

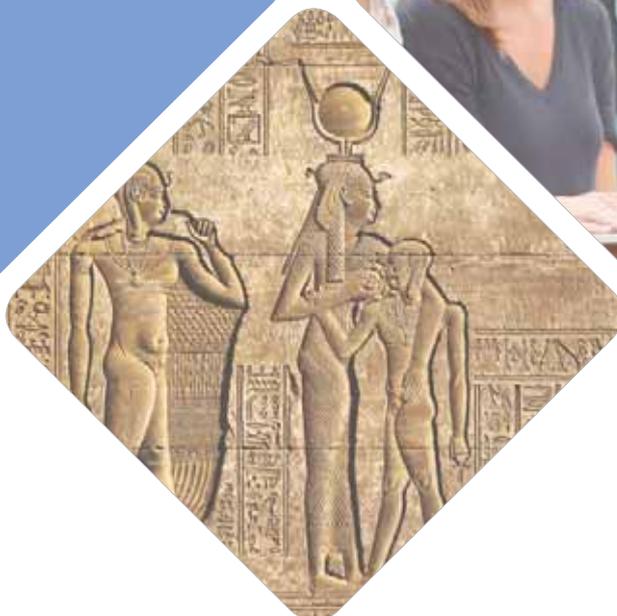


# ICT POLICY REVIEW: NATIONAL E-COMMERCE STRATEGY FOR EGYPT





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## NOTE

Within the Division on Technology and Logistics of UNCTAD, the ICT Policy Section carries out policy-oriented analytical work on the development implications of information and communications technologies (ICTs) and the digital economy, and is responsible for the biennial production of the Information Economy Report. The ICT Policy Section, among other things, promotes international dialogue on issues related to ICTs for development, such as e-commerce and entrepreneurship in the technology sector, and contributes to building developing countries' capacities to design and implement relevant policies and programmes in these areas.

The ICT Policy Section hosts the UNCTAD ICT Policy Review (ICTPR) Programme, which aims to support accelerated economic growth and development through effective diagnostics, national assessments, strategy development and policy advice to countries requesting technical assistance in areas such as e-commerce and ICT planning.

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## PREFACE

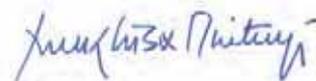
E-commerce is expanding rapidly in developing countries. As more goods and services are traded online, it becomes increasingly important for enterprises to have an online presence. E-commerce is facilitated by improved connectivity and the rapid proliferation of mobile phones, social media and new innovations. At the same time, many developing countries need to overcome various barriers to seize the full benefits from the evolving digital economy.

UNCTAD's ICT Policy Review Programme supports countries seeking to formulate a national e-commerce strategy through effective diagnostics, policy advice and customized strategy development. Egypt is the first country to benefit from the use of the ICTPR integrated e-commerce diagnostic framework.

Egypt has a consumer market of more than 90 million people, most of whom are younger than 30 years of age and increasingly technology-savvy. Internet penetration stands at 37.8 per cent, implying one of the largest populations of prospective online shoppers in the Arabic-speaking world. However, due to several barriers and challenges, e-commerce has been slow to take hold, and its potential is still largely untapped.

At the request of the Ministry of Communications and Information Technology (MCIT) of Egypt, UNCTAD is proud to have been given the opportunity to develop this national e-commerce strategy. It seeks to leverage Egypt's strengths while tackling the bottlenecks and challenges that impede e-commerce in the country. The publication sets out six sub-strategies, recommendations aimed at strengthening Egypt's performance in key policy areas, and six megaprojects. It is supplemented by an action plan to support the implementation of the strategy. Through these measures, the new strategy will help Egypt to position itself for more e-commerce and more benefits from e-commerce.

On behalf of UNCTAD, I would like to express our appreciation for the excellent collaboration with MCIT, other government offices, the private sector and civil society in Egypt. The strategy development has also benefited from partnerships and cooperation with the World Bank and several other United Nations agencies. My hope is that the analysis and recommendations contained in this report will make a valuable contribution to Egypt's efforts at leveraging e-commerce for economic growth, job creation and socioeconomic prosperity. I warmly commend those involved in the strategy development at UNCTAD, the Government of Egypt, and all the partners and collaborators for their efforts.



Mukhisa Kituyi  
UNCTAD Secretary-General

## FOREWORD

The Government of Egypt has been long committed to harnessing the significant advantages that ICTs can bring to national economic and social development. Since its establishment, the Ministry of Information and Communications Technology (MCIT) has been championing policy developments in the area of ICT for development, which has led to unprecedented growth in the Egyptian ICT sector, especially during the last couple of years.

I view future years as the dawn of a new era for Egypt's digital economy, with even more Egyptians going online. Ensuring that Egypt taps its full potential for e-commerce growth to drive its digital economy is important from the perspective of the Sustainable Development Goals, in particular Goal No. 8: "Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all". E-commerce in Egypt can play a crucial role in achieving the country's developmental goals, as Egypt aspires to harness the power of e-commerce to help catalyse innovation, growth and social prosperity in the digital economy; support and enhance trade; enable the development of new businesses and services; and increase people's welfare.

For this reason, the Government of Egypt collaborated with UNCTAD in the development of its national e-commerce strategy. The strategy comprises six sub-strategies aligned with our national priorities, including recommendations, megaprojects and an action plan. The strategy is a solid foundation for stimulating e-commerce growth in Egypt throughout the coming years.

I wish to express my appreciation for all the efforts and dedication by UNCTAD on this strategy. Egypt is heading steadily towards achieving better economic performance, inclusive growth and sustainable development. This strategy is a concrete step towards bringing this aspiration into reality.



Yasser El Kady  
Minister of Communications and Information Technology  
Egypt

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The ICTPR *National E-commerce Strategy for Egypt* was prepared under the overall direction of Shamika Sirimanne, Director of the Technology and Logistics Division of UNCTAD; and under the direct supervision of Torbjörn Fredriksson, Chief of the ICT Policy Section, UNCTAD. The strategy was prepared by a team led by Marie Sicat, UNCTAD ICTPR Programme Coordinator, in close coordination with Nagwa El Shenawi, Under Secretary of Information and Strategic Planning, Egypt MCIT. The UNCTAD team was comprised of international consultants David Hughes and Richard Labelle. The team effort involved partnership with the World Bank on payments for e-commerce, and Harish Natarajan was the main contributor in this context.

In addition to the partnership with the World Bank, the strategy benefited from valuable inputs from the International Labour Organization, the Universal Postal Union, the United Nations Educational, Scientific and Cultural Organization, the International Trade Centre; the Organisation for Economic Co-operation and Development, the European Commission and the World Intellectual Property Organization. The strategy also benefited from interdivisional cooperation within UNCTAD and interdepartmental cooperation within the United Nations Secretariat.

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## ABBREVIATIONS

4G	fourth generation of wireless mobile telecommunications technology
B2B	business-to-business
B2C	business-to-consumer
BPO	business process outsourcing
C2B	consumer-to-business
C2C	consumer-to-consumer
CAPMAS	Central Agency for Public Mobilization and Statistics (Egypt)
CBE	Central Bank of Egypt
CIT	Chamber of Information Technology and Communications (Egypt)
CPA	Consumer Protection Agency (Egypt)
EBC	Egyptian Banking Company
ERP	enterprise resource planning
FDI	foreign direct investment
GAFI	General Authority for Investment
GDP	gross domestic product
ICT	information and communications technology
ICTPR	ICT Policy Review
ILO	International Labour Organization
IoT	Internet of Things
IT	information technology
ITES	information technology enabled services
ITI	Information Technology Institute
ITIDA	Information Technology Industry Development Agency
ITO	information technology outsourcing
KPI	key performance indicator
KPO	knowledge process outsourcing
MCIT	Ministry of Communications and Information Technology
MENA	Middle East and North Africa
MSE	micro and small enterprises
MSME	micro, small and medium-sized enterprises
NGO	non-governmental organization
NTRA	National Telecommunication Regulatory Authority

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