



The new ecosystem of online businesses: eCommerce+ and the opportunities for SMEs

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Goals



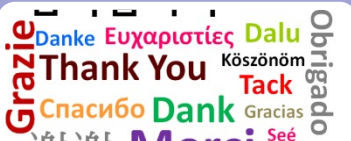
eCommerce situacion in America Latina



State of the art and its impact on PyMEs



The new ecosystem: eCommerce+



Conclusions

eCommerce situacion in America Latina



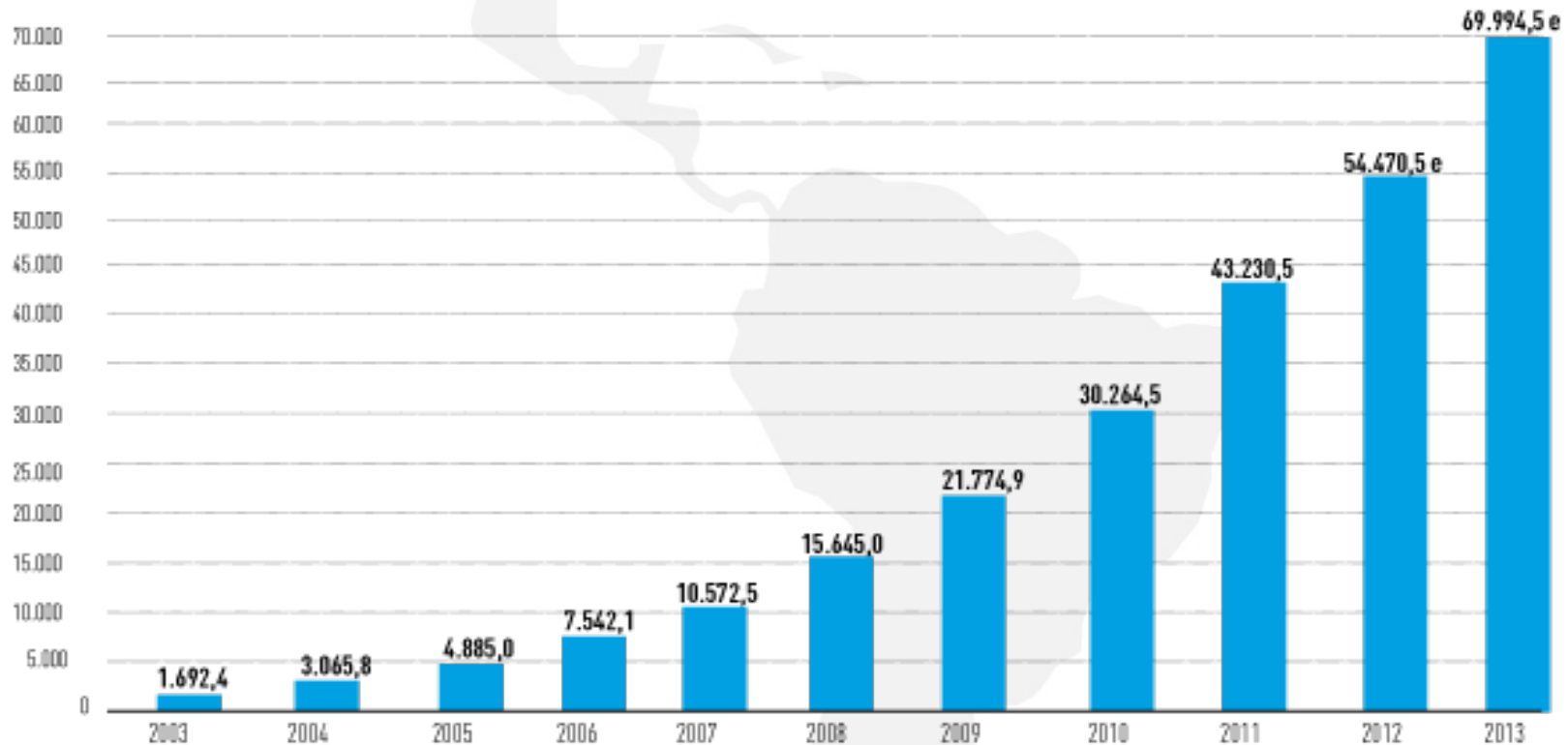
eCommerce strenght around the world



> US\$ 1 BILLION IN 2011

Fuente: "Nothing but Net", JP Morgan
Estudio de e-Commerce regional de América Economía 2012

E-commerce Total Expenditure in Latin America (US\$ million)



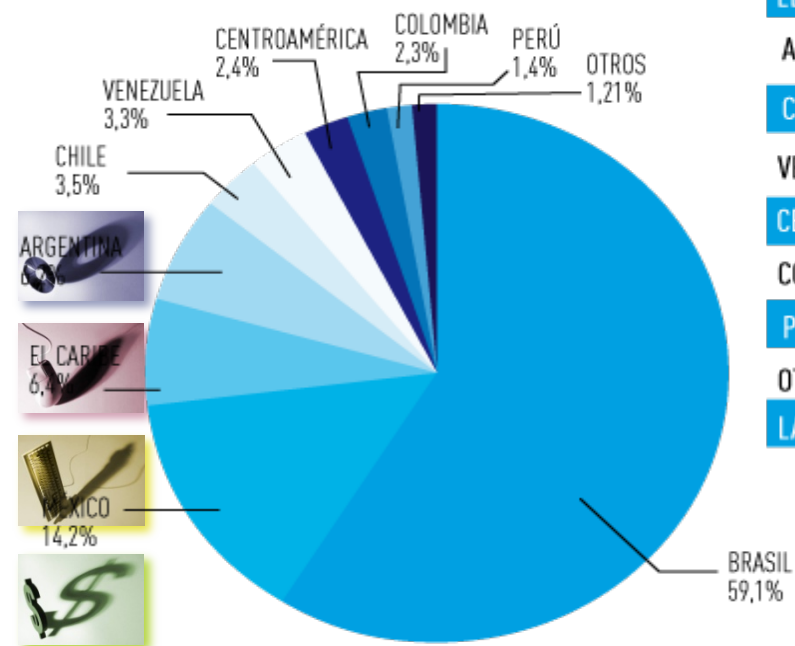
Electronic Commerce continues growing at an accelerated pace in Latin America promoted by Brasil, by Tourism and by big Retailers

Fuente: AméricaEconomía Intelligence

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Electronic Commerce's strenght by country II

Share by country in the Total Expenditure of regional B2C



	2005	2006	2007	2008	2009	2010	2011
BRASIL	2.269,9	3.540,5	4.898,7	8.572,6	13.230,4	17.851,4	25.552,8
MÉXICO	567,1	867,6	1.377,0	2.010,0	2.624,9	4.330,5	6.137,1
EL CARIBE	731,0	949,3	1.104,9	1.244,7	1.455,9	1.895,5	2.752,0
ARGENTINA	240,9	378,1	561,5	732,8	875,0	1.797,6	2.695,3
CHILE	242,8	471,8	687,5	919,5	1.027,9	1.141,6	1.489,9
VENEZUELA	253,4	489,6	821,5	787,8	906,1	1.117,8	1.418,4
CENTROAMÉRICA	189,2	359,9	499,0	563,9	637,2	729,6	1.051,0
COLOMBIA	150,3	175,0	201,3	301,9	435,0	606,8	998,0
PERÚ	109,1	145,5	218,2	250,9	276,0	426,9	611,0
OTROS	131,3	164,8	203,0	260,9	306,5	366,9	525,0
LATAM + EL CARIBE	4.885,0	7.542,1	10.572,5	15.645,0	21.774,9	30.264,5	43.230,5

**Countries /regional blocks , B2C in
millions of US\$**

Electronic Commerce's strenght by country III

B2C Ecommerce Sales in Latin America, by Country, 2010-2016

billions

	2010	2011	2012	2013	2014	2015	2016
Brazil	\$12.23	\$16.25	\$19.81	\$23.07	\$27.47	\$29.82	\$31.88
Mexico	\$3.02	\$3.99	\$5.02	\$5.88	\$6.78	\$7.74	\$8.69
Argentina	\$1.73	\$2.57	\$3.39	\$4.34	\$5.38	\$6.35	\$7.11
Other	\$5.25	\$6.89	\$8.60	\$10.05	\$11.58	\$13.20	\$14.75
Latin America	\$22.23	\$29.70	\$36.82	\$43.34	\$51.21	\$57.10	\$62.42

Note: includes travel, digital downloads and event tickets; excludes online gaming; numbers may not add up to total due to rounding

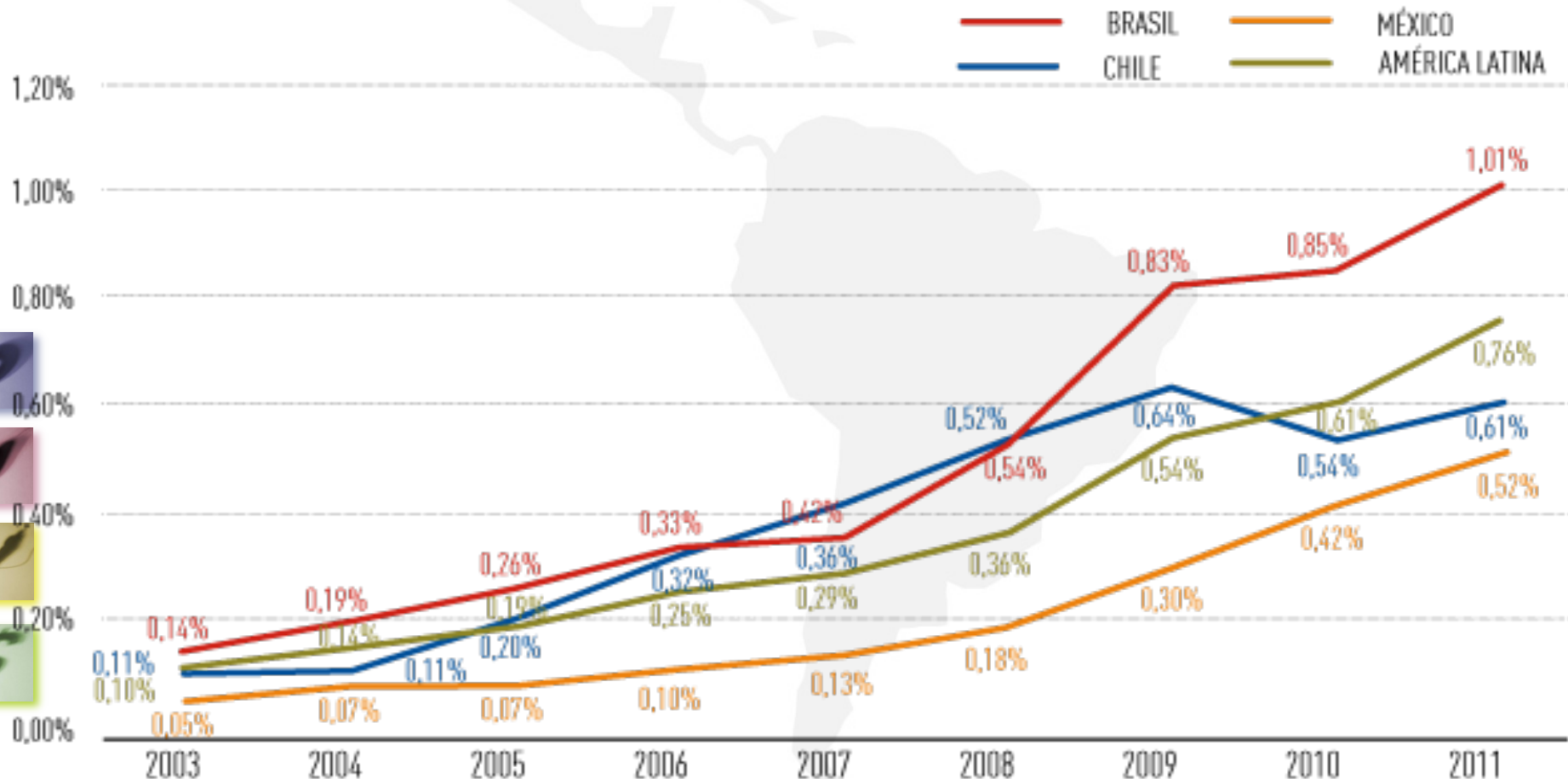
Source: eMarketer, July 2012

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www.eMarketer.com

Electronic Commerce's strenght by country I

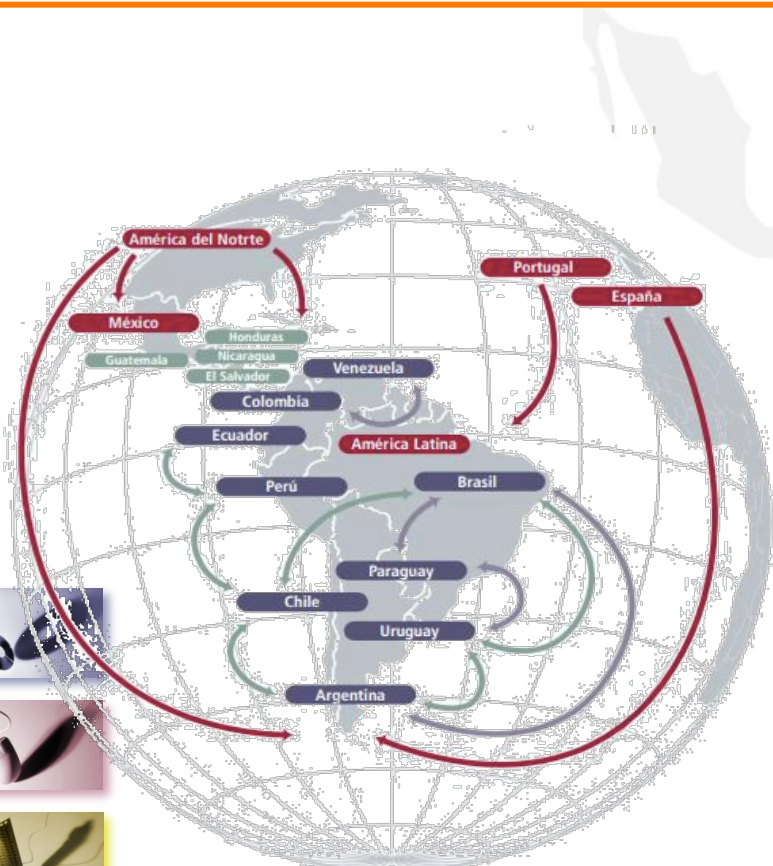
Electronic Commerce growth B2C as a percentage of PIB



Fuente: AméricaEconomía Intelligence

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Mercosur and the cross-border Electronic Commerce



eCommerce
Extrazona,
8,68%

eCommerce
Intrazona,
0,87%

eCommerce
Nacional,
90,45%

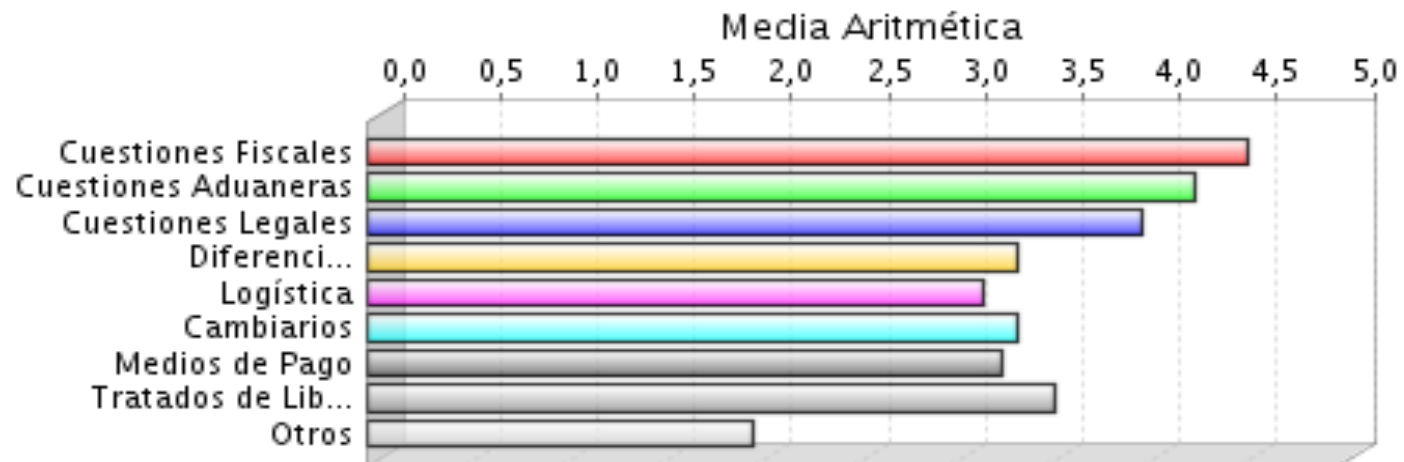
➔ **The cross-border Electronic Commerce B2C exceeds in 8% both EEUU and China purchases**

➔ **The cross-border eCommerce B2C intrazone is less than 1%**

Fuente: eInstituto

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Califique las siguientes categorías en función de su implicancia para el desarrollo del comercio electrónico transnacional, Utilice valores del 1 al 5 (siendo 1 lo menos significativo y 5 lo mas significativo):



Fuente: eInstituto

Ranking	Participación de Mercado		Diferencia Marketshare
	1º. Sem/08	2º. Sem/09	
Top 1	41,5%	36,0%	-5,5%
Top 10	76,3%	74,1%	-2,3%
Top 20	85,6%	83,8%	-1,8%
Top 50	91,9%	90,3%	-1,6%
Long Tail (PyMEs)	8,1%	9,7%	1,6%

Fuente: camara-e.net e ebit (Brasil) / 2009

The Electronic Commerce Ecosystems evolution in the Region clearly promotes the entrance of SMEs on online sales. It also impacts on the decentralization of net revenue in e-commerce.

Brazil decentralization of Electronic Commerce, with a high impact and participation on PyMEs and entrepreneurs is a reality in all the countries of the Region.

Indicators of Digital Economy in LATAM

PAÍS	POB. (MM)	PIB PER CÁPITA (US\$)	% POB. ENTRE 25-35 AÑOS	% USUARIOS DE INTERNET	VOLUMEN DE MERCADO	LÍNEAS DE TELÉF. FIJOS POR CADA 1.000 HAB.	TELEF. MÓVILES POR CADA 1.000 HAB.	COMPUTADORES POR CADA 1.000 HAB.	CONEXIONES A BANDA ANCHA POR CADA 1.000 HAB.	PRECIO DE LA BANDA ANCHA (US\$)	INFRAESTRUCTURA TECNOLÓGICA	TARJETAS DE CRÉDITO POR CADA 1.000 HAB.	TARJETAS DE DÉBITO POR CADA 1.000 HAB.	
ARGENTINA	40,9	10.234,6	16,2	67,4	0,84	231,7	1.295,8	310,0	139,4	30,2	0,85	561,7	530,9	14.588

PAÍS	INFRAESTRUCTURA TECNOLÓGICA	TARJETAS DE CRÉDITO POR CADA 1.000 HAB.	TARJETAS DE DÉBITO POR CADA 1.000 HAB.	CAJEROS AUTOMÁTICOS	BANCARIZACIÓN	% PENETRACIÓN DE BANDA ANCHA MÓVIL	% DE E-CONSUMIDORES	TRANSACCIONES POR INTERNET	ADOPCIÓN TECNOLÓGICA	PAGO DE IMPUESTOS A LA RENTA ONLINE*	GRANDES RETAILERS	FORTALEZA DE LA OFERTA	E-READINESS 2011
ARGENTINA	561,7	530,9	14.588	0,45	8,0	21,6	2.695	0,83	no	5	0,14	0,69	



Regional;

<http://www.einstituto.org/site/novedades/estudio-2012-ecommerce-america-latina/>

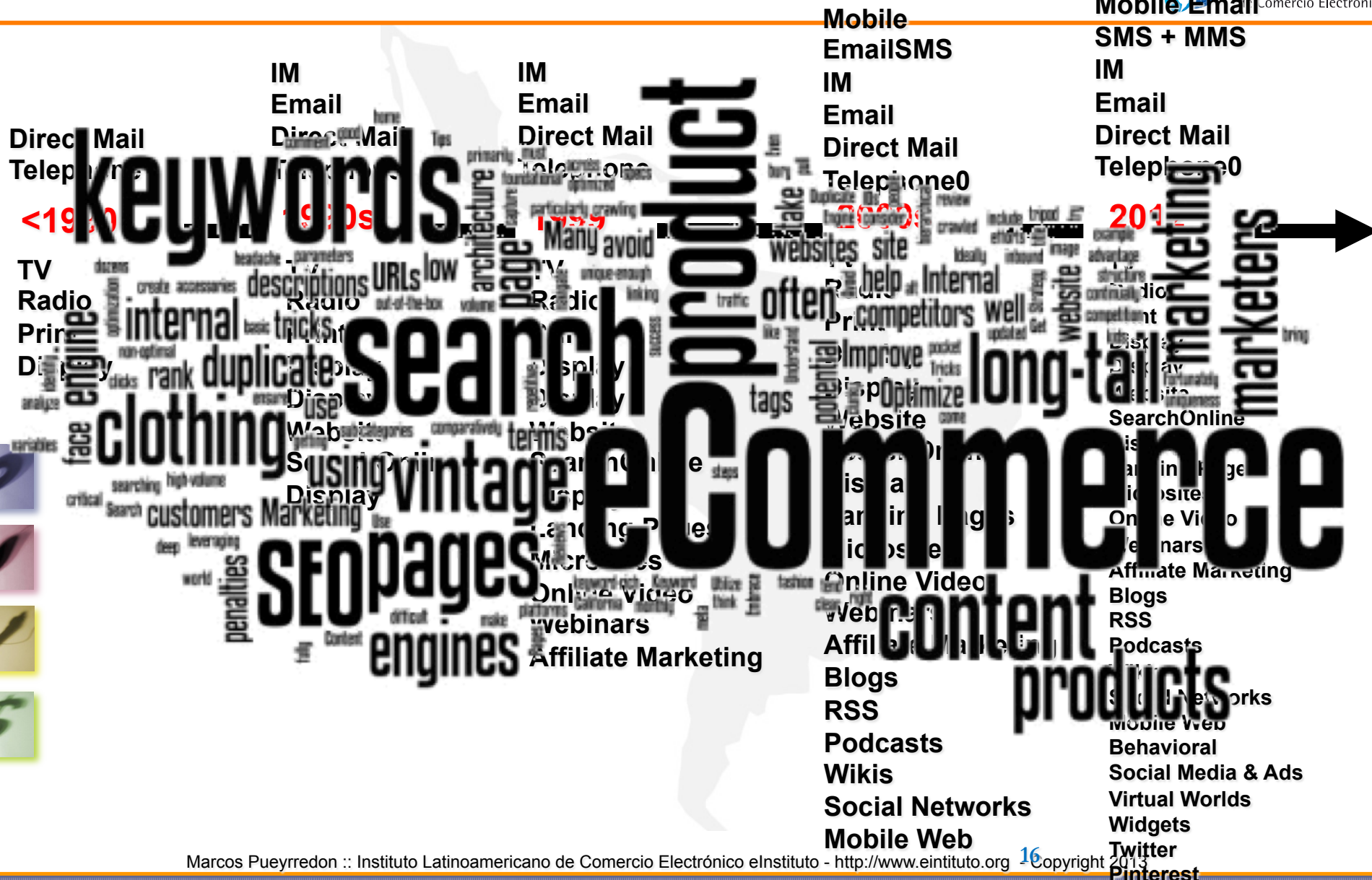
Argentina

<http://www.cace.org.ar/estadisticas/>





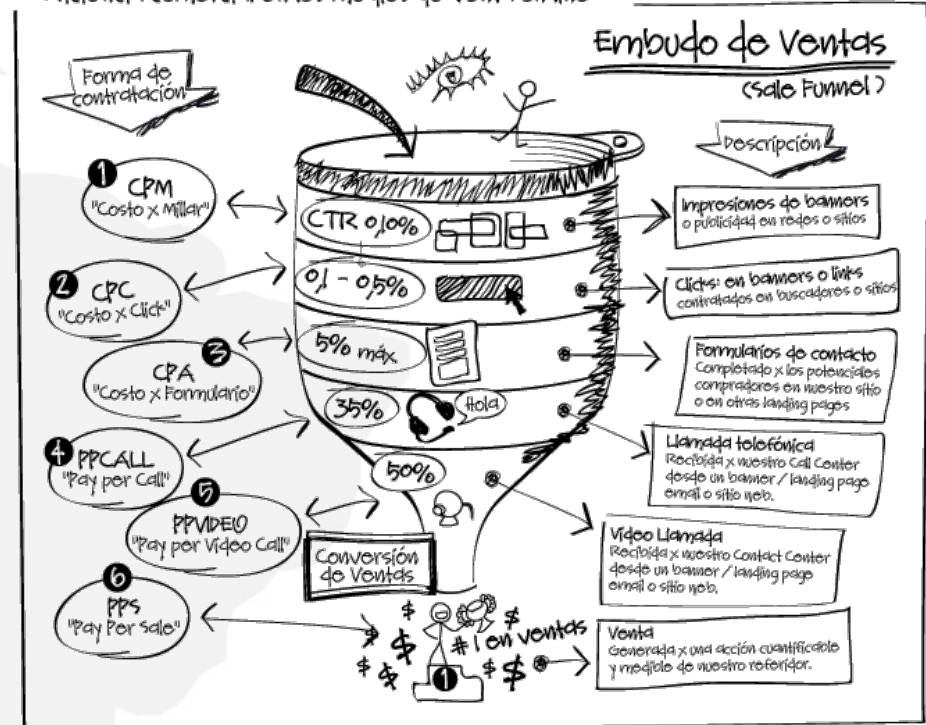
Many questions



What does a Pyme search for in Internet?



"Eficiencia comercial en los medios de venta on line"



Clients = Sales = **Conversion**

What does the consumer search for in Internet?



Fuente: Cybersource

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Current situation of supply and demand

Consumers evolution

Consumers are more clever .

They get more information, are more contact whit
technology and get more demanding every day

Social Web

Mobile

Web Site

Store Kiosk

Call Center

Store POS

Consumer Interactions

Limited

Endless

Source: IBM Global Retail Industry

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Consumers are getting more added value on each point of contact. They are deconstructing the purchase process

Consumer

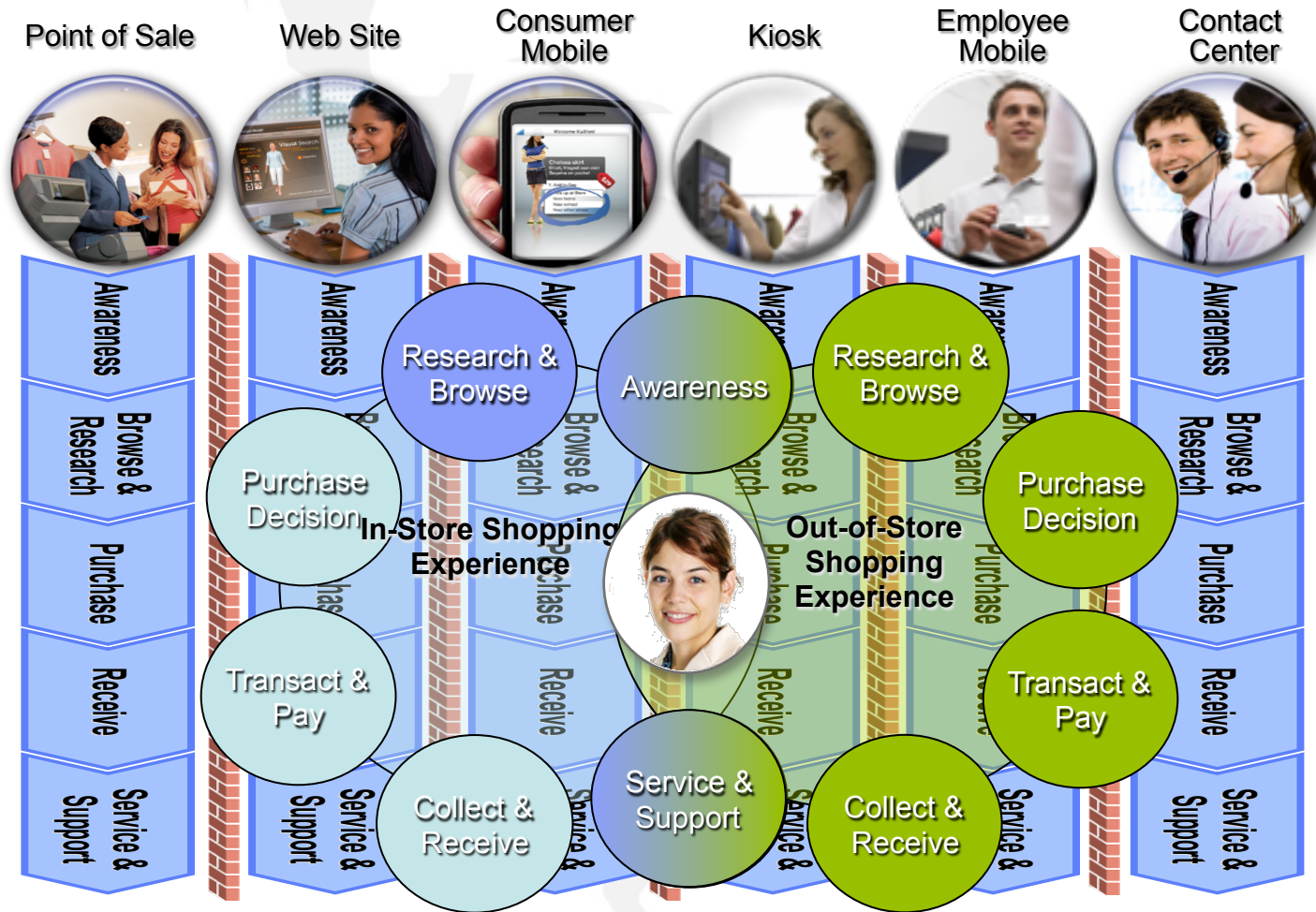
Customer



Source: IBM Global Retail Industry

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To give customers service to all clients as a sole brand, independent of To It's key to the bussiness



Source: IBM Global Retail Industry

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¿How the offer satisfy the consumer in internet?



Technology

- The platform is the product used by clients, the service that we give, and the experience clients live: suitable design, easy to use and database accessible to all.



eMarketing

- Drive traffic and increase conversion rate traffic-registration-transactions, development and clients retention



Logistics and y operations

- Ability for processes triggered in the Front End of the web interface to be resolved correctly on the back-end operations.



Positive experience

- Ability to generate an online shopping experience that meets or exceeds the experience offline.



The 6 apocalyptic horsemen of the eCommerce



Components of an eCommerce System



1) Domain



2) Hosting



3) Technology



4) Means of payment



5) Logistics operator



6) Internet Marketing



7) Safety



8) Operations



9) After sales care



Roadmap: Online Channel B2C Opening



Domain Management



Hosting Management



**Management of the Online Channel
Development**



Structure of the online business HR



Means of Payments Management Process



Logistics Management Process



Business Management Process



Internal Training Process





Goals



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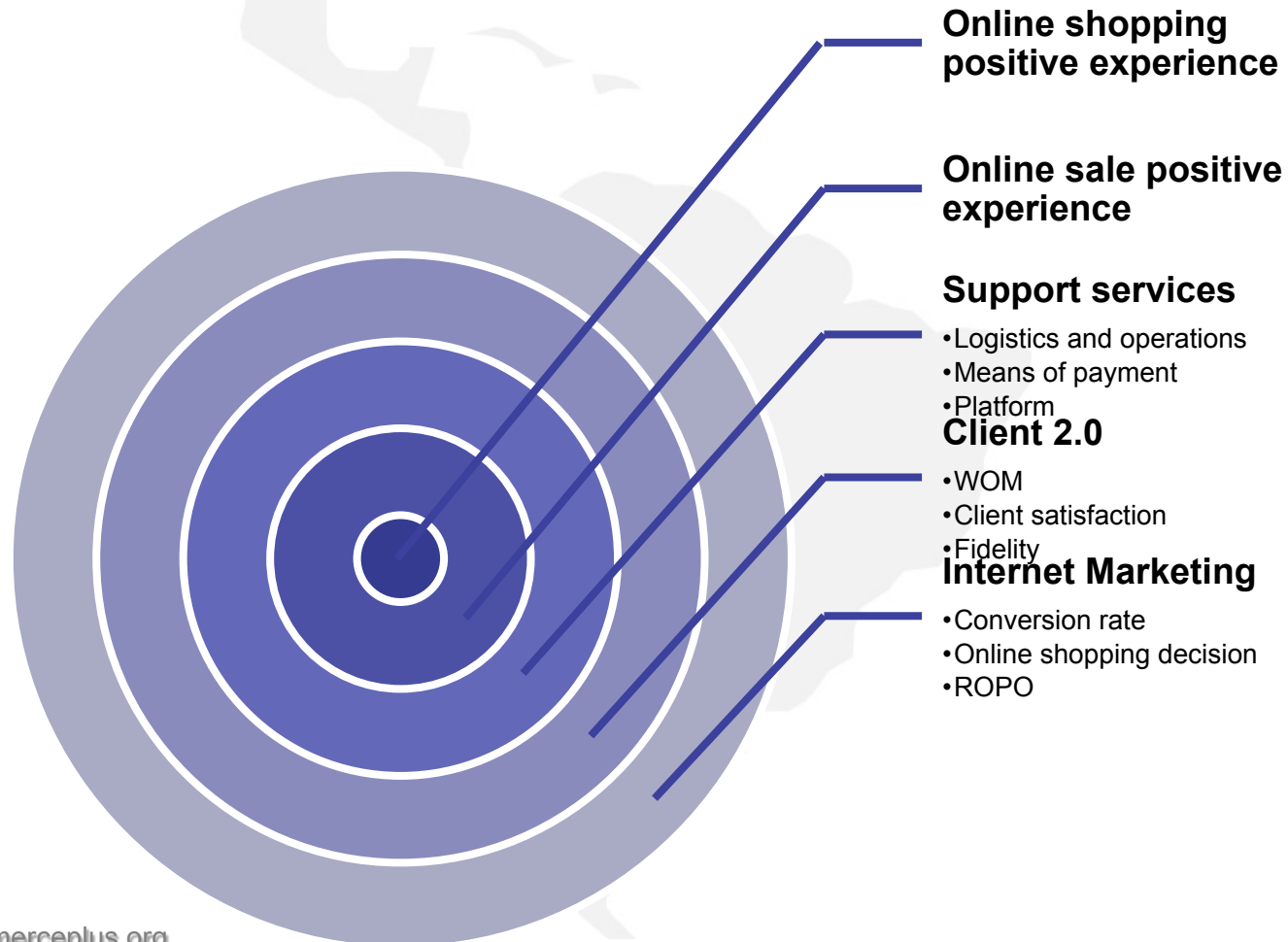


The new ecosystem: eCommerce+



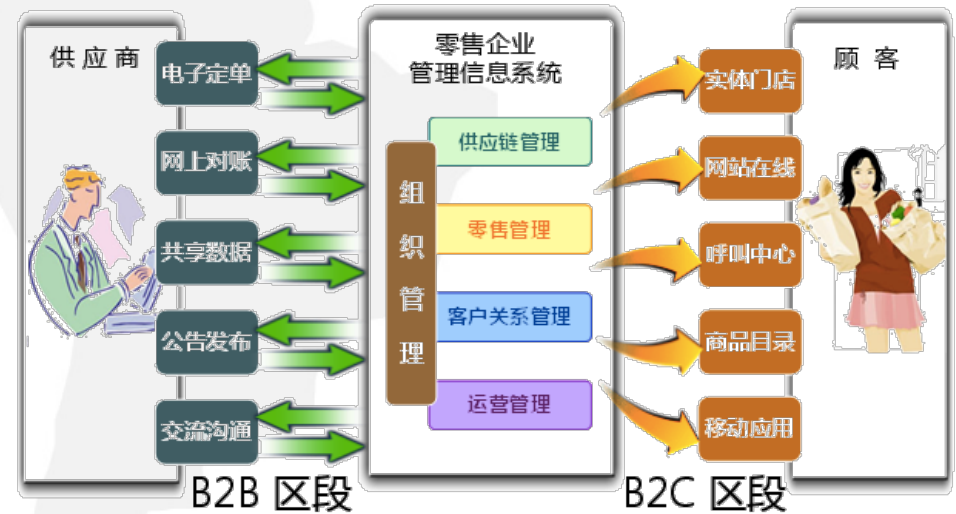
Conclusions

What we call eCommerce + or eCommerce Plus



Fuente: www.eCommerceplus.org

B2B2C





Fuente: www.eCommerceplus.org



Goals



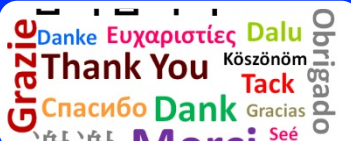
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Conclusions

Exogenous Variables

- Simplifying the tax and customs regime
- Overcome the fragmentation of the consumer protection rules.
- Facilitate dispute resolution and building trust
- Providing solutions of copyright and trademark management

Proving payment systems and logistics.

Promote strategies of "business orchestration versus value chain"

Facilitating the expansion of Offer of products and services sold online

Promote the generation of new business models and innovative business strategies (eg network cluster or B2B2C)

Promote ebusiness good practices

We invite you to feel the online business Latin beats  **eInstituto**
Instituto Latinoamericano
de Comercio Electrónico

 **eCommerce day**



**tour
2013**

CADA VEZ MÁS CERCA

Montevideo, Uruguay

24 eCommerce Day

150 Plenarias

500 Panelistas

138 Empresas premiadas
con los eCommerce
Awards en 6 categorías

1.300 Expertos

270 Talleres

800 Charlas

12 Empresas premiadas
con los eCommerce
Awards en Latinoamérica

Logo of the Fraunhofer Institute for Energy Efficient Buildings (IBB). The logo features a stylized 'f' and 'i' in blue and grey, followed by the word 'institut' in a bold, sans-serif font.

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