eCommerce Philippines 2022

BASTA ECOMMERCE MADALI

(Market Access. DigitAlization. Logistics Integration**)**

E-COMMERCE PHILIPPINES ROADMAP 2022

The Process

04/03/2020

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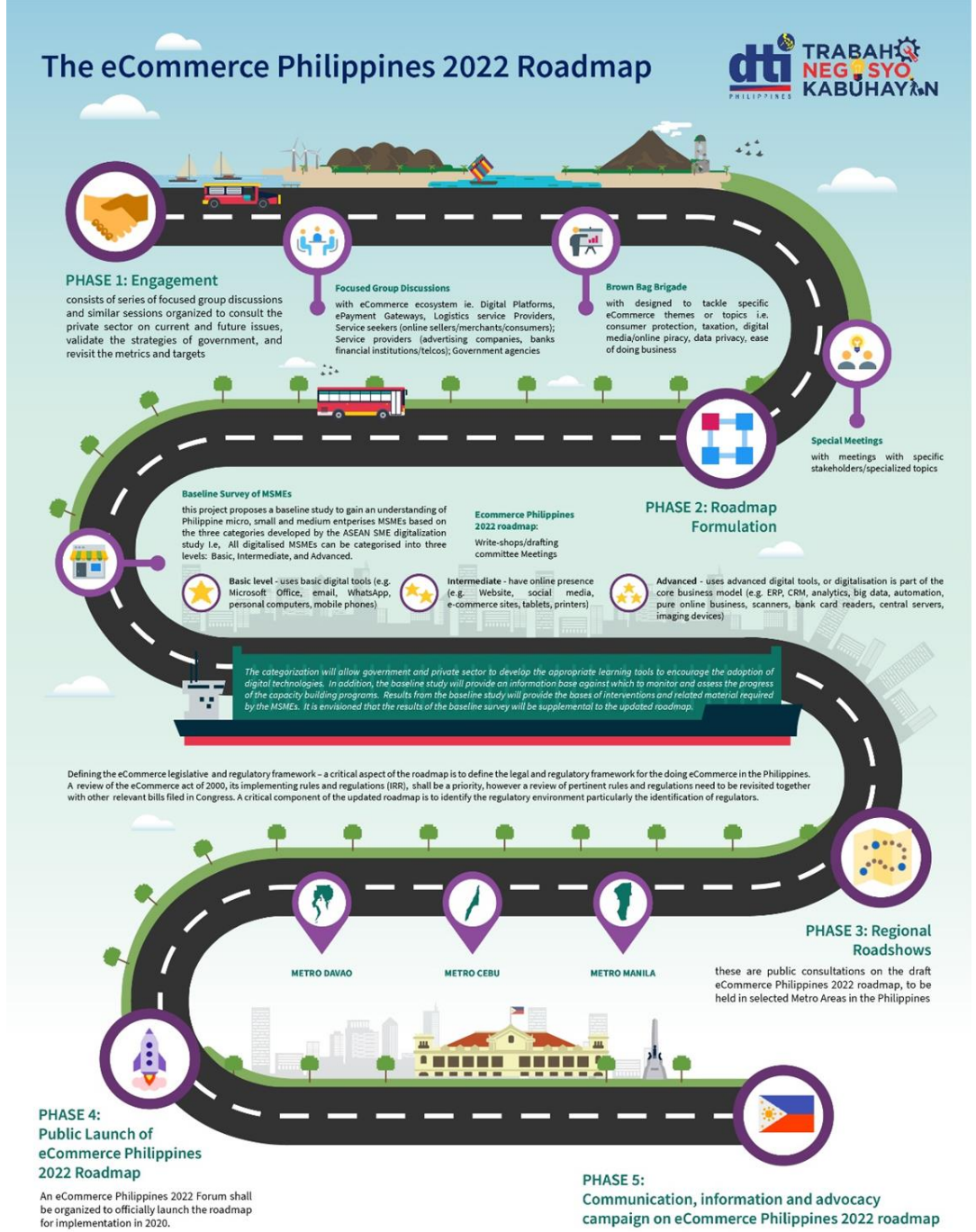
The eCommerce Philippines 2022 Roadmap



PHASE 1: Engagement

consists of series of focused group discussions and similar sessions organized to consult the private sector on current and future issues, validate the strategies of government, and revisit the metrics and targets

Focused Group Discussions

with eCommerce ecosystem ie. Digital Platforms, ePayment Gateways, Logistics service Providers, Service seekers (online sellers/merchants/consumers); Service providers (advertising companies, banks financial institutions/telcos); Government agencies

Brown Bag Brigade

with designed to tackle specific eCommerce themes or topics i.e. consumer protection, taxation, digital media/online piracy, data privacy, ease of doing business

Special Meetings

with meetings with specific stakeholders/specialized topics

PHASE 2: Roadmap Formulation

Baseline Survey of MSMEs

this project proposes a baseline study to gain an understanding of Philippine micro, small and medium entperises MSMEs based on the three categories developed by the ASEAN SME digitalization study I.e, All digitalised MSMEs can be categorised into three levels: Basic, Intermediate, and Advanced.

Ecommerce Philippines 2022 roadmap:

Write-shops/drafting committee Meetings

Basic level - uses basic digital tools (e.g. Microsoft Office, email, WhatsApp, personal computers, mobile phones)

Intermediate - have online presence (e.g. Website, social media, e-commerce sites, tablets, printers)

Advanced - uses advanced digital tools, or digitalisation is part of the core business model (e.g. ERP, CRM, analytics, big data, automation, pure online business, scanners, bank card readers, central servers, imaging devices)

The categorization will allow government and private sector to develop the appropriate learning tools to encourage the adoption of digital technologies. In addition, the baseline study will provide an information base against which to monitor and assess the progress of the capacity building programs. Results from the baseline study will provide the bases of interventions and related material required by the MSMEs. It is envisioned that the results of the baseline survey will be supplemental to the updated roadmap.

Defining the eCommerce legislative and regulatory framework – a critical aspect of the roadmap is to define the legal and regulatory framework for the doing eCommerce in the Philippines. A review of the eCommerce act of 2000, its implementing rules and regulations (IRR), shall be a priority, however a review of pertinent rules and regulations need to be revisited together with other relevant bills filed in Congress. A critical component of the updated roadmap is to identify the regulatory environment particularly the identification of regulators.

PHASE 3: Regional Roadshows

these are public consultations on the draft eCommerce Philippines 2022 roadmap, to be held in selected Metro Areas in the Philippines

METRO DAVAO

METRO CEBU

METRO MANILA

PHASE 4: Public Launch of eCommerce Philippines 2022 Roadmap

An eCommerce Philippines 2022 Forum shall be organized to officially launch the roadmap for implementation in 2020.

PHASE 5: Communication, information and advocacy campaign on eCommerce Philippines 2022 roadmap

What have we done so far?

How? Thinking Sessions, FGDs, Brown Bag Brigade Sessions, Stakeholder consultations in the regions, eCommerce Viber community

What? Update on PECR 2017-2020; Ecommerce Architecture (operating environment); defined the ecommerce Ecosystem (stakeholders);

eCommerce Philippines 2022 Framework

- Status of Philippine Ecommerce Roadmap 2016-2020
- Vision for 2030
- 2022 targets and revised metrics
- Suggested Strategies and Action Plan

Who? Platforms, Payment Gateways, Logistics Service Providers, Government, eCommerce intermediaries, MSMEs, consumers

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Who are crafting the eCommerce Philippines 2022 Roadmap

Private Sector (digital platforms, Fintech, logistics Service Providers, Banks, non financial institutions, intermediaries)

Public Sector (National Government Agencies, GOCCs, BSP)

eCommerce Viber Community

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Philippine E-Commerce Roadmap

Updating the PECR 2016-2020

to

E-Commerce Philippines Roadmap 2022

Ecommerce Philippines 2022 Roadmap

M A D A L I

Market
Access through
Digitalization
And
Logistics
Integration

Philippine E-Commerce Roadmap 2016-2020

- Launched in February 02, 2016
- The PECR 2016-2020 presents the Philippines' strategic plans, policies, and other support measures to harness the benefits of e-commerce for the country.
- Main objective: Contribute 25% to the country's Gross Domestic Product by 2020
- Its action plan is based on key areas highlighted in the APEC Digital Prosperity Checklist.

WHO ARE WITH US IN CRAFTING THE ECOMMERCE PHILIPPINES 2022

Dialogue with DTI Secretary

*"We need to **build trust** between online buyers and online sellers" - Sec Ramon M. Lopez*

165

Attended the Aug 6 2019 Kick-off meeting

E-COMMERCE PHILIPPINES 2022

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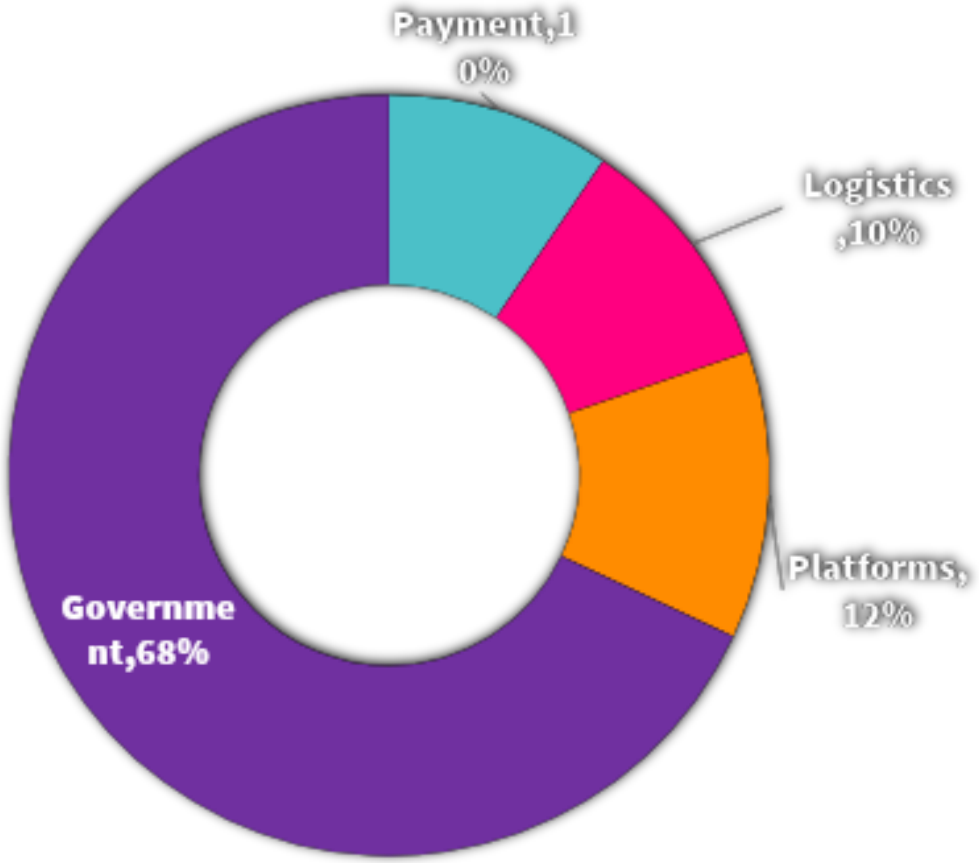
Focus Group Discussions with eCommerce Stakeholders



147

Attended the Focus Group Discussion

E-COMMERCE PHILIPPINES 2022

Gender	Payment	Logistics	Platform	Government	Total
Male	9	8	10	54	81 55%
Female	5	7	8	46	66 45%
Total	**14**	**15**	**18**	**100**	**147**

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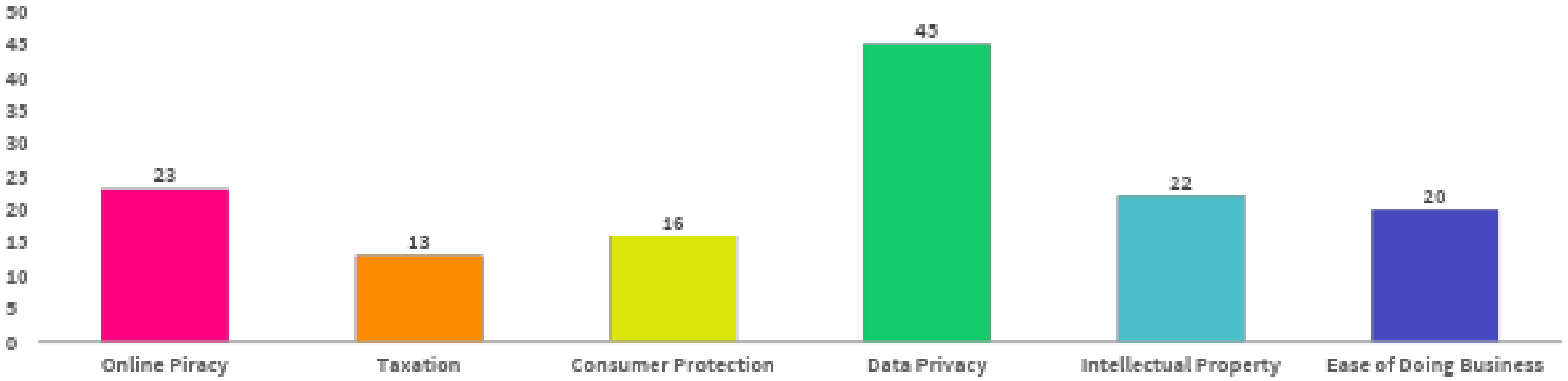
eCommerce Brown Bag Brigade Sessions



Gender	Online Piracy October 10	Taxation October 8	Consumer Protection October 10	Data Privacy October 15	Intellectual Property October 17	Ease of Doing Business October 21
Male	12	7	11	21	11	11
Female	11	5	5	24	11	9
Total	**23**	**13**	**16**	**45**	**22**	**20**

WHO ARE WITH US IN CRAFTING THE ECOMMERCE PHILIPPINES 2022

eCommerce Viber Community

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As of January 31,2020

ACTIVE MEMBERS

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Who are crafting the eCommerce Philippines 2022 Roadmap

PRIVATE SECTOR

1. ACADEMY OF DEVELOPMENTAL LOGISTICS, INC.
2. ADSPARK INC.
3. AIR21
4. AMERICAN CHAMBER OF COMMERCE OF THE PHILIPPINES
5. ANGARA ABELLO CONCEPCION REGALA & CRUZ LAW OFFICE (ACCRALAW)
6. ANGKAS PH
7. ANIMATION COUNCIL OF THE PHILIPPINES, INC.
8. ANVIL BUSINESS CLUB, INC.
9. ARGOMALL
10. ASIAN DEVELOPMENT BANK
11. ASSOCIATION OF INTERNATIONAL SHIPPING LINES, INC.
12. ASSOCIATION OF OFF-DOCK-CFS OPERATORS OF THE PHILIPPINES
13. BEAUTYMNL
14. BANCNET
15. BANKERS ASSOCIATION OF THE PHILIPPINES
16. BOWER GROUP ASIA
17. BURKLEY AND AQUINO LAW OFFICE
18. CAROUSELL PH
19. CHAMBER OF CUSTOMS BROKERS, INC.
20. CAUCUS INC.
21. CHAN ROBLES & ASSOCIATES LAW FIRM
22. COLD CHAIN ASSOCIATION OF THE PHILIPPINES
23 CONFEDERATION OF TRUCKERS ASSOCIATION OF THE PHILIPPINES
24. CONSENSYS
25 CONTACT CENTER ASSOCIATION OF THE PHILIPPINES
26. CREDIT CARD ASSOCIATION OF THE PHILIPPINES
27. CRYPTOCURRENCY PHILIPPINES
28. CUSTOMS BONDED WAREHOUSE OPERATORS CONFEDERATION INC.
29. DEVELOPMENT BANK OF THE PHILIPPINES (DBP)
30. DHL EXPRESS (PHILIPPINES) CORPORATION
31. DIGITAL COMMERCE ASSOCIATION OF THE PHILIPPINES, INC.
32. DIGITAL MARKETING PHILIPPINES (CJG DIGITAL MARKETING)
33. DIGITALFILIPINO.COM
34. DRAGON PAY
35. DUN AND BRADSTREET
36. EVIDENT COMMUNICATIONS
37. FACEBOOK
38. FOODPANDA
39, GAME DEVELOPERS ASSOCIATION OF THE PHILIPPINES
40. GAWIN PH
41. GLOBAL ENVIRONMENTAL CONCEPTS CORPORATION
42. GLOBE TELECOM, INC.
43. GRAB PHILIPPINES
44. GOOGLE PHILIPPINES
65. NORDIC CHAMBER OF COMMERCE OF THE PHILIPPINES
66. OMNIPAY, INC.
67. ONE NETWORK ECOMMERCE INC.
68. ONLINE PHILIPPINES CORP.
69. OTCER PH
70. OWTO Philippines, Inc
71. PAYMAYA (PAYMAYA PHILIPPINES, INC.)
72. PAYNAMICS TECHNOLOGIES INC.
73. PAYONEER
74. PHILIPPINE CENTER FOR OPEN DIGITAL ECONOMY (PHILCODE)
75. PHILIPPINE CHAMBER OF COMMERCE AND INDUSTRY (PCCI)
76. PHILIPPINE CLEARING HOUSE CORPORATION
77. PHILIPPINE COMPUTER EMERGENCY RESPONSE TEAM (PHCERT)
78. PHILIPPINE EXPORTERS CONFEDERATION, INC.
79. PHILIPPINE FRANCHISE ASSOCIATION
80. PHILIPPINE INTERISLAND SHIPPING ASSOCIATION
81. PHILIPPINE MARKETING ASSOCIATION
82. PHILIPPINE MULTIMODAL TRANSPORT & LOGISTICS ASSOCIATION, INC.
83. PHILIPPINE NATIVE E-TAILER CO / FOODSOURCE PH
84. PHILIPPINE SOFTWARE INDUSTRY ASSOCIATION
85. PLDT-GLOBAL
86. PORT USERS CONFEDERATION OF THE PHILIPPINES
87. PORTCALLS ASIA
88. QUADX, INC.

03/02/2020
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Who are crafting the eCommerce Philippines 2022 Roadmap

PUBLIC SECTOR

1. Bangko Sentral ng Pilipinas
2. Bureau of Customs
3. Bureau of Internal Revenue
4. Bureau of Treasury
5. Commission on Audit
6. Commission on Higher Education
7. Department of Agriculture
8. Department of Budget And Management
9. Department of Finance
10. Department of Foreign Affairs
11. Department of Health
12. Department of Justice
13. Department of Labor And Employment
14. Department of Science And Technology
15. Department of The Interior And Local Government
16. Department of Trade and Industry
17. Department of Tourism
18. Government Procurement Policy Board
19. National Bureau of Investigation
20. National Economic and Development Authority
21. National Privacy Commission
22. National Telecommunications Commission
23. Optical Media Board
24. Philippine National Police
25. Philippine Postal Corporation
26. Philippine Statistics Authority
27. Securities and Exchange Commission
28. Social Security System

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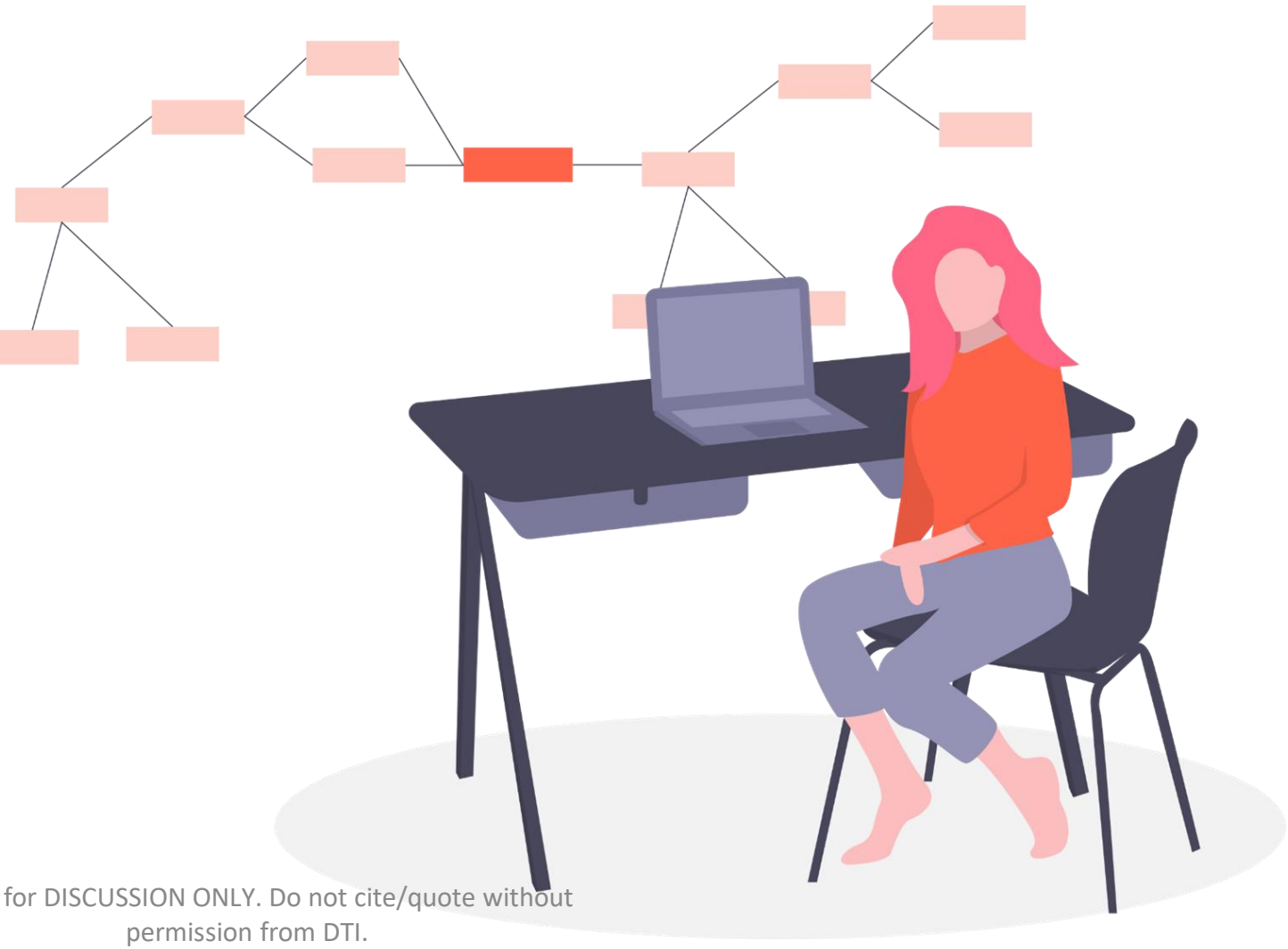
Preliminary results of eCommerce Philippines 2022

(Update on 2016-2020 Philippine eCommerce Roadmap)

Defining the eCommerce Architecture



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Defining the Players in the PHL eCommerce Ecosystem

E-Commerce architecture starts with having proper **infrastructure** in place as they enable the appearances of platforms

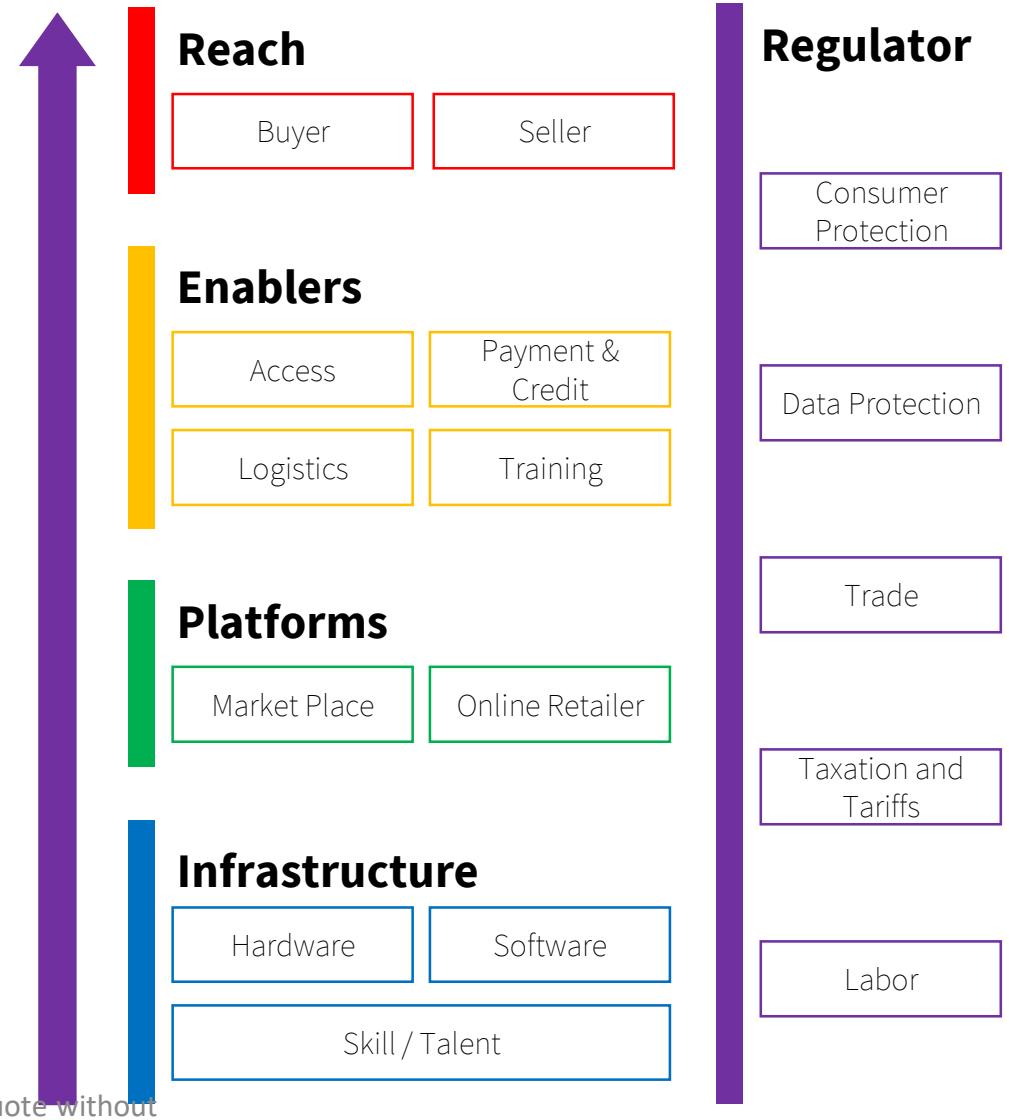
Platforms such as marketplaces and online retailers easily connect buyers and sellers

Enablers make it easy to buyers to purchase and sellers to market.

- *Access enables traffic to be directed to platforms;*
- *Payment & credit facilitates digital money transaction;*
- *Logistics provides fast and reliable delivery*
- *Training helps nurture the ecosystem*

Business friendly **regulations** in legal, consumer/data protection, trade and tax ensures the well-being of e-commerce economy while safeguard buyers and sellers' rights

The end goal is to help sellers and buyers **reach** out to each other without hassle and constraints



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Basic eCommerce Ecosystem

Digital Platforms

Intermediaries

Government

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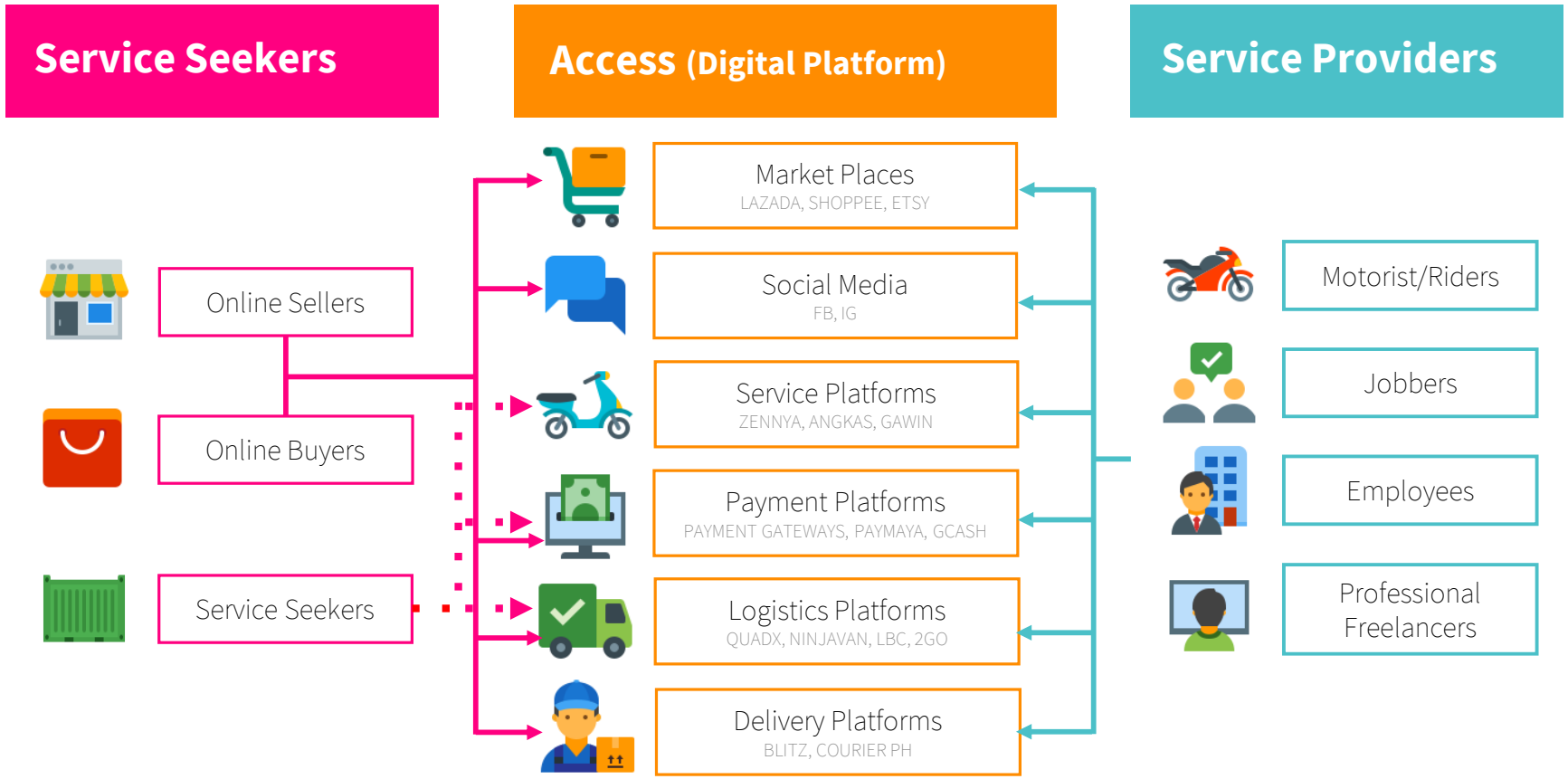
DEFINING THE PLAYERS IN THE PHL E-COMMERCE ECOSYSTEM

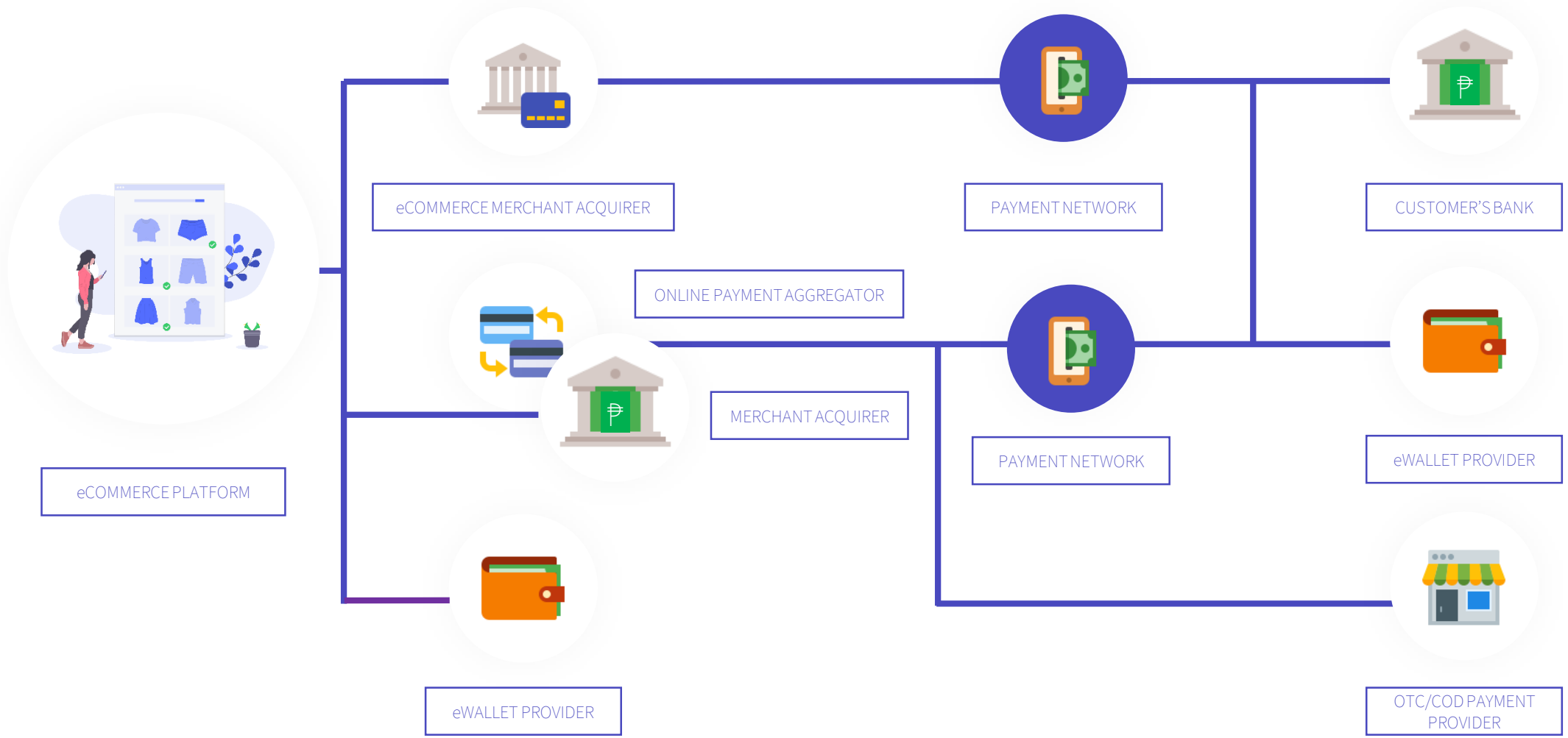
Digital Platforms



Business Relationships

- Crowd-Sourced/GIG
- In-House
- Contract/Agencies

Payment Ecosystem



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DEFINING THE PLAYERS IN THE PHL E-COMMERCE ECOSYSTEM

Payment Ecosystem

E-Commerce Merchant Acquirers

BPI
BDO
SECURITY BANK
citibank
AUB ASIA UNITED BANK
RCBC
Maybank
PayMaya
UnionBank
GCash

Online Payment Aggregators

asiapay
paynamics
stripe
LANDBANK
@dragonpay
globalpayments
ipay88

Payment Networks

mastercard
BancNet
AMERICAN EXPRESS
instaPay
DISCOVER NETWORK
VISA
PESONet
UnionPay 銀联
JCB

Electronic Wallets

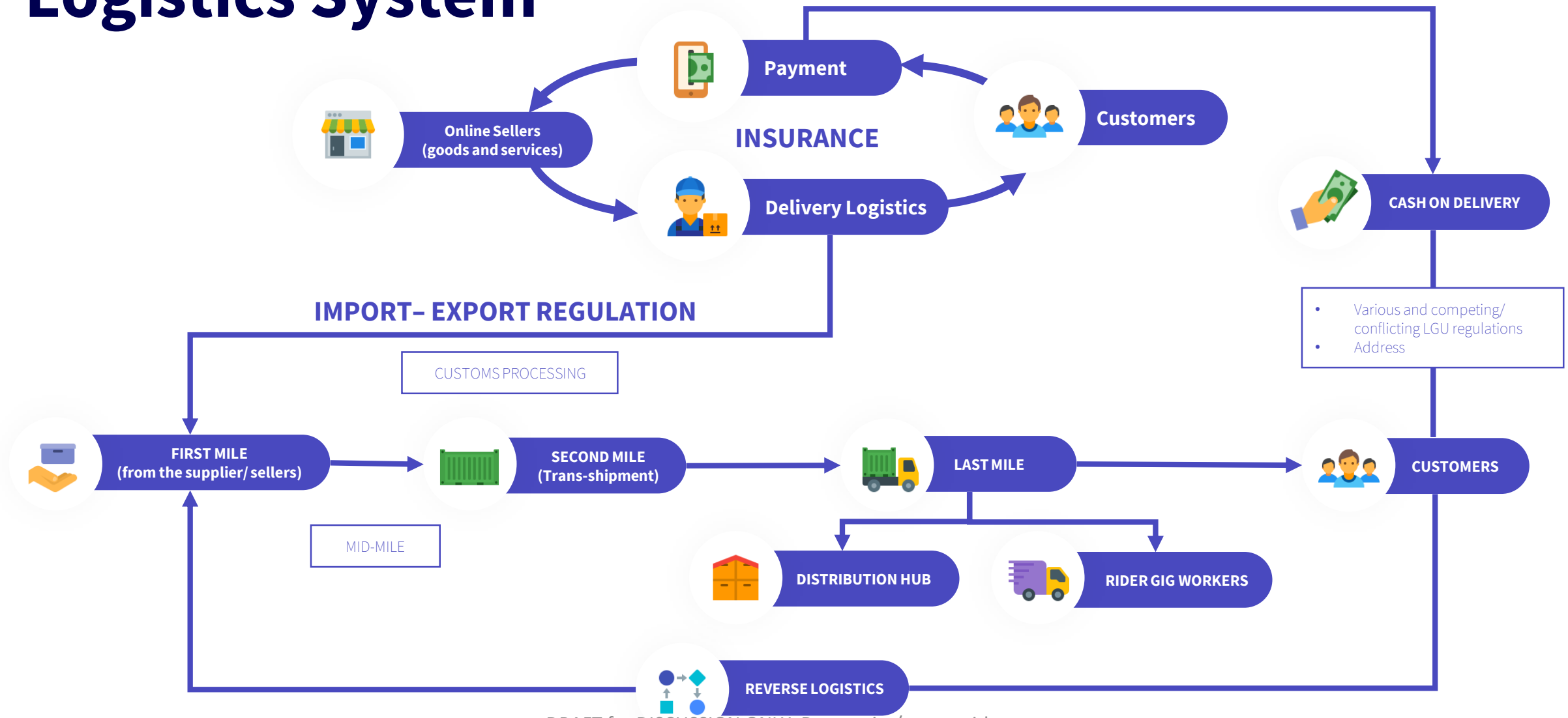
WeChat Pay
PayMaya
GCash
eon
GrabPay
支付宝 ALIPAY
LAZADA WALLET
coins.ph
OMNIPAY BEYOND BORDERS

OTC/COD Payment Providers

pera HUB
BAYAD CENTER
TouchPay
QUADX
ecPAY
truemoney

* Note: This list is just a representation of the ecosystem and is not intended to provide a complete or exhaustive list of providers

Logistics System



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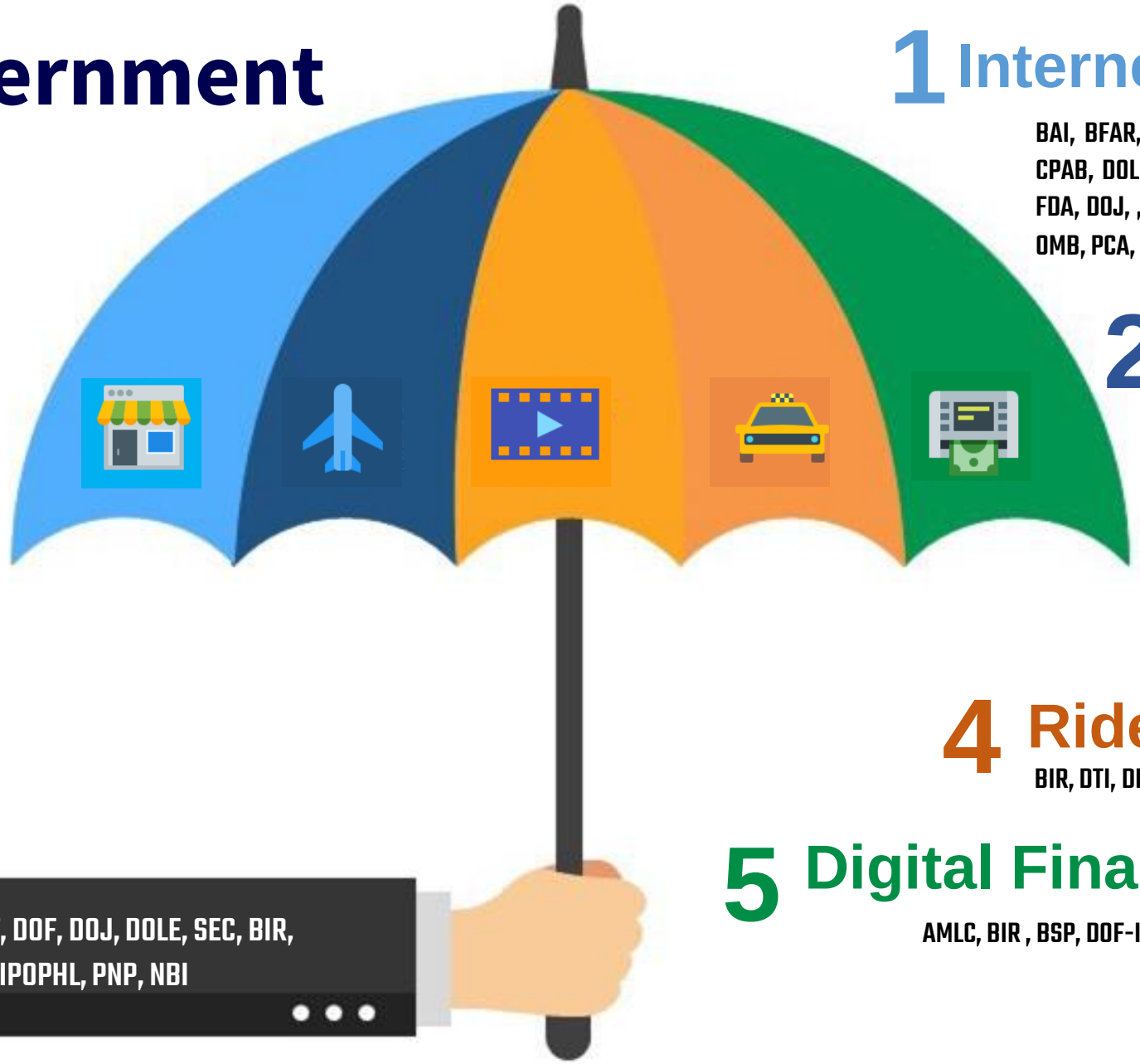
DEFINING THE PLAYERS IN THE PHL E-COMMERCE ECOSYSTEM

Government



DTI, DILG, DICT, DOF, DOJ, DOLE, SEC, BIR, NPC, IPOPHL, PNP, NBI

1 Internet Retail

BAI, BFAR, BPI, BSP, DA-FDA, DepEd, DENR, DICT, DTI-FTEB, DTI-CPAB, DOLE, DOE-CWPO, DOE-ERC, DOE-OIMB, DOH-CHDMM, DOH-FDA, DOJ, , DCOM, EPIMB, IPOPHL, NBI, NFA, NMIS, NPC, NTC, LGUs, OMB, PCA, PDIC, SEC-CFD, SRA.

2 Online Travel

BI, BIR, CAB, CAAB, CAAP, DFA, DICT, DILG, DOLE, DOT, DOTr, MARINA, NBI,PCG, PNP, DOT-TPB, SEC.

3 Digital Media

BIR, DICT, DOLE, DTI, FDCP, IPOPHL, MTRCB, NBI, NPC, OMB, PIA, PNP, PHILRACOM, SEC, GAB, PAGCOR, PHILRACOM, DILG.

4 Ride Hailing

BIR, DTI, DICT, DOTr, DOLE, LTO, LTFRB, PCC, SEC.

5 Digital Financial Services

AMLC, BIR , BSP, DOF-IC, CDA , SEC

eCommerce Philippines 2022 Roadmap Outline

- Vision for 2030
- End of plan targets and revised metrics
- Strategic Framework
- Strategies
- Initiatives/Programs

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Vision by Stakeholders

DIGITAL PLATFORMS

According to Platforms

By 2030, e-commerce in the Philippines is ***"Plug & Play"***—safe, reliable, easy to use, and efficient — available nationwide, especially in areas not easily reached. Ecommerce in the Philippines shall be supported by a national/ universal IDs, faster access to internet, better infrastructure (roads, public transport). With majority of MSMEs are able to sell quality goods online to buyers, confident of timely delivery and remitting payment online.

By 2030, platforms comparable with other e-commerce platforms with other countries

By 2030, e-commerce in the Philippines is the new mindset for Filipinos.

LOGISTICS

According to Logistics Services Providers

By 2030, logistics services in the Philippines shall be the ***most efficient, fastest,*** and the cost of which shall be the ***lowest*** in Southeast Asia

PAYMENT GATEWAYS

According to Payment Gateways

By 2030, the Philippines is a ***cashless society***—buoyed by revenues from eCommerce— and driven by seamless customer experience, convenient, inter-operable, verifiable, auditable, with a secure digital connectivity infrastructure. All goods and services are available online and accessible to all.

"eCommerce" is indistinguishable from "Commerce"

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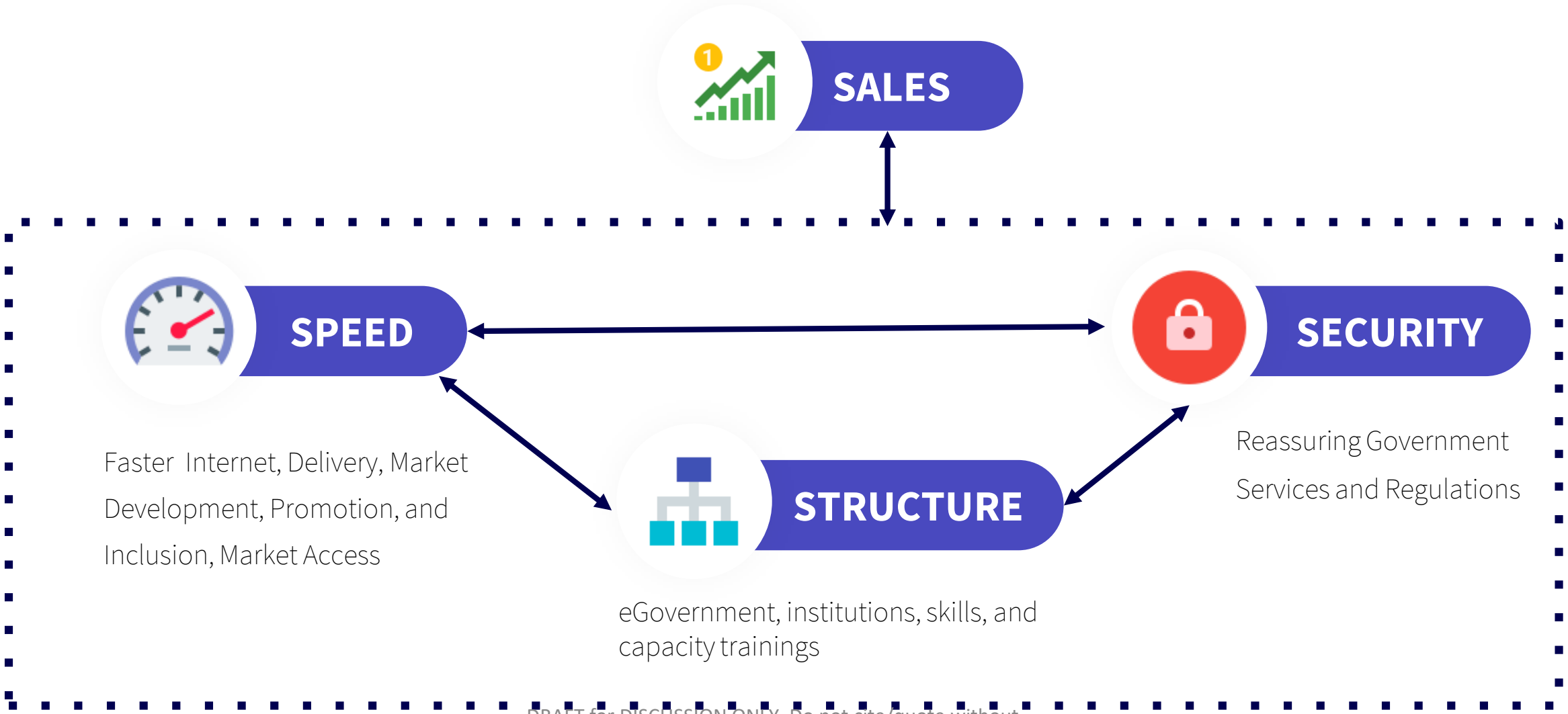
Framework for PECR 2022



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eCommerce Philippines 2022 STRATEGIES

Speed

E-Commerce gives consumers access to time-saving options through swift transactions and delivery of products and services.

Increase the speed of reliable and affordable internet; Broaden Internet Access,; Reduce Broadband Cost; Address Common Towers Policy

Encourage investments in telecommunications and value added services investments (new players)

Update the National Broadband Masterplan , Telecommunications Law and NTC Charters to be responsive to the demands of users

Maintain regulatory environment that supports innovation

Scale up innovation and use of advanced technologies

Increase speed of Transactions and Payments, revisit e-transaction laws and develop enforcement mechanisms

Accelerate the Government E-Payment Implementation Plan

Develop E-payment systems for B2G

Encourage government-linked companies' use of E-Procurement

Improve delivery and logistics systems; transport and logistics infrastructure

Rationalize policy on obtaining licenses for messengerial and delivery services

Reduce border clearance and lead time for inbound and outbound parcels

Abolish truck ban

04/03/2020

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Security

In eCommerce, trust between consumers and sellers is fundamental

Inform the public about the benefits of eCommerce. Conduct a massive information campaign on the existence of existing laws that protect online sellers and buyers in order to promote ecommerce growth

Improve Internet Government Towards Trustworthy and Secure E-Commerce. Deploy blockchain to reduce fraud. Promote the use of digital signatures.

Strengthen cybersecurity among businesses. Enhance cyber security orientation.

Enact laws and update regulations on consumer protection for internet transactions. Provide mechanisms to guard consumer against fraudulent/illegitimate online vendor. Revisit existing policies to ensure that internet transactions are safe.

Enforce strictly online violations against intellectual property rights and data protection laws. Platforms/marketplaces must provide meaningful and genuine choice to consumers.

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Structure

We are building a future ready government, with a private sector that shall thrive in the digital economy and a citizenry whose skills are aligned with the requirements of Industry 4.0

Create a competitive B2C ecommerce ecosystem to attract foreign investments

Promote E-Government that will thrive in the digital economy, where citizens are provided greater access to public services that are faster, efficient and effective.

Encourage Ease of doing business in obtaining licenses and clearances, business registration for ecommerce businesses. Streamline government approvals for business permits and licenses

Generate more IT skills and Industry 4.0 workforce. Include digital literacy, ecommerce in the curriculum.

Gear up for emerging business trends such as the rise of gig economy, mobile commerce, social commerce

Promote a Nationwide logistics zoning system, and consider enabling policy for eCommerce logistics hub . Work towards a standardized address system

Promote financial inclusion in the country. Increase the number of Filipinos with accounts with a financial institution or with a mobile money service provider.

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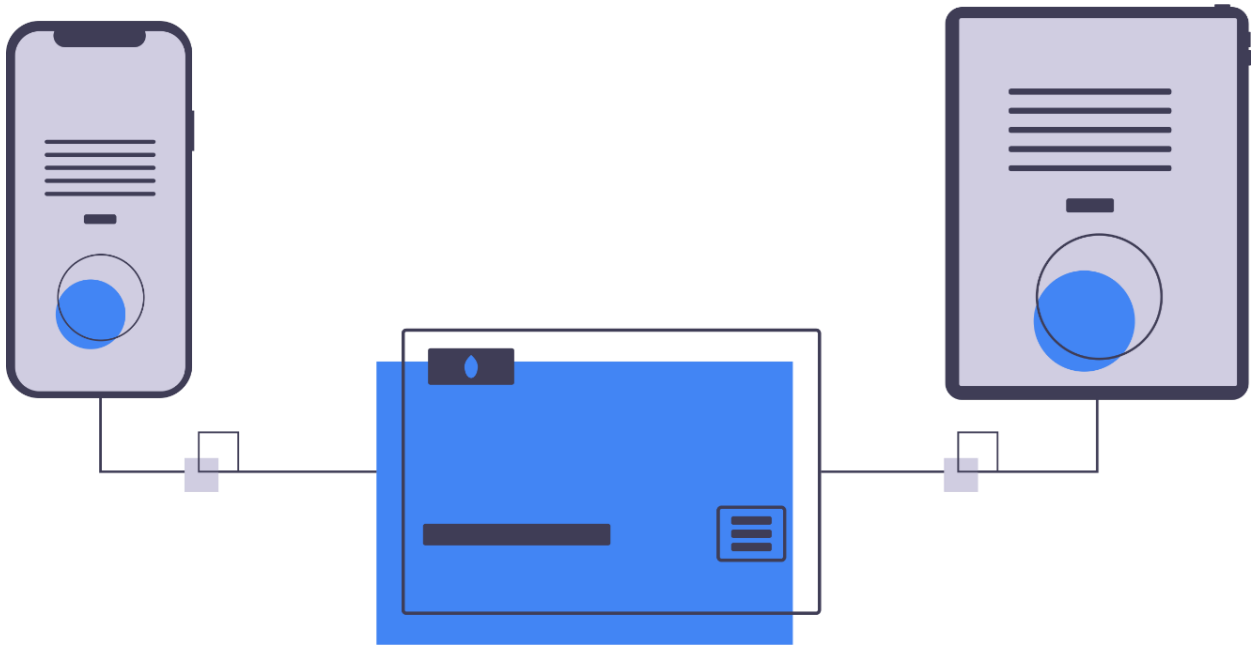
How should we measure our success?



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Review of eCommerce Roadmap Metrics

PECR 2020

1. 25% to the country's Gross Domestic Product by 2020
2. 100,000 Micro, Small, and Medium Enterprises doing e-commerce
3. 40 – 50% of internet users doing e-commerce
4. Fast and competitive internet access
5. Cybercrime enforcement and protection
6. Online and connected government (G2G, G2B, G2C, G2E)

Ecommerce Philippines 2022

1. Employment
2. Gross Merchandise Value (GMV)
3. Number of online sellers
4. Number of eCommerce shoppers
5. Account ownership at a financial institution or with a mobile-money-service provider (% of population age 15+) (Source: WB)
6. Individuals using the Internet (% of population) (Source: International Telecommunication Union, ITU)
7. Postal Reliability Index (Source: Universal Postal Union, UPU)
8. Secure Internet servers (per 1 million people) (Source: Netcraft)

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Proposed eCommerce Strategic Initiatives

04/03/2020

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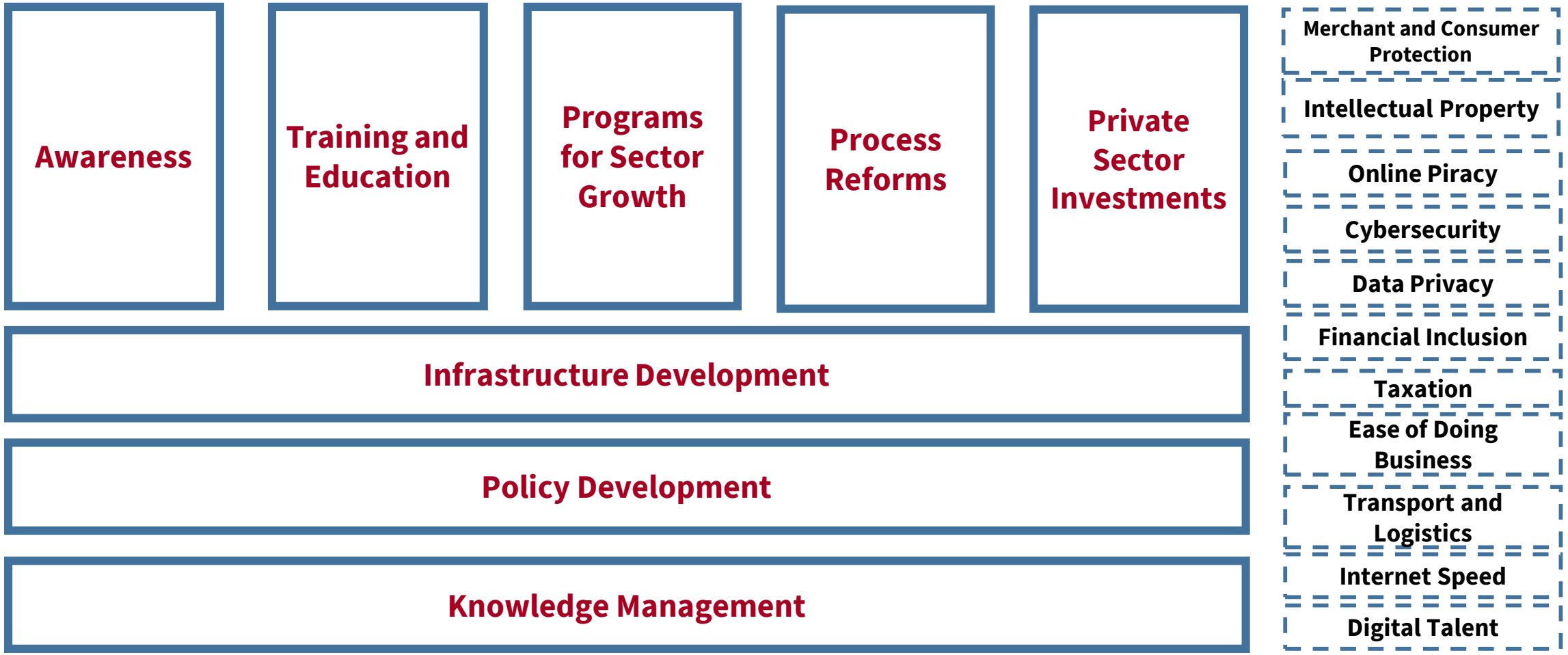
Initiatives across the 3S' Strategies



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POLICY

- Stronger Online Complaints mechanism
  - for digital service
  - to address products issues/concerns by clients
  - to reduce long wait for product replacements
  - escalation process (similar to banking industry)
- Define mass media,
- Encourage online invoice & or for fast and simple issuing by online merchants
- Penalties against fraudulent sellers and buyers/customers
- Rules prescribing transparency on product information, specifications and labelling in every goods and services sold online
- Gig Economy
  - Government support for gig workers (such as grab, angkas riders etc) with regards to logistics such as policies clarifying regulation type, social safety nets, penalties (colorum or formal?), taxation, incentives
  - Review BMBE law and evaluate which provisions impede gig workers to onboard
  - Pursue grants of life and accident insurance for both the rider and customers

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POLICY

- CMTA for ecommerce
- Incentives:
  - for expansion of air freight capacity
  - financial support policy for start-ups /new business registration
- Abolition of truck ban
- enabling policy for ecommerce logistics hub
- Address high shipping costs; shipping delays: congestion on roads, ports and lack of capacity
- Reduce abuse of de minimis
- Syndicate measures to prevent fraud (sellers/buyers)
- Reduce cases of loss of COD payments
- integrate invoice payment
- (clearer) guidelines for customs clearance of inbound cross-border ecommerce goods

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AWARENESS

Information/Education/ Communication campaign on:

- eCommerce 101; Benefits of eCommerce
- Digitalization of MSMEs:
  - Basic
  - Intermediate
  - Advance
- Raise awareness regarding the existing rules and process when companies implement promos on digital platform
- "Kontra Contraband" for platforms with third-party sellers (or even counterfeit)
- data privacy and cybersecurity
- digital literacy for Senior Citizens
- fraud prevention among both sellers and buyers
- financial inclusion and benefits of online transactions and e-payment

Information/Advocacy/Campaign on logistics related topics

- Incoterms to logistics players
- import-export procedures and customs requirements

Development of a government portal to consolidate ecommerce related policies, programs, and projects

- guidelines for customs clearance of inbound cross-border ecommerce goods
- standards of product information, specifications,, and labelling

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EDUCATION

- Revise curriculum to generate industry 4.0 (ecommerce-IT related savvy workers)
- Graduate programs for logistics management

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TRAINING

- I3s Skills Initiative – eCommerce; Logistics Services
- eNegosyo bootcamp

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KNOWLEDGE MANAGEMENT

- Generate data/statistics
  - Number of individuals using the internet – internet user data
  - account ownership at financial institution or with a mobile-money service provider
  - Secure internet servers
  - Postal reliability
  - turnaround time of delivery transit per area
- Develop “delivery index” (similar concept to grab ETA from pick up location to drop off location) for logistics infrastructure
- Study/Review of domain cost/ management
- Study on providing insurance for loss of goods or damage due to transport
- Study how to reduce multiple stops resulting to higher chance of damages and return
- Feasibility study of having an integrated KYC database with national ID (fintech)

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INFRASTRUCTURE

- Address limited access to different logistics services to some areas in the country
- Improve internet infrastructure and connectivity
  - Network coverage (speed and reliability)
  - Limited coverage in remote areas (no internet service in some parts of the country especially rural areas
  - Limited access of internet even in urban areas
- Improve speed inconsistency of the internet across the country
- Enhance freeport zones to offshore logistics transaction hub
- Reduce instances of non-acceptance of cashless payments (always offline)

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INVESTMENT

- Promote investments in ecommerce logistics hub similar to Alibaba digital hub
- Public/private sector investments in warehouses (designed to cater ecommerce transactions)
- “Transport Management System” - PhilPost

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PROCESS REFORMS

eGovTech (BIR, BOC, PhilPost, starting a business agencies)

- Negosyo Center Online Portal

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PROGRAMS

- **“Building Trust” Program**
  - **To help consumers validate that the seller is legitimate, with positive reputation, and can consistently deliver goods (and not just on a first launch)**
  - **"picture mo produkto, process ko” (payment/account validation)**
  - **ensure the quality of goods is maintained upon pick-up to delivery**
  - **verify a consumer’s identity against the payment method used for a transaction**
- **“Integrity Program”**
  - **To reduce the loss of COD payments**
  - **Kontra contraband for platforms with third-party sellers**
- **“Online Sellers competitiveness” Program**
  - **Raise capability of online sellers to supply**
  - **need for capital or machineries/resources**
  - **Digitalization of MSMEs**
- **“Logistics Services Program”**
  - **Improving last mile**
  - **Philpost (US Postal Service)**
  - **How to reduce logistics cost**

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BASTA ECOMMERCE MADALI

(Market Access. DigitAlization. Logistics Integration)

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