

Ministry of Communications
and Information Technology



البريد المصري
EGYPT POST

E-Commerce Ecosystem

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Strategy



01

FinTech & Innovation

Incubating new FinTech Solutions and innovation to deliver new services or enhance current customer experience.

02

Digitization

Developing new Channels and digital products that can reach customer better and quicker.

03

New Segments

Developing new Channels and digital products that can reach customer better and quicker.

Enterprises face a **changing environment**

High customer expectations,

Further consolidation and bigger economies of scale

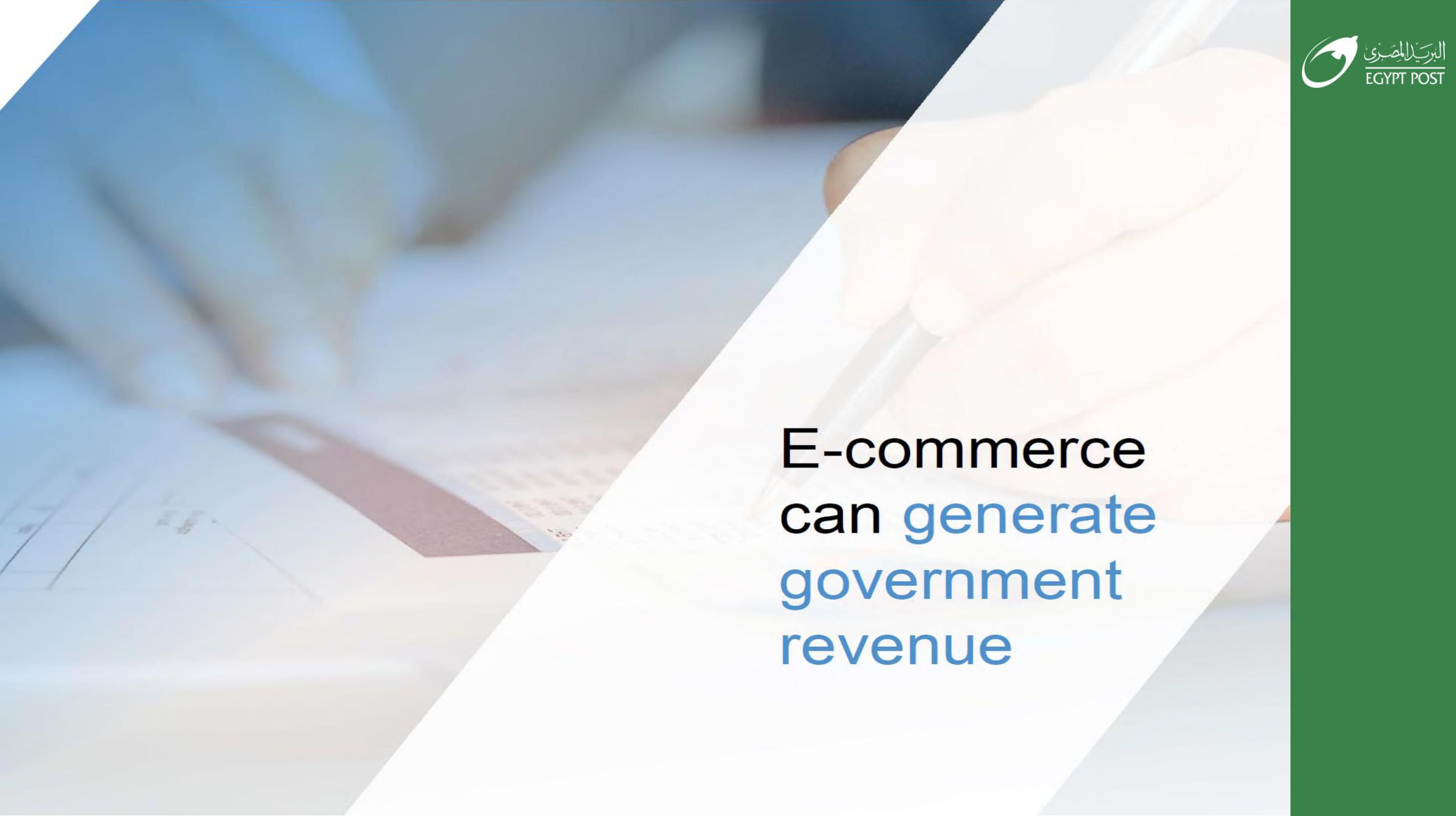
Constant, rapid change and uncertainty



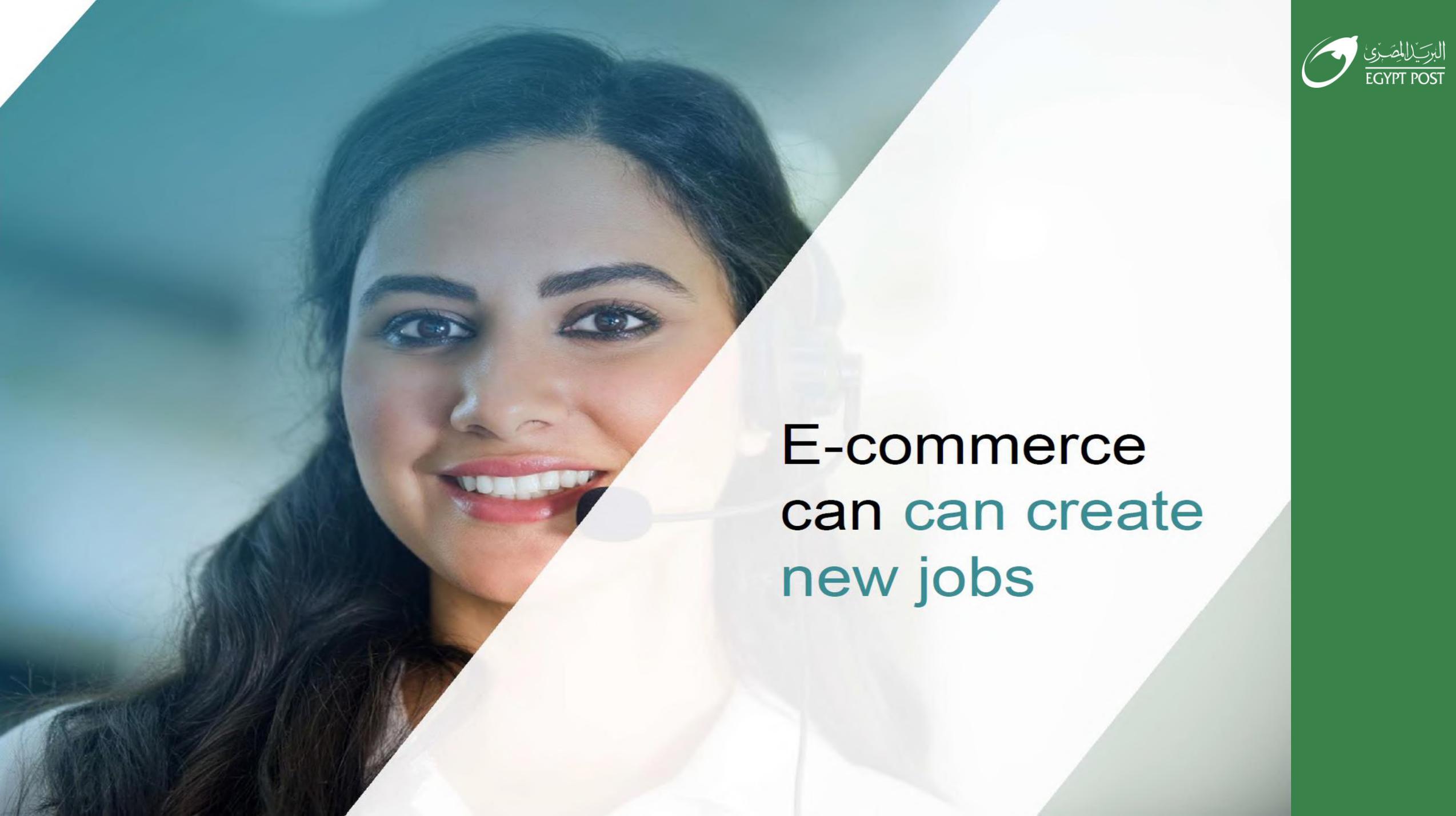
E-commerce
can boost
economic
growth



E-commerce
can **facilitate**
exports



**E-commerce
can generate
government
revenue**



E-commerce
can create
new jobs

E-COMMERCE: ALREADY A DRIVING FORCE IN RETAIL

Global e-commerce revenues were expected to grow 15% annually in 2020, but with the pandemic's boost, they shot up **25%.**²³ That growth was supported in part by an array of innovative solutions e-commerce players adopted to enhance the customer experience and improve the attractiveness of online offerings.

E-commerce

		Service Consumer		
		Consumer	Business	Administration
Service Provider	Consumer	Consumer-to-Consumer (C2C) e.g., classified ad on a personal homepage	Consumer-to-Business (C2B) e.g., web page with personal ability profile	Consumer / Citizen-to-Administration (C2A) e.g., citizen evaluates public environment project
	Business	Business-to-Consumer (B2C) e.g., products and services in one eShop	Business-to-Business (B2B) e.g., order with suppliers (supply chain)	Business-to-Administration (B2A) e.g., electronic services for public administration
	Administration	Administration-to-Consumer / Citizen (A2C) e.g., possibility of electronic elections	Administration-to-Business (A2B) e.g., public advertisement of project plans	Administration-to-Administration (A2A) e.g., forms of cooperation in virtual communities

Fig. 1.1: Various electronic business relationships

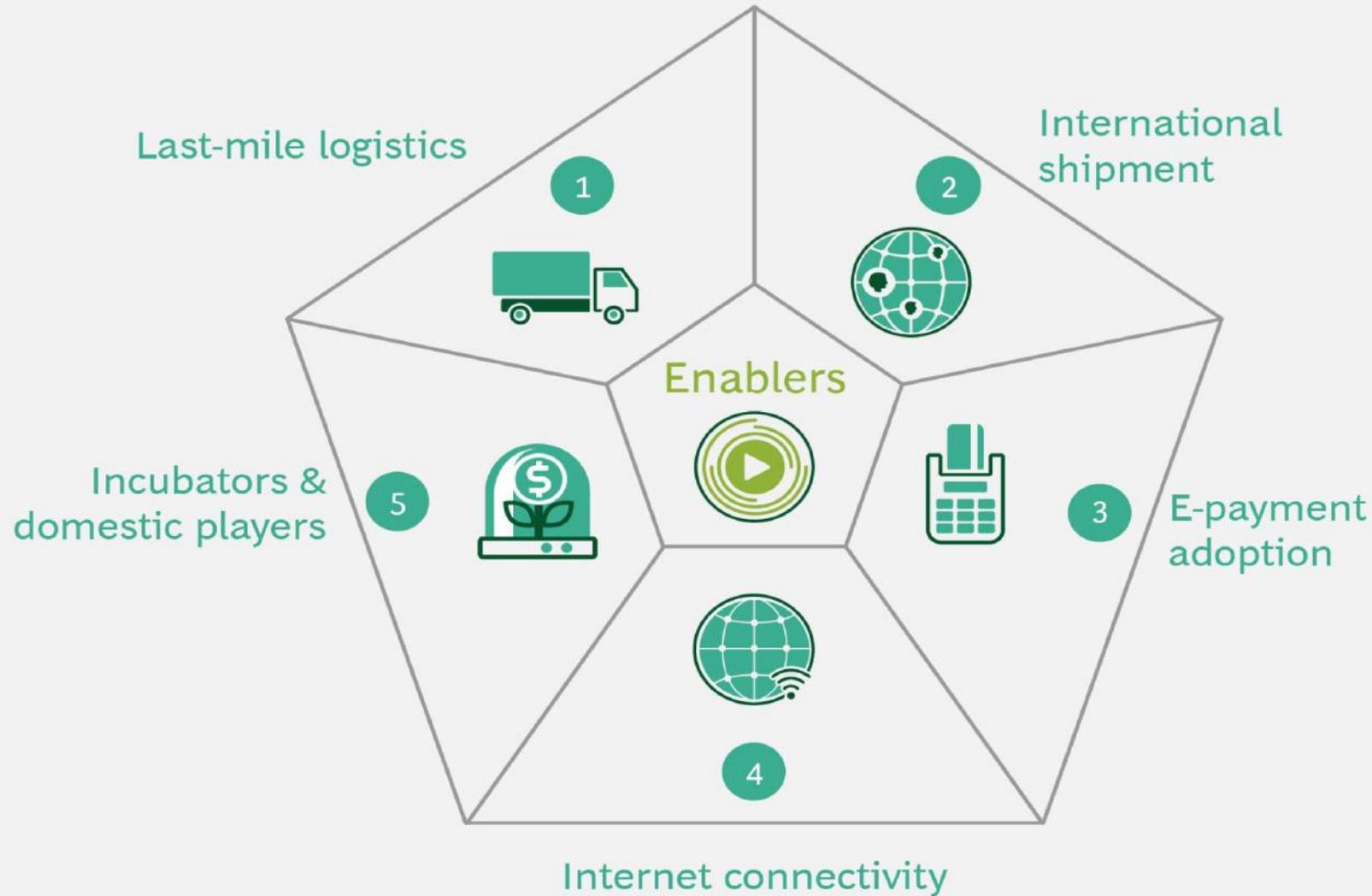
Exhibit 1

E-commerce Customer Benefits



Source: BCG analysis

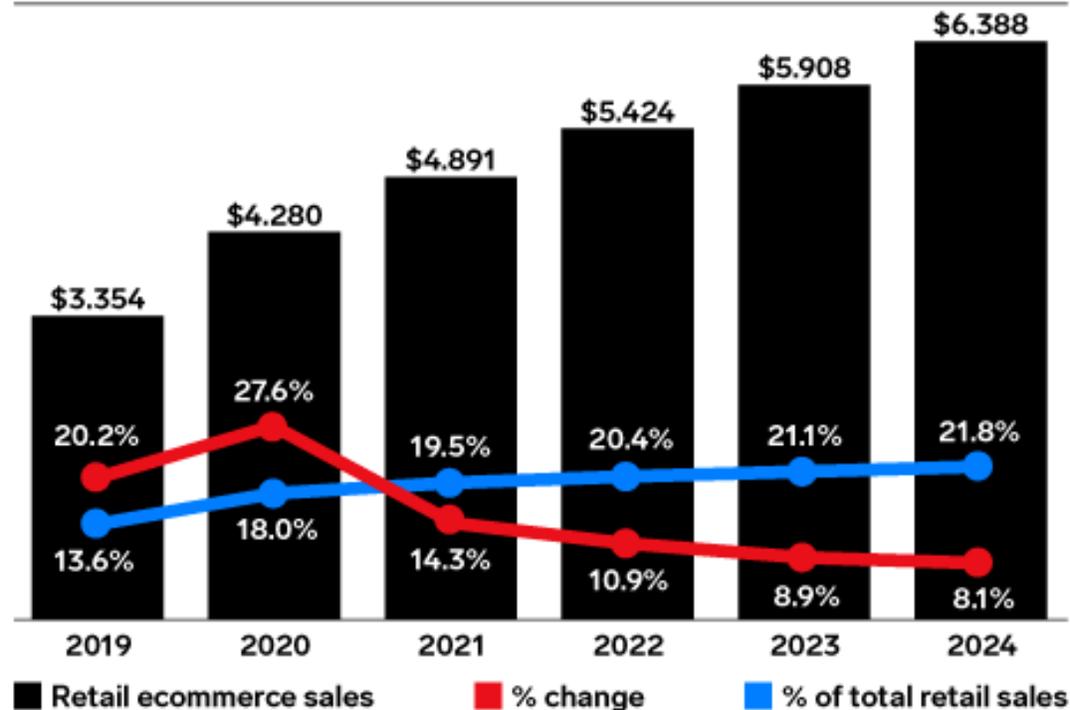
Five Key Enablers Can Significantly Improve Business Environment for E-commerce



How big is the global ecommerce market?

- The global ecommerce market is expected to total \$4.89 trillion in 2021.

Retail Ecommerce Sales Worldwide, 2019-2024
trillions, % change, and % of total retail sales



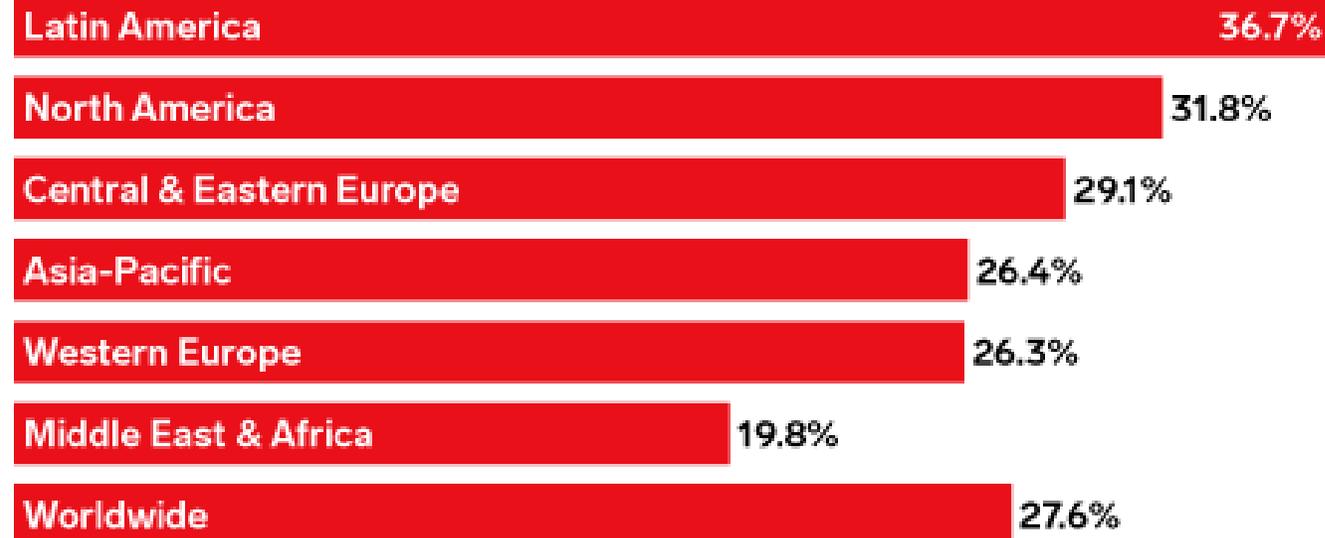
Note: includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets, payments such as bill pay, taxes or money transfers, food services and drinking place sales, gambling and other vice goods sales
Source: eMarketer, Dec 2020

Global ecommerce sales growth

According to eMarketer, online retail sales will reach \$6.39 trillion, with ecommerce taking up 21.8% of total retail sales.

Retail Ecommerce Sales Growth Worldwide, by Region, 2020

% change



Note: includes products or services ordered using the internet, regardless of the method of payment or fulfillment; excludes travel and event tickets, payments such as bill pay, taxes or money transfers, food services and drinking place sales, gambling and other vice goods sales

Source: eMarketer, Dec 2, 2020

ASIA PACIFIC		
TRAVEL		70%
FASHION		69%
IT & MOBILE		55%

NORTH AMERICA		
TRAVEL		55%
BOOKS & MUSIC		55%
FASHION		54%

WESTERN EUROPE		
TRAVEL		62%
FASHION		57%
BOOKS & MUSIC		54%

EASTERN EUROPE		
FASHION		53%
TRAVEL		44%
EVENT TICKETS		44%

AFRICA & MIDDLE EAST		
FASHION		38%
TRAVEL		38%
IT & MOBILE		31%

LATIN AMERICA		
TRAVEL		47%
FASHION		44%
BOOKS & MUSIC		41%

Product-market fit varies by region and country

3 key metrics to identify the most attractive African markets



Market Size

Assess market potential based on market GDP



Digital Development

Assess platform potential based digital savings & ICT infrastructure readiness



Egypt Export & Trade partner in Africa

Ensure sizeable trading partners are included for further assessment

8 trade agreements were identified across Africa where Egypt is a member state in all of them

Not-exhaustive

| Active trade agreements

| Aspirational/under discussion trade agreements

Trade policy / agreement	Member countries with Egypt	Description
1. Greater Arab Free Trade Agreement (GAFTA)		Eliminate all non-tariff barriers (NTB's), including administrative, monetary, financial and technical barriers
2. Common Market for Eastern and Southern Africa (COMESA)		Free trade agreement Customs union (2009): customs exemptions on all imports of products originating in member country with a value-added amounting to 45%
3. Agadir Free Trade Agreement		Enhance trade exchange between Egypt and the signatory Arab countries. Increase the prospective European Market Access for products of Party states, which consequently will encourage investments and increase inter-country regional cooperation.
4. South Africa-Egypt Joint Bilateral Commission		A joint bilateral commission between Egypt and South Africa Aims to boost trade and investments
5. Bilateral agreement for air services		Free access to the market and traffic rights for the regular air services between the two countries
6. African Continental Free Trade Agreement (AfCFTA)		Agreement to make ~90% of trade within the continent duty-free by July 2020 and ~97% of trade duty free by 2030
7. The Community of Sahel-Saharan States (CEN-SAD)		Objectives: Free movement of persons, capitals and interests of nationals of member states Objectives: Free trade and movement of goods, commodities and services from member states
8. Egyptian-Tanzanian Business Council		Establish council between the Egyptian Businessmen Association and the Tanzanian Chamber of Trade and Industry to promote trade

Realtime Data is expensive

Don't waste your resources

Thank You