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DIGITAL 2019

ECONOMY REPORT

VALUE CREATION AND CAPTURE:
IMPLICATIONS FOR DEVELOPING COUNTRIES



UNITED NATIONS

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

UNCTAD



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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 communications technologies (ICTs) and e-commerce. It is responsible for the preparation of the *Digital Economy Report*, previously known as the Information Economy Report. The ICT Policy Section promotes international dialogue on issues related to ICTs for development, and contributes to building developing countries' capacities to measure e-commerce and the digital economy and to design and implement relevant policies and legal frameworks. The Section also manages the *eTrade for all* initiative.

In this Report, the terms country/economy refer, as appropriate, to territories or areas. The designations of country groups are intended solely for statistical or analytical convenience, and do not necessarily express a judgement about the stage of development reached by a particular country or area in the development process. Unless otherwise indicated, the major country groupings used in this Report follow the classification of the United Nations Statistical Office. These are:

Developed countries: the member countries of the Organisation for Economic Co-operation and Development (OECD) (other than Chile, Mexico, the Republic of Korea and Turkey), plus the European Union member countries that are not OECD members (Bulgaria, Croatia, Cyprus, Lithuania, Malta and Romania), plus Andorra, Liechtenstein, Monaco and San Marino. *Countries with economies in transition* refers to those in South-East Europe and the Commonwealth of Independent States. *Developing economies* in general are all the economies that are not specified above. For statistical purposes, the data for China do not include those for Hong Kong Special Administrative Region of China (Hong Kong, China), Macao Special Administrative Region of China (Macao, China) or Taiwan Province of China. An excel file with the main country groupings used can be downloaded from UNCTADstat at: <http://unctadstat.unctad.org/EN/Classifications.html>.

References to Latin America include the Caribbean countries unless otherwise indicated.

References to sub-Saharan Africa include South Africa unless otherwise indicated.

References to the United States are to the United States of America, and to the United Kingdom are to the United Kingdom of Great Britain and Northern Ireland.

The term “dollars” (\$) refers to United States dollars, unless otherwise indicated.

The term “billion” signifies 1,000 million.

The following symbols may 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.

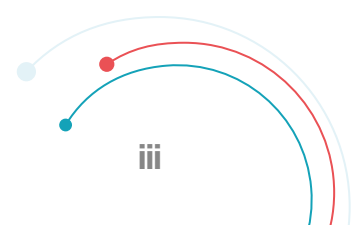
A blank in a table indicates that the item is not applicable, unless otherwise indicated.

A slash (/) between dates representing years, e.g. 1994/95, indicates a financial year.

Use of an en dash (–) between dates representing years, e.g. 1994–1995, signifies the full period involved, including the beginning and end years.

Annual rates of growth or change, unless otherwise stated, refer to annual compound rates.

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



Preface

The digital revolution has transformed our lives and societies with unprecedented speed and scale, delivering immense opportunities as well as daunting challenges. New technologies can make significant contributions to realizing the Sustainable Development Goals, but we cannot take positive outcomes for granted. We must urgently improve international cooperation if we are to achieve the full social and economic potential of digital technology, while avoiding unintended consequences.

Given the high stakes involved, I established a High-level Panel on Digital Cooperation to help expand understanding of the key digital opportunities and challenges before us. The Panel brought together diverse experts and put forward a wide range of recommendations, including on how to better govern digital technology development through open, agile and multi-stakeholder models.

In that same spirit and in today's fast-changing environment, I welcome this timely *Digital Economy Report* of the United Nations Conference on Trade and Development, which examines the implications of the digital economy, especially for developing countries.

Digital advances have generated enormous wealth in record time, but that wealth has been concentrated around a small number of individuals, companies and countries. Under current policies and regulations, this trajectory is likely to continue, further contributing to rising inequality. We must work to close the digital divide, where more than half the world has limited or no access to the Internet. Inclusivity is essential to building a digital economy that delivers for all.

New technologies, especially artificial intelligence, will inevitably lead to a major shift in the labour market, including the disappearance of jobs in some sectors and the creation of opportunities in others, on a massive scale. The digital economy will require a range of new and different skills, a new generation of social protection policies, and a new relationship between work and leisure. We need a major investment in education, rooted not just in learning but in learning how to learn, and in providing lifelong access to learning opportunities for all.

The digital economy has also created new risks, from cybersecurity breaches to facilitating illegal economic activities and challenging concepts of privacy. Governments, civil society, academia, the scientific community and the technology industry must work together to find new solutions.

Not a day passes for me without seeing the many ways in which digital technology can advance peace, human rights and sustainable development for all. This report offers valuable insights and analyses, and I commend it to a wide global audience as we strive together to ensure that no one is left behind by the fast-evolving digital economy.



António Guterres
Secretary-General
United Nations



Foreword

The rapid spread of digital technologies is transforming many economic and social activities. However, widening digital divides threaten to leave developing countries, and especially least developed countries, even further behind. A smart embrace of new technologies, enhanced partnerships and greater intellectual leadership are needed to redefine digital development strategies and the future contours of globalization.

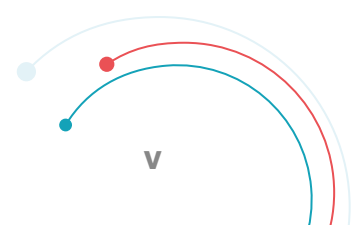
This first edition of the *Digital Economy Report* – previously known as the *Information Economy Report* – examines the implications of the emerging digital economy for developing countries in terms of value creation and capture. It highlights the two main drivers of value creation in the digital era – digital data and platformization – and explores how current trends of wealth concentration could be replaced by trajectories leading to more equitable sharing of the gains from digitalization.

These are still early days in the digital era, and we have more questions than answers about how to deal with the digital challenge. Given the absence of relevant statistics and empirical evidence, as well as the rapid pace of technological change, decision-makers face a moving target as they try to adopt sound policies relating to the digital economy.

UNCTAD is committed to accompanying its member States with evidence for informed decision-making, as they consider different policy options and practices aimed at benefiting from the digital economy. Beyond our research on the digital economy, our Intergovernmental Group of Experts on E-Commerce and the Digital Economy and the annual eCommerce Week provide valuable forums for policy dialogue. We also offer technical assistance and capacity-building, and seek to make such support more transparent and easily accessible through the *eTrade for all* initiative and its 30 partner organizations.

It is my hope that this holistic approach will respond to the desire of people in developing countries to take part in the new digital world, not just as users and consumers, but also as producers, exporters and innovators, for creating and capturing more value on their path towards sustainable development.

Mukhisa Kituyi
Secretary-General
United Nations Conference on Trade and Development



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