



Malawi

Rapid eTrade Readiness Assessment



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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 Information Economy Report (IER) 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.

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;

Malawian currency, the Kwacha (MK), is exchanged at US\$ 732.18 at the middle rate of 23 August 2019.

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



PREFACE

The eTrade for all Initiative, launched at the fourteenth Ministerial Conference of UNCTAD in July 2016, is a practical example of how to harness the digital economy in support of the 2030 Agenda for Sustainable Development, notably Sustainable Development Goals (SDGs) 5, 8, 9, and 17. The initiative seeks to raise awareness, enhance synergies, and increase the scale of existing and new efforts by the development community to strengthen the ability of developing countries to engage in and benefit from e-commerce by addressing seven relevant policy areas:

- E-commerce readiness assessment and strategy formulation
- ICT infrastructure and services
- Trade logistics and trade facilitation
- Payment solutions
- Legal and regulatory frameworks
- E-commerce skills development
- Access to financing

As part of the initiative, demand-driven assessments are envisaged to provide a rapid analysis of the current e-commerce situation in the countries concerned, and to identify opportunities and barriers. The resulting reports will serve as a valuable input to these countries' involvement in various discussions related to e-commerce and digital trade, such as in the context of the UNCTAD Intergovernmental Group of Experts (IGE) on E-commerce and the Digital Economy. It may furthermore help developing countries, especially LDCs, to identify areas in which they could benefit from assistance by eTrade for all partners.

Malawi's Rapid eTrade Readiness Assessment is the twenty-first of such assessments conducted by UNCTAD. This report is expected to contribute to the efforts of the Government of Malawi to build a robust, safe and business-friendly e-commerce and digital economy environment.

With the eTrade for all partners, UNCTAD is committed to supporting Malawi in its resolve to make e-commerce work for the country's development.

Shamika N. Sirimanne

Director, Division on Technology and Logistics, UNCTAD



As a founding partner of the eTrade for all initiative, the EIF continues its support of Rapid eTrade Readiness Assessments, recognizing that they are a crucial tool to better integrate the least-developed countries into the global digital economy. The eTrade Readiness Assessment of Malawi illustrates the opportunities that digital trade can offer for economic development. It also stresses that realizing these opportunities requires concerted efforts by the Government, the private sector and development partners.

With only two main suppliers and high costs as compared to African neighbours, less than 14 per cent of Malawians use the Internet, and the adoption of e-commerce in Malawi is relatively slow. This report responds with actionable recommendations for the Government of Malawi to help leverage development assistance in areas that will assist Malawi in meeting Sustainable Development Goal 9.c, which calls for universal affordable access to the Internet.

Apart from costs, another major constraint highlighted by this report is the population's lack of knowledge of, and trust in, online systems. This report prioritizes actions to strengthen this aspect by, among other things, addressing the skills gap inherent in higher education and training programmes that have not yet embraced the development of e-commerce skills. Other trust strengthening areas highlighted include cross-border transactions, personal data protection and dispute resolution mechanisms to manage consumer complaints. In addition, ensuring access to finance remains important for small businesses to realize the potential of digital trade.

While acknowledging significant constraints, the report also recognizes important improvements made in recent years, which show Malawi's desire to tackle these issues. By adopting the Electronic Transactions and Cyber Security Act, 2016, Malawi has laid a strong foundation to ensure the development of e-commerce-related services. Malawi is also implementing the WTO Trade Facilitation Agreement and is on the way towards setting up a National Single Window to foster paperless trade and e-payments.

The recommendations put forward in this eTrade Readiness Assessment will serve as a catalyst for bringing the solution-orientated partnership between the Government and the people of Malawi and the EIF, UNCTAD and the broader partnership in the EIF to the next level. By working together, we will address the overall need for the e-trade ecosystem to be structured and organized in Malawi to avoid the proliferation of informal and unskilled operators, with obvious losses for the Government and consumers.

Follow-through EIF support has proven to be successful in addressing the recommendations identified in various eTrade Readiness Assessments conducted in the past. These include support to e-commerce strategy formulation, capacity development and coordination in Bangladesh, Bhutan, Cambodia, Myanmar, Nepal, Rwanda and Senegal; and a targeted project for women-led small- and medium-sized enterprises in the South Asian region.

I would like to thank the authors of the report and our colleagues at UNCTAD for bringing to light the state of play of e-trade readiness in Malawi, taking stock of recent progress and identifying the necessary actions that will further support digital development in Malawi. I would also like to express my gratitude to Hon. Ibrahim Salim Bagus, Minister of Industry, Trade and Tourism; Dr Ken Ndala, Principal Secretary for the Ministry of Industry, Trade and Tourism (MoIT); Ms Christina Zakeyo Chatima and Mr Mufwa Munthali, respectively Director and Deputy Director of Trade at the MoIT; the EIF in-country team; and the Government of Malawi for the commitment in realizing the country's potential in digital economy.

The EIF stands ready to support Malawi's efforts in achieving poverty reduction and sustainable development through trade, including harnessing the potential of digital technology for promoting trade, in any way it can.

Ratnakar Adhikari

Executive Director

Executive Secretariat for the EIF



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ABBREVIATIONS

AfCFTA	African Continental Free Trade Area
API	Application Programming Interface
APMC	Arts Production and Marketing Cooperative
ASYCUDA	Automated System for Customs Data
B2C	Business-to-Consumer
BAM	Bankers Association of Malawi
C2C	Customer-to-Customer
CAMA	Consumers Association of Malawi
CDS	Customs Declaration System
CERT	Computer Emergency Response Team
CFTC	Competition and Fair Trading Commission
CLF	Converged Licensing Framework
COMESA	Common Market for Eastern and Southern Africa
COSOMA	Copyright Society of Malawi
CPC	Consumer Protection Council
DAI	Digital Adoption Index
DFS	Digital Financial Services
EASSy	Eastern Africa Submarine Cable System
ECSC	E-commerce Service Centre
EIF	Enhanced Integrated Framework
FSDS	Financial Sector Development Strategy
GNI	Gross National Income
GoM	Government of Malawi
ICT	Information and Communications Technology
ICTAM	ICT Association of Malawi
IDI	ICT Development Index
IFAD	International Fund for Agricultural Development
ISP	Internet Service Providers
ITC	International Trade Centre
ITU	International Telecommunication Union
KYC	Know Your Customer

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