



UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

COVID-19 AND E-COMMERCE

**IMPACT ON BUSINESSES
AND POLICY RESPONSES**



UNITED NATIONS





UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

COVID-19 AND E-COMMERCE

**IMPACT ON BUSINESSES
AND POLICY RESPONSES**



UNITED NATIONS
Geneva, 2020

© 2020, United Nations

This work is available open access by complying with the Creative Commons licence created for intergovernmental organizations, available at <http://creativecommons.org/licenses/by/3.0/igo/>.

The findings, interpretations and conclusions expressed herein are those of the authors and do not necessarily reflect the views of the United Nations, its officials or Member States.

The designation employed and the presentation of material on any map in this work do not imply the expression of any opinion whatsoever on the part of the United Nations concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Photocopies and reproductions of excerpts are allowed with proper credits.

This publication has not been formally edited.

United Nations publication issued by the United Nations Conference on Trade and Development.

UNCTAD/DTL/STICT/2020/12

eISBN: 978-92-1-005536-9



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.

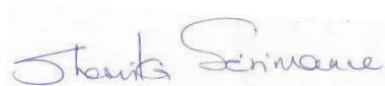
Preface

In both developed and developing countries, the COVID-19 crisis has led to an acceleration of digital transformations. Digital solutions are increasingly explored to continue some of the economic and social activities remotely. They have been critical for telemedicine, telework and online education, not least to keep alive our social ties in times of physical distancing. The COVID-19 crisis has boosted the uptake of ecommerce for both businesses and consumers in developing countries. Many consumers have replaced or complemented their physical shopping with online purchases. Such changes in consumer behavior are expected to remain even once the pandemic is over. However, the storytelling that the pandemic has favored e-commerce is simplistic. The pandemic has also further highlighted the significant digital divides that, unless adequately addressed, will lead to even greater inequalities.

The findings of this study “COVID-19 and e-commerce: Impact on businesses and policy responses” build on the results of a major survey of e-commerce businesses and national policy responses, conducted in 23 countries in Africa, Asia and the Pacific, 20 of which being least developed countries (LDCs). This effort provides valuable inputs into helping countries to improve their readiness to engage in and benefit from e-commerce, including in the context of Building Back Better. As UNCTAD has documented, especially in the eTrade Readiness Assessments conducted for 27 developing countries, there are significant gaps and barriers in their digital readiness. Most of the respondents to the survey presented in this study are based in countries that have benefitted from an eTrade Readiness Assessment. Some others have been involved in our eTrade for Women initiative or sought UNCTAD assistance in developing an e-commerce strategy.

This study sheds new light on how the pandemic has reinforced pre-existing bottlenecks in the ecommerce ecosystems. Successful initiatives at the country level, building on public-private cooperation, have been crucial in responding well to the COVID-19 crisis and limiting its adverse impacts. It also stresses the importance of mobilizing more international support and national commitment towards reforms, as well as investments, in certain policy areas. It showcases the policy measures that the private sector has found the most impactful to empower COVID-19 recovery strategies.

Digitalization will need to be given more attention in the development debate as we approach the 2030 deadline for the sustainable development goals and as we turn to the recovery phase. To ensure that we do the right things, we will need to build a solid knowledge base to assist countries in informing better policies. This study contributes to this end. UNCTAD, in cooperation with eTrade for all partners, will continue to support implementation of such recommendations as part of its E-Commerce and Digital Economy Programme (ECDE). In this context, I would like to thank the Government of Germany for its continuous support to this work programme, without which this study would not have been possible.



Shamika N. Sirimanne

Director, Division on Technology and Logistics

Table of contents

Note.....	iii
Preface	iv
List of Figures.....	vi
Acknowledgements.....	vii
Introduction.....	1
<i>Key findings.....</i>	<i>1</i>
<i>Methodology</i>	<i>4</i>
<i>Profiling respondents</i>	<i>5</i>
Impact on e-commerce businesses	9
<i>Overall sales trends</i>	<i>9</i>
<i>Most used sales channels by e-commerce companies.....</i>	<i>10</i>
<i>Variations in the composition of sales</i>	<i>11</i>
<i>Payment methods.....</i>	<i>12</i>
<i>Business outlook: impact on costs and workforce.....</i>	<i>13</i>
Challenges, business coping strategies and policy responses	15
<i>Main challenges encountered</i>	<i>15</i>
<i>Business facilitation measures: an overview.....</i>	<i>17</i>
<i>E-commerce business facilitation measures: examples from the public sector.....</i>	<i>19</i>
<i>Country highlights by policy area</i>	<i>21</i>
<i>Public-private cooperation and private sector initiatives</i>	<i>26</i>
<i>Financing.....</i>	<i>28</i>
Way forward	29
<i>Measures to support COVID-19 recovery plans through e-commerce development... 29</i>	
<i>Conclusions: UNCTAD support and eTrade for all partnership.....</i>	<i>31</i>



List of Figures

Figure 1	<i>Impact of COVID-19 crisis on monthly e-commerce sales (in per cent)</i>	2
Figure 2	<i>Top 10 most important measures taken during the COVID-19 crisis (in per cent)</i>	3
Figure 3	<i>Number of respondents per survey section</i>	5
Figure 4	<i>Number of respondents per country of e-commerce operation</i>	6
Figure 5	<i>Type of online business (in per cent)</i>	7
Figure 6	<i>Size of workforce (in per cent)</i>	7
Figure 7	<i>Impact of COVID-19 crisis on monthly e-commerce sales (in per cent)</i>	9
Figure 8	<i>Third-party marketplaces: changes in buyers and sellers since the outbreak of the COVID-19 crisis (in per cent)</i>	10
Figure 9	<i>Main sales channels, before outbreak of COVID-19 and channels with highest recent growth (in per cent)</i>	10
Figure 10	<i>Types of goods and services sold online by e-commerce companies before the COVID-19 outbreak (in per cent)</i>	11
Figure 11	<i>Third-party marketplaces: top 5 sales categories before and after the COVID-19 crisis (in per cent)</i>	12
Figure 12	<i>Payment methods with highest growth since outbreak of the COVID-19 crisis (in per cent)</i>	13
Figure 13	<i>Changes in costs and workforce size since the outbreak of the COVID-19 crisis (in per cent)</i>	13
Figure 14	<i>Top 5 challenges during COVID-19 (in per cent)</i>	15
Figure 15	<i>Challenges since the COVID-19 outbreak in eTrade for all Policy Areas (in per cent)</i> ..	16
Figure 16	<i>Most important measures taken during the COVID-19 crisis (in per cent)</i>	18
Figure 17	<i>Number of governmental/public sector measures taken by country to support e-commerce businesses since the outbreak of the COVID-19 crisis</i>	19
Figure 18	<i>Number of countries reporting to have taken governmental/public sector measures to support e-commerce businesses since the outbreak of the COVID-19 crisis</i>	20
Figure 19	<i>Company involvement in new public-private sector initiatives to support e-commerce (in per cent)</i>	27
Figure 20	<i>Reasons for not participating in new public-private initiatives</i>	

预览已结束，完整报告链接和二维码

<https://www.yunbaogao.cn/report/index/report?re>