the Ministry of Transport and Communications with USAID on the development of strategies for broadband infrastructure.

However, a closer look at each of the seven policy areas with regard to countries' engagement with eTrade for all partners indicates that there is untapped potential to mobilize further support, as shown in Figure 20.

Figure 20 Number of countries that have contacted/not contacted eTrade for all partners to gauge their interest in supporting implementation of the eT Ready action matrix
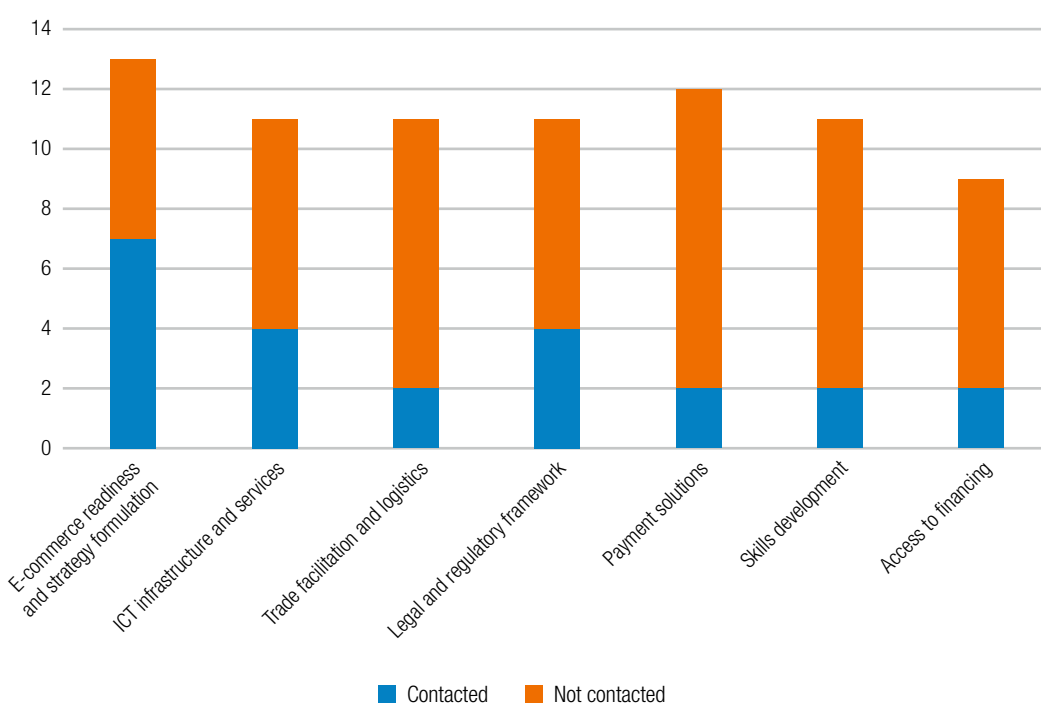
Source: UNCTAD

Apart from the strategy policy area, where there has been a relatively high level of proactivity in approaching eTrade for all partners, other policy areas have seen a weak commitment by countries to fully take advantage of the potential offered by this partnership platform.

Country experiences suggest that partnerships between beneficiary countries, the private sector and development partners can help spearhead reforms and investments, also in times of crisis. The success of multi-stakeholders' partnerships seeking to translate eT Ready recommendations into action for greater policy impact have already been recorded by UNCTAD.[128] In the context of this monitoring exercise, it has been noted how the EIF has supported the preparation of national e-commerce strategies in Cambodia, Myanmar and Senegal, which emerged as an outcome of the eT Ready process initiated through dialogue between governments and development partners. The United Nations Commission on International Trade Law (UNCITRAL)

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[128] See https://etradeforall.org/app/uploads/2019/09/E_Brochure_Policy-Impact-Note_FINAL_juin19.pdf

is providing support to Afghanistan in drafting e-commerce laws and collaborates with UNESCAP to carry out trade facilitation readiness assessments. In Cambodia and Myanmar, the EIF is further supporting more comprehensive projects, the Go4eCam and M-STEP, with significant e-commerce capacity-building components. UNDP[129] is also actively stepping in to provide e-commerce and digital economy support. In Uganda, UNDP is leading technical discussions with the Ministry of Industry, Trade and Cooperatives to support development of an e-commerce strategy. In Senegal, it is supporting the update and implementation of the Senegalese national digital economy strategy (Stratégie Sénégal numérique 2025). Other eTrade for all partners, such as the ITC and the World Bank are active in various countries with a range of programmes benefiting different areas of the e-commerce and broader digital economy ecosystem. Two most recent eTrade Readiness Assessments conducted in developing countries, such as Ivory Coast and Iraq, have been jointly carried out with ITC, the UPU and Consumers International to tap into their respective technical expertise in areas where eT Ready beneficiary countries have stressed a more vigorous interest for the assessment.

Box 11   The eTrade for all partnership: Successful performance for greater policy impact

A recent independent evaluation and an UN-mandated performance assessment have highlighted the contribution of the eTrade for all initiative as a positive example of interagency co-operation, building on the principles of complementarity and comparative advantage. The evaluation highlighted the role UNCTAD plays as a neutral broker in bringing together approximately 30 agencies on a market platform. It allows requesters to see which partner is the most relevant for them, encourages transparency between the agencies about their areas of specialization and areas of alignment, and reduces duplication. The coordination efforts of the initiative allow silos to be broken within and between the partnering organizations. The regular involvement of partners in UNCTAD's eCommerce Weeks, their joint engagement in delivering the eTrade for all indicators and the benefits in widening partners programmes' geographic scope have all been recognized as key success factors for this type of joint venture. Furthermore, due to its holistic nature, gender is treated as a cross-cutting element along the seven policy areas. There is a growing consensus that as a result of the momentum created by this partnership and its two spin-off programmes, the eTrade Readiness Assessment and eTrade for Women, e-commerce starts to be recognized as a driver for development.[130] Launched in July 2016, during the 14th session of United Nations Conference on Trade and Development (UNCTAD 14), the eTrade for all family is constantly growing, with two additional members onboarded before the partnership's fourth anniversary. The International Labour Organization and the Commonwealth Secretariat officially joined in June 2020, bringing the total number of partners to 32.[131]

Source: UNCTAD

These partnerships can also provide scalable models for ready-to-use public-private cooperation in times of crisis, as has been the case during the COVID-19 pandemic. In Cambodia, UNDP has rapidly looked at e-commerce in its COVID-19 crisis response, working towards boosting local retailer and consumer logistics by reskilling workers, while using idle capacity within the local transportation network of tuk-tuks and in the hospitality industry.[132] United Nations Capital Development Fund (UNCDF) launched its digital strategy in 2019 to promote inclusive digital

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[129]   Not yet an official eTrade for all partner, but the membership application is being processed.

[130]   See https://etradeforall.org/year-in-review-2019-2020/

[131]   See https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=2419

[132]   See https://unctad.org/en/pages/newsdetails.aspx?OriginalVersionID=2401

economies, specifically in LDCs. Under this programme, scalable partnerships have been established between informal market operators and the local motorbike taxi platform SafeBoda in the COVID-19 crisis response.[133] Also in Uganda, UNDP with the African e-commerce marketplace Jumia have tried similar innovative cooperation models with the private sector to support food and grocery deliveries by onboarding new informal operators.[134]

Countries are spelling out the need for assistance to translate priority projects into fully-fledged proposals. Donors are keen in having eT Ready recommendations implemented, and the message was stressed once more during UNCTAD eCommerce Week in 2019.[135] In response to this growing interest, UNCTAD has refined the methodology for new eT Readies to include more concrete actions to facilitate eT Ready follow-up. The Tunisia eT Ready now includes an Action Plan with targets, timelines and project priorities. In Jordan, GIZ wants to fund the strategy immediately after the eT Ready scheduled in 2020-2021. The monitoring exercise has highlighted a clear need for support to prepare bankable projects to attract higher levels of development partners' assistance (see Figure 21).

Figure 21   Number of countries in need or not of assistance to prepare project proposals to submit to donors

Source: UNCTAD   ■ In need   ■ Not in need
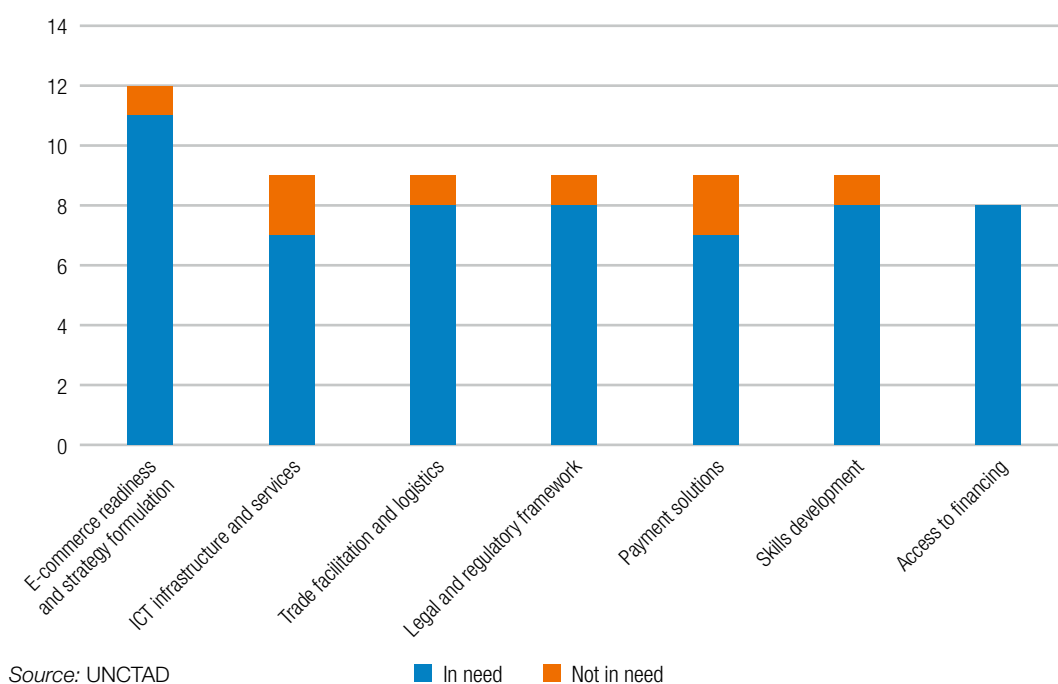
This is true across all policy areas, but at the same time, as highlighted by some countries, technical assistance should be matched by effective project leads in the country line ministries' departments. This means that capacity-building of governments also remains equally important.

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[133] This partnership provides an e-commerce platform that will connect market vendors to customers during the ongoing COVID-19 lockdown and beyond. Targeting an initial 800 market vendors, the SafeBoda e-commerce platform will connect market vendors to households that need a range of supplies by using the preexisting reliable SafeBoda transport service. More at https://www.uncdf.org/article/5664/uncdf-and-safeboda-partnership-looks-to-support-last-mile-finance-beyond-covid-19

[134] See https://www.ug.undp.org/content/uganda/en/home/presscenter/pressreleases/2020/covid-19--undp--jumia-uganda-partner-to-link-market-vendors-with.html

[135] Particularly during the Stock-taking Workshop on Lessons Learned and Best Practices for the Conduct and Implementation of the rapid eTrade Readiness Assessments". Main conclusions are reported in the eCommerce Week Summary Report, available at https://unctad.org/meetings/en/SessionalDocuments/dtl_eWeek2019_summary_en.pdf

LESSONS LEARNED FROM THE MONITORING EXERCISE

The monitoring exercise built on the stock-taking workshop organized during the 2019 UNCTAD eCommerce Week in Geneva. The workshop highlighted the need for a more comprehensive review of progress and achievements in implementing eT Ready Action Matrix recommendations and to fast-track implementation. For this, UNCTAD was able to dedicate resources, with the support from Germany's Federal Ministry of Economic Cooperation and Development (BMZ), to design and implement a monitoring strategy. A questionnaire was designed, incorporating feedback from a test phase with eT Ready Focal Points from selected country. At the end of February 2020, the questionnaire was shared with the 18 countries that had benefited from an eTrade Readiness Assessment by June 2019. In parallel, the monitoring strategy engaged with eTrade for all partners to assess ongoing country-level initiatives in the seven policy areas, which are the building blocks of the eTrade for all partnership. In addition, attempts have been made to mobilize UN Country Teams and contacts were established through UN Resident Coordinators Offices. Based on these steps, there are some main lessons learned to highlight.

Quantity of responses and countries' engagement. Thirteen out of the 18 countries responded to the questionnaire and submitted a response. This shows that in most cases the process initiated with the eTrade Readiness Assessment remains relevant and there is enough political and technical leadership to ensure proper follow-up on recommendations. This is also confirmed by the project prioritization exercise presented in the previous chapter that, although at a very conceptual stage, indicates that a sufficient level of capacity is present to build a resources mobilization strategy. For the remaining five countries, it was not possible to receive the requested feedback despite several attempts. Main bottlenecks for country responses relate to a range of factors resulting from weak institutional capacities and not well-structured policy coordination mechanisms to ensure adequate eT Ready follow-up at the national level:

a. eT Ready Focal Point at the time of the assessment is no longer on post and a replacement/ hand-over of the eT Ready follow-up was not successful;

b. eT Ready Focal Point comes from the private sector and has weak leverage across government agencies to raise interest in the eT Ready follow up processes;

c. eT Ready Focal Point faces hurdles in mobilizing line ministries and agencies to ensure a comprehensive response covering the seven policy areas. This was the case, among others, in Lao PDR, where the Focal Point within the Ministry of Industry and Commerce has not managed to ensure proper mobilization of internal and external stakeholders for this exercise, confirming the need for stronger leadership by the Ministry to lead the e-commerce development agenda;[136]

d. e-commerce is not sufficiently prioritized in the national development agenda; resources and responsibilities are not efficiently allocated to support e-commerce sector development.

Better interministerial coordination would have significantly enhanced a more efficient data collection process, as it has become clear that eT Ready Focal Points have in some cases struggled to obtain the requested information on time. In other cases, the requested inputs were not provided, negatively affecting the country's eT Ready implementation performance assessment score. The outbreak of the COVID-19 pandemic also significantly slowed down and delayed the process necessary to organize country responses. To alleviate these difficulties, the initial timeframe to collect feedback was extended until 30 June 2020. Countries' Permanent Missions in Geneva have also been instrumental in ensuring proper follow-up in capitals.

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[136] Previous analysis from the World Bank has also highlighted similar capacity constraints, see http://documents1. worldbank.org/curated/en/318431534860299926/pdf/Taking-Advantage-of-E-Commerce-Legal-Regulatory-and-Trade-Facilitation-Priorities-for-Lao-PDR.pdf

Quality of the responses. The level of exhaustiveness of the feedback provided in the questionnaires submitted by countries significantly varies. In some cases, the first draft submitted could be improved by involving other stakeholders (e.g., line ministries, government agencies) and successfully identifying new eT Ready Focal Points. In other cases, it was necessary to complement the information received with further research and/or online meetings for a more complete picture. It has to be pointed out that the respondents did not receive specific training on how best to respond, beside general instructions contained in the questionnaire and ad hoc advice provided at request. Further, countries have not put in place eT Ready monitoring structures, although there is increasing awareness about the need to have similar instances in place for national e-commerce strategies being developed, as noted earlier in the report. Having a resource properly trained and dedicated to manage and monitor the eT Ready process would greatly contribute to overall efforts geared towards better policy coordination and coherence, as inputs coming from regular monitoring of eT Ready implementation in the country will help policymakers to better identify persisting gaps. The eT Ready Focal Points continue to play a pivotal role in ensuring proper follow-up, considering the limited resources available.

Involvement of eTrade for all partners. The whole eT Ready programme, as a spin-off of the eTrade for all partnership, builds on successful engagement with the eTrade for all partners to foster successful implementation of eT Ready recommendations. Partners have been invited to complement the monitoring exercise at the country level, by providing up-to-date information about ongoing and planned activities in their respective policy areas. UNESCAP and UNCITRAL have provided useful information, and the countries themselves have shared information about ongoing support, which has been acknowledged in different sections of this report. The latest UNCTAD eWeek has also set the stage and enabled fruitful interactions among partners and, in turn, made a larger set of stakeholders aware of various ongoing initiatives. However, as pointed out in the previous chapter, there is still scope for countries to engage more with the eTrade for all partners. The same partners will gain from a more concerted holistic approach, building on this existing platform. This could help assess current needs, buildon the outcomes of this monitoring exercise, and in turn plan their e-commerce-related assistance in a more coordinated and transparent environment.

Cooperation with UN Resident Coordination Offices. To support implementation of eT Ready recommendations and ensure e-commerce is mainstreamed in national development assistance frameworks, the UNCTAD eT Ready Programme has initiated dialogue with a number of UN Resident Coordinator's Offices (RCOs). The objective is to i) assess ongoing and planned activities related to eT Ready recommendations in the seven policy areas, by the UN Country Team and the wider development partners' community on the ground, and ii) ensure that a consensus emerges on the need to scale up support and resources to fast-track implementation of eT Ready recommendations. This approach was first inaugurated during the stakeholders' mobilization phase of the eT Ready in Ivory Coast in March 2020, where, in addition to public-private sector consultations, a development partners' roundtable was organized in tandem with the UN RCO. In the context of this monitoring exercise, after a first round of contacts, two-way communication avenues have been established with RCOs and other members of the UN Country Team in Lao PDR, Senegal and Uganda. Initial contacts have also been pursued in Bangladesh and Samoa. The outbreak of the COVID-19 pandemic has, to a certain extent, prevented a higher response rate by the RCOs, as priority was given to emergency efforts. At the same time, the e-commerce and digital acceleration brought by the crisis has encouraged UN Country Teams to look at e-commerce, and the digital economy agenda more broadly, in the context of national development strategies with a renewed interest. In Uganda, UN agencies have been very active in fostering innovative crisis response initiatives building on e-commerce platforms, as mentioned in the previous chapter. In Lao PDR, e-commerce is fully integrated in discussions of the UN Country Team to formulate COVID-19 economic recovery plans, and UNCTAD is contributing by advocating for the need to strengthen national policy development mechanisms and governance of the e-commerce development agenda building on the eT Ready recommendations (see Box 12).

Box 12   Pooling Efforts in Lao PDR under the leadership of the UN Resident Coordinator Office

Lao PDR is landlocked LDC surrounded by larger – and for the most part wealthier – neighbors, but with a relatively narrow and undiversified economy and export base. Recognizing the opportunities that could be seized through closer integration into the regional and global economy, the Government has made heavy strategic investments in infrastructure to improve regional connectivity, with the goal of shifting from a landlocked to a land-linked country at the heart of the booming South East Asian economy. In line with this, development partners, including the UN, have aligned their support and investments to support improved regional integration, in particular by seizing the opportunities presented by growing digital capacity. For the UN, this effort cuts across the mandates of numerous agencies, funds, and programmes, and supporting it often requires specialized expertise based in regional and global hubs rather than deployed in-country.

In response to this, the UN Resident Coordinator Office has played a lead role in convening technical expertise from across the UN Development System, including the eTrade Readiness Assessment, to coordinate collective efforts to support the development of e-commerce. Starting in March 2020, the RCO began convening a series of virtual discussions among UNCT members working on support to Lao PDR's trade diversification agenda as an informal mechanism to share resources, plans, and identify ways forward. These discussions grew to include representatives from FAO, ILO, ITC, UNCDF, UNCITRAL, UNCTAD, UNDESA, UNDP, UNICEF, UNIDO, and the World Bank.

This approach was aimed at providing coordinated support to the inclusion of the e-commerce and digital transformation agenda into Government planning as part of the 9th National Socio-Economic Development Plan, as well as into the new UNCT Sustainable Development Cooperation Framework, both of which are currently under development. Furthermore, this also allowed for efficient inclusion of priorities to support the further development of e-commerce as part of the joint UN Socio-Economic Response Framework to COVID-19.

Source: UNCTAD (based on inputs received by the UN RCO in Lao PDR)

Building on this constructive engagement initiated in the above countries, there is certainly scope to further raise the profile of the eT Ready follow-up across RCOs in additional countries.

CONCLUSIONS AND RECOMMENDATIONS

This was the first-ever structured monitoring exercise conducted by UNCTAD to assess the level of implementation of policy recommendations contained in eT Readies conducted by June 2019. The analysis has shed light on the ongoing commitment of eT Ready beneficiary countries to translate recommendations into action. Since this commitment could not be taken for granted, the results of this report confirm the willingness of eT Ready beneficiary countries, particularly LDCs, to bridge the e-commerce divide building on their eT Readies' Action Matrix. They have also once more stressed the importance of scaling up partners' mobilization efforts and further tap into the potential of the eTrade for all partnership. The eTrade for all partners are playing an active role in ensuring the relevance of the eT Readies and alignment of the recommendations with their areas of intervention. In various fora, they have recognized the usefulness of the eT Readies in triggering inclusive processes at the country level to foster an enabling environment for e-commerce ecosystem and digital economy development.

The results of this report can provide a useful compass for governments, development partners and other committed stakeholders to guide investment decisions on where more support is needed to advance specific countries' e-commerce and digital economy development agendas. Many development partners have praised the usefulness of eTrade Readiness Assessments and UNCTAD remains committed and best suited to build consensus and mobilize the international community, first and foremost building on its confirmed convening power of the eTrade for all partnership.

Some limitations and bottlenecks encountered during this monitoring exercise have enabled drawing useful lessons to improve future efforts to monitor eT Ready activities, in line with the Monitoring and Evaluation Framework of UNCTAD E-Commerce and Digital Economy programme. To better monitor the quality of its e-commerce capacity-building programmes, UNCTAD plans from now on to collect structured feedback from eT Ready Focal Points after each eTrade Readiness Assessment and conduct a monitoring exercise focused on eT Ready implementation on a more regular basis.

The COVID-19 pandemic affected the process leading to this report through operational difficulties in conducting official activities as well as its dramatic and uneven impacts in the world economy. It has shown the importance of a working digital economy ecosystem to strengthen countries' economic and social resilience, powered by inclusive e-commerce business models and functionality of digital platforms. It has reminded the global community that more needs to be done to bridge the global digital divides in line with SDG targets, as urban/rural and gender-based disparities in access to ICTs remain significant.

Based on the results of this first eT Ready monitoring exercise, some important recommendations can be formulated. These complement a larger set of recommendations outlined in the context of the stock-taking survey on good practices for the preparation and implementation of the eT Readies, conducted by UNCTAD in 2019. The following recommendations are tailored to establishing a streamlined process that could make monitoring implementation of eT Ready recommendations easier for governments and development partners. These recommendations are addressed to i) national stakeholders in the eT Ready beneficiary countries, and ii) the broader development partners' community willing to support e-commerce and digital economy in developing countries, and LDCs in particular.

For countries that have benefited from an eT Ready:

a. **Adopt eT Ready recommendations** as part of a government strategy, policy or sector plan, with a clear accountability framework for implementation, which can be better achieved with a sound administrative or legal basis to support government action;

b. **Establish a steering committee under the leadership of the Ministry in charge of e-commerce development, led by an identified Focal Point,** to enhance policy coordination and provide strategic leadership in the eT Ready implementation agenda. An e-commerce committee/working group with a built-in interministerial coordination mechanism, chaired at the highest government level, can serve this purpose; the Steering committee should be entrusted with monitoring and data collection functions and resources, to keep track of implementation of eT Ready recommendations;

c. **Identify "champions" acting as liaison resource persons across different public and private sector entities to take part in the steering committee** and sensitize them to the strategic role of the eT Ready Action Matrix follow-up. The "champions" should be able to cover and represent the seven policy areas constituting the building blocks of the eT Ready;

d. **Translate the eT Ready Action Matrix into an Action Plan** detailing specific activities, implementing structures, concrete timelines, targets and budget, defining the government contribution and funding sought;

e. **Design a development partners' engagement strategy** to mobilize support for the seven policy areas of the eT Ready, and to use the eT Ready Action Matrix as a planning tool to mobilize stakeholders for project design.

For development partners:

a. **Make strategic use of the eT Ready** as a needs assessment tool and decision-making support to integrate e-commerce into their development assistance strategies;

b. **Plan country-specific technical and financial assistance** based on country priorities and solid analytical foundations provided by the eT Readies;

c. **Engage with other partners** under the umbrella of the eTrade for all partnership to organize coordinated actions and speak with governments with a harmonized approach, breaking down silos and ensuring greater synergies among like-minded partners offering most relevant solutions;

d. **Build on the enhanced role of UN Resident Coordinators** to mainstream development partners support for e-commerce and digital economy development into policy dialogue and development assistance frameworks in eT Ready beneficiary countries;

e. **Provide support to governments in costing activities and articulating bankable projects,** especially through capacity-building for leading government agencies and advisory services to coordinate an inclusive process leading to the formulation of sound project documents reflecting needs of governments, local stakeholders and beneficiaries, as well as donors.

Implementation of eT Readies' recommendations is moving at varying speed, with successful experiences from which other countries can learn. To avoid further widening existing digital divides, a coordinated response between governments in developing countries and LDCs with development partners, as well as greater public-private cooperation, are tremendously needed, now more than ever, to meet the persisting development challenges further aggravated by the peculiar pandemic-related concerns. The recommendations outlined in this report will serve as a guide for UNCTAD's further engagement with eT Ready beneficiary countries and development partners. Building on principles of country ownership, accountability and transparency, UNCTAD will continue to play a leading role in connecting the dots of the e-commerce ecosystem and breaking down silos among different stakeholders to help countries accelerate their digital transformation, by helping them monitor their advances, sharing good practices among different stakeholders, facilitating networking and mobilizing support to fast-track eT Ready implementation under the umbrella of the eTrade for all partnership.

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ANNEX 1: SCORED COUNTRIES' IMPLEMENTED RECOMMENDATIONS IN THE 26 THEMATIC ITEMS

Thematic items	Bhutan	Burkina Faso	Cambodia	Lesotho	Madagascar	Myanmar	Nepal	Samoa	Senegal	Togo	Uganda	Vanuatu	Zambia	Total
S1a- Strategy development (done or ongoing)	—	—	✓	—	—	✓	✓	—	✓	—	✓	—	✓	6
S1b- Strategy development (looking for support/expressed interest)														unscored
S2a- Policy coordination and dialogue (committees/working groups)	✓	✓	✓	—	—	✓	✓	✓	✓	—	—	✓	✓	9
S2b- Policy coordination and dialogue (e-commerce associations)	—	✓	—	—	✓	✓	—	—	✓	✓	—	—	—	5
S2c- Policy coordination and dialogue (eT Ready dissemination)														unscored
S2d- Policy coordination and dialogue (eT Ready monitoring)														unscored
S3- Availability of new e-government services	✓	✓	✓	—	✓	✓	✓	—	✓	✓	—	—	✓	9
S4- E-commerce statistics availability	—	—	✓	—	—	—	—	—	—	✓	—	—	—	2
Sub-total	**2**	**3**	**4**	**0**	**2**	**4**	**3**	**1**	**4**	**2**	**2**	**1**	**3**	**31**
I1- ICT infrastructure development	—	✓	✓	—	—	✓	✓	✓	✓	✓	✓	✓	✓	10
I2- Mobile Internet connectivity	✓	—	✓	—	✓	—	✓	—	✓	✓	✓	✓	—	8
I3- Internet affordability	—	—	—	—	—		—							7
I4- Access to electricity	—	✓	—	—	—	✓	—	—	✓	✓	—	—	✓	5
Sub-total	**1**	**2**	**2**	**0**	**1**	**3**	**2**	**2**	**4**	**4**	**3**	**3**	**3**	**30**
T1- Street addressing	—	✓	✓	—	—	✓	—	✓	✓	✓	✓	—	✓	8
T2- E-commerce logistics	—	✓	✓	—	—	✓	✓	—	✓	✓	—	—	✓	7
T3- Implementation of the Trade Facilitation Agreement	—	—	✓	—	—	—	—	✓	✓	✓	—	✓	—	5
Sub-total	**0**	**2**	**3**	**0**	**0**	**2**	**1**	**2**	**3**	**3**	**1**	**1**	**2**	**20**
L1- Regulatory review and gap analysis	✓	—	✓	—	—	✓	—	✓	—	—	✓	—	✓	6
L2- New laws and regulation initiatives	✓	—	✓	—	✓	—	✓	✓	✓	✓	✓	—	—	8
L3- Awareness and sensitization	✓	✓	✓	—	—	✓	—	—	✓	✓	✓	—	—	7
Sub-total	**3**	**1**	**3**	**0**	**1**	**2**	**1**	**2**	**2**	**2**	**3**	**0**	**1**	**21**

Thematic items	Respondent countries													Total
	Bhutan	Burkina Faso	Cambodia	Lesotho	Madagascar	Myanmar	Nepal	Samoa	Senegal	Togo	Uganda	Vanuatu	Zambia	
P1- Financial inclusion	✓	✓	—	✓	✓	✓	✓	—	✓	✓	—	✓	—	9
P2- Interoperability of e-payments	✓	—	✓	—	—	—	✓	—	—	✓	—	—	✓	5
P3- Trust in online transactions	✓	—	✓	—	✓	✓	✓	—	✓	✓	✓	✓	—	9
P4- New e-payment options and innovations	✓	—	✓	—	✓	—	✓	✓	✓	✓	✓	—	✓	9
Sub-total	**4**	**1**	**3**	**1**	**3**	**2**	**4**	**1**	**3**	**4**	**2**	**2**	**2**	**32**
S1- Skills gap review	—	—	✓	—	✓	—	—	—	—	✓	—	✓	—	4
S2- Education and training	—	✓	—	—	✓	✓	—	✓	—	✓	—	—	✓	6
S3- Digital innovation	✓	✓	✓	—	—	—	—	—	✓	—	✓	✓	—	6
S4- Gender-related capacity- building	—	✓	✓	—	—	✓	—	—	✓	✓	—	—	✓	6
S5- Public sector capacity development	—	—	✓	—	✓	—	✓	—	—	—	✓	—	—	4
Sub-total	**1**	**3**	**4**	**0**	**3**	**2**	**1**	**1**	**2**	**3**	**2**	**2**	**2**	**26**
F1- New financing opportunities	✓	—	✓	—	—	—	—	—	—	✓	—	—	—	3
F2- Finance for digital entrepreneurship	✓	✓	✓	—	✓	✓	—	—	✓	—	—	—	—	6
Sub-total	**2**	**1**	**2**	**0**	**1**	**1**	**0**	**0**	**1**	**1**	**0**	**0**	**0**	**9**
TOTAL	**13**	**13**	**21**	**1**	**11**	**16**	**12**	**9**	**19**	**19**	**13**	**9**	**13**	**169**