



United Nations
Economic Commission for Africa

The Role of Digitalisation in Strengthening Capacities of Micro, Small and Medium-size Enterprises (MSMEs) in Southern Africa to Take Advantage of the AfCFTA

ECA Sub-Regional Office for Southern Africa (SRO-SA) & ECA Digital Centre of Excellence





TABLE OF CONTENTS

TABLE OF CONTENTS	i
LIST OF FIGURES	iii
LIST OF TABLES	iv
ACRONYMS & ABBREVIATIONS	v
ACKNOWLEDGEMENTS	7
STUDY OVERVIEW	8
Methodology.....	8
Structure of the Report.....	8
EXECUTIVE SUMMARY	10
CHAPTER ONE: MSME, AfCFTA AND DIGITALISATION	13
1.1 Characterising African MSMEs.....	13
1.2 Defining MSMEs	15
1.3 Digitalisation & Digital Ecosystems.....	18
1.4 Emerging Trends in MSME Digitalisation	19
1.5 Likely Impacts of AfCFTA on MSMEs in SADC.....	23
1.6 Regional Trade.....	24
1.7 Industrialisation.....	25
1.8 Are African MSMEs Ready for the AfCFTA?	28
1.8.1 AfCFTA and Implications for MSMEs in Africa	28
1.8.2 AfCFTA Implementation and MSMEs.....	32
1.9 Summary of Chapter One.....	35
CHAPTER TWO: OPPORTUNITIES FOR MSMEs UNDER THE AfCFTA	36
2.1 E-Commerce & Digital Trade	36
2.2 MSMEs and Regional Value-chains	38
2.3 Mineral Beneficiation	39
2.4 Pharmaceuticals.....	40
2.5 Agribusiness and Agro-processing	41
2.6 Professional Services.....	42
2.7 Linkages with Large Enterprises	43
2.8 Summary of Chapter Two	44
CHAPTER THREE: SITUATION ANALYSIS OF MSMEs IN SOUTHERN AFRICA	45
3.1 MSME Policy & Business Environment in Southern Africa	45
3.2 Challenges & Constraints.....	48

3.3 Access to Finance	49
3.4 Access to Markets	50
3.5 Business Environment.....	50
3.6 Infrastructure	52
3.7 MSME Capacities & Competitiveness	52
3.8 Obstacles to Digital Trade.....	53
3.9 Informalisation & on boarding Informal MSMEs	54
3.10 Business Formalisation.....	55
3.11 Impact of Covid-19 on MSMEs in Southern Africa & Digitalisation Effects.....	56
3.12 Covid-19 Relief Schemes for MSMEs and Post Covid-19 Outlook for MSMEs	57
3.13 Summary of Chapter Three.....	59
CHAPTER FOUR: ENABLING DIGITALIZATION OF MSMEs IN SOUTHERN AFRICA.....	60
4.1 Technology & Infrastructure Environment.....	60
4.2 Connectivity, Access & Usage	61
4.3 Cybersecurity & Data Protection	66
4.4 Digital Platforms	66
4.5 Innovation and Tech Hubs.....	68
4.6 Digital Skills	70
4.7 MSME Digital Capacity Initiatives	71
4.8 Summary of Chapter Four.....	73
CHAPTER FIVE: LESSONS LEARNED – REVIEW OF FINDINGS	74
5.1 Main Messages.....	74
5.2 Summary of Chapter Five	79
CHAPTER SIX: RECOMMENDATIONS.....	80
REFERENCES	84
APPENDICES.....	98
Appendix A: MSME Definitions in SADC Countries.....	98
Appendix B: Covid-19 Relief Measures Of SADC Countries For MSMES	102
Appendix C: List of MSME Stakeholders & Key Informants.....	104
Appendix D: Semi-Structured Interview Questions	105

LIST OF FIGURES

Figure 1: Evolution of MSME digitalisation.....	20
Figure 2: Use of digital tools by South African MSMEs.	21
Figure 3: SADC services value added (2015 – 2019).....	43
Figure 4: Most common barriers to MSME growth in SADC countries.	48
Figure 5: Ease of Doing Business Score for SRO-SA countries.....	51
Figure 6: Digital Skills in Africa.	70

LIST OF TABLES

Table 1: Proportion of MSMEs in Southern Africa.	14
Table 2: Contribution of MSMEs to national economies in Southern Africa.	15
Table 3: Selected definitions of African MSMEs	16
Table 4: MSME Country Definitions by Number of Employees	17
Table 5: State of manufacturing in SADC.	26
Table 6: State of preparedness for AfCFTA implementation.....	33
Table 7: Status of AfCFTA Implementation Strategies in SADC.....	34
Table 8: Southern Africa B2C landscape.	38
Table 9: Commercial mineral deposits in SADC.....	40
Table 10: Overarching national MSME policies.....	46
Table 11: Infrastructure development in Southern Africa.....	60
Table 12: Mobile & internet connectivity.....	62
Table 13: Average price of 1GB in SADC.	64
Table 14: Mobile broadband download speeds.	65

ACRONYMS & ABBREVIATIONS

3D	Three-dimensional
3G	Third Generation Mobile Network Technology
4G	Fourth Generation Mobile Network Technology
5G	Fifth Generation Mobile Network Technology
AfCFTA	African Continental Free Trade Agreement
AI	Artificial Intelligence
AU/AUC	African Union Commission
B2B	Business-to-Business
B2C	Business-to-Consumer
BDES	Business Development Services
BSA	Business South Africa
CBAM	Confederation of Business Associations of Mozambique
COMESA	Common Market for Eastern and Southern Africa
CZI	Confederation of Zimbabwe Industries
DCE	Digital Centre of Excellence
DTSA	Digital Transformation Strategy for Africa
EAC	East African Community
ECA	Economic Commission for Africa
ECOWAS	Economic Community of West African States
EDBM	Economic Development Board of Mauritius
GDP	Gross Domestic Product
GNI	Gross National Income
GSM	Global System for Mobile communication
GVC	Global Value-chains
HIV	Human Immuno-Deficiency Virus
ICESA	Inter-governmental Committee of Experts of Southern Africa
ICT	Information and Communications Technology
ITC	International Trade Centre
IOT	Internet of Things
MNO	Mobile Network Operator
MSMEs	Micro, Small and Medium-size Enterprises
MVA	Manufacturing value-added

NATF	Namibian Agricultural Trade Forum
NTB	Non-Tariff Barriers
NTMs	Non-Tariff Measures
PAPSS	Pan-African Payment and Settlement System
REC	Regional Economic Community
SACAU	Southern African Confederation of Agricultural Union
SADC	Southern African Development Community
SME	Small and Medium-size Enterprises
SRO-SA	Sub-Regional Office for Southern Africa
TSA	Tanzania Spices Association
UNDESA	United Nations department of Economic and Social Affairs
USD	United States Dollar
UPU	Universal Postal Union
WB	World Bank
ZNCC	Zimbabwe National Chamber of Commerce

预览已结束，完整报告链接和二维码如下：

https://www.yunbaogao.cn/report/index/report?reportId=5_32104

