

BritCham Business Group eCommerce Monday 16th November



Mission

To provide a forum for interested stakeholders to collaborate and to promote eCommerce in Cambodia.

- **Promote** and **build awareness** of challenges and opportunities;
- **Coordinate** with other stakeholders including government and private sector groups;
- **Provide input** to draft eCommerce law;
- **Create** information resources for best practices

Sectors

Banking	Legal
Logistics	Telecommunications/ISP
Marketing & Media	Retail

Recap of Activities to-date

- Four meetings so far, to develop working group structure and focus, goals and mission
- Creating “Briefing Document” to capture challenges and opportunities, and surface Private Sector concerns and requirements for successful eCommerce in Cambodia
- Brainstorming session held to surface issues
- Sectors contributed input individually
- Presentation of synthesized draft Briefing Document + Feedback Session
- Today:
 - Presentation of survey findings
 - Agree on recommendations for next steps
 - Creation of Task Forces to address specific projects

Survey Findings

- Surveys were distributed at the e-commerce luncheon and via email to participants
- A total of 30 surveys were completed

How important is eCommerce to your organization?

- Not surprisingly for a group interested in eCommerce, importance of eCommerce to their organizations is ranked 8 out of 10.
- On a scale of 1-10, the average (mean) answer was 8.0. The median was also 8. The lowest response was 5.

What is your organization's participation in eCommerce today

- 43% of respondents said they were in the planning phases of eCommerce activity
- 43% indicated that their companies were actively engaged in it, or that it is already a significant part of their business today.

Expectations for eCommerce in 2 years

- Looking ahead, 71% of respondents said that in two years they expected eCommerce to be very important to their businesses
- 29% expected that it would be somewhat important
- No one answered that it would be not very important, or not important at all.

Challenges and Biggest Challenge

- Challenges were split nearly equally between:
 - Legal
 - Banking/Payment
 - Staff Training
 - Market Readiness
- A few respondents wrote in Logistics/Delivery (which was not supplied as an answer).
- As for Biggest Challenge, Banking/Payment emerged as the top concern, followed by consumer attitudes and readiness for eCommerce

Inspiration

- The big players: Alibaba, Amazon and eBay were mentioned most frequently.
- Several respondents expressed a desire for a local eCommerce platform provider
- Other tech companies mentioned were Google, PayPal, Wing, Smart
- Local companies Sabay, Little Fashion and 11th Street were also mentioned

Briefing Document - Areas

Technical and Operational Factors of eCommerce

Telecommunications / Internet Infrastructure

Financial Services / Payment Mechanisms

Delivery Infrastructure / Logistics

Socio-Economic and Cultural Factors of eCommerce

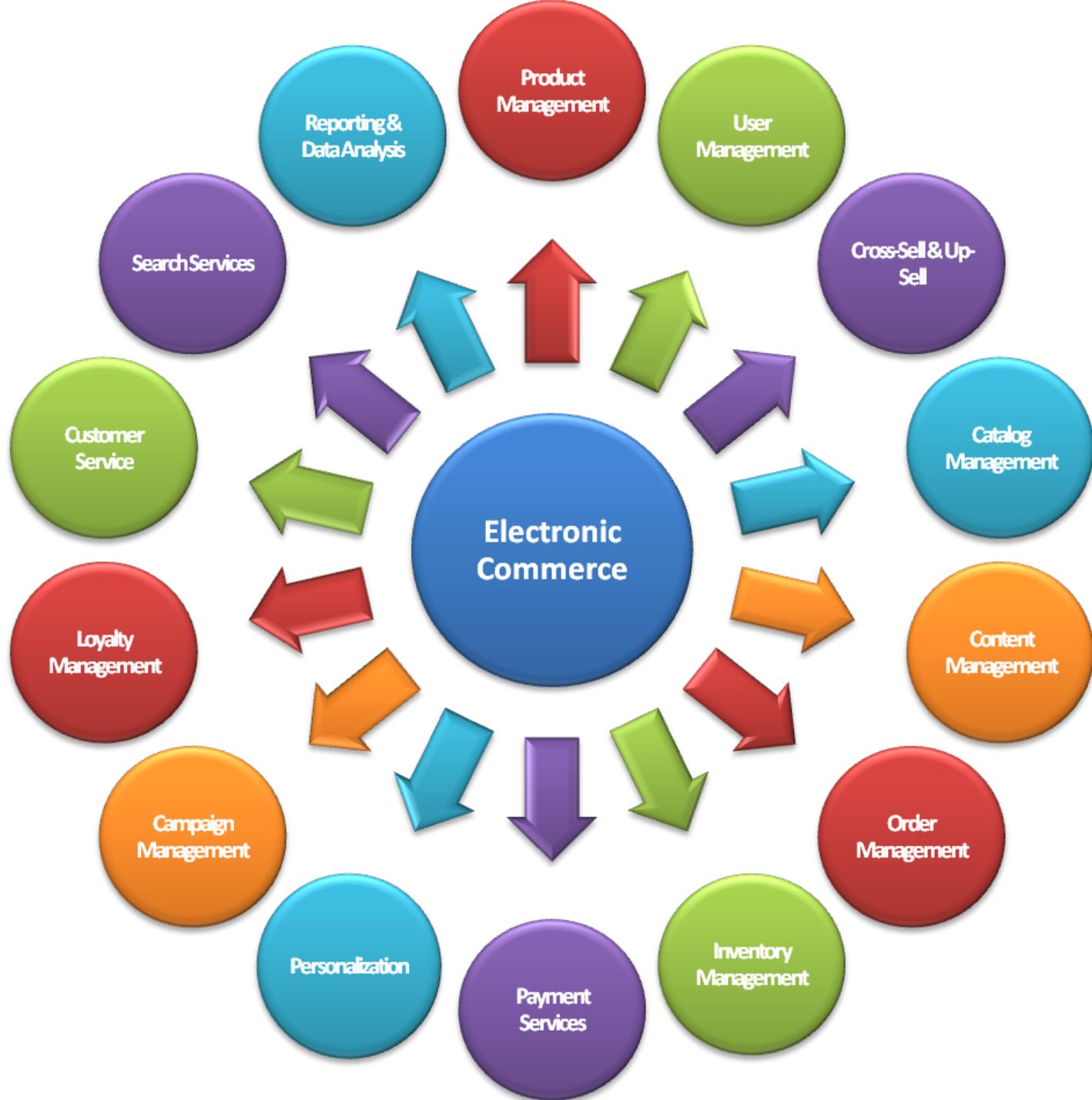
Requirements for Business Investment in
E-Commerce

Requirements for Consumer Use of E-commerce

Legal and Governmental Factors of eCommerce

General Business Law

Government Factors





Next Steps

- Agree issues to take on
- Agree approach
 - Research
 - White Papers
 - Presentations
 - Trade Missions
- Create task-forces to tackle specific issues
 - Market Evaluation
 - Market size and growth expectations
 - Business opportunities/barriers to eCommerce
 - Consumer opportunities/barriers to eCommerce
 - Banking
 - Legal
 - Logistics
 - Telecoms

Recommendations

- Promotion, awareness and education of e-commerce, market size and growth projections, to build understanding and trust with both buyers and sellers
- Draw on this working group, and local private-sector technical experts available, to provide expertise necessary to move forward on eCommerce areas.
- Existing banks and payment providers to take an industry lead on developing leadership and good standards / proactive stance with non-licensed payment providers / set a deadline for de-dollarization
- Industry can take the lead on developing codes-of-practice and -conduct, to be able to move faster than legislation
- Clean slate to use best-practice model legislation, codes of practice and sector guidelines without needing to refer to previous practices.
- Assign private postal codes to all buildings in Phnom Penh
- Training and Skills Development – Create an education program to address fundamental e-commerce concepts and skills development