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E-COMMERCE LOGISTICS IN THE GREATER MEKONG SUBREGION

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Abstract: The article explores the development of e-commerce logistics in the Greater Mekong Subregion as an example of digital transformation of economic and commercial activity in Southeast Asia. On reviewing the present state and the dynamics of e-commerce-related processes in Southeast Asia, the paper points out salient features of regional economic growth initiatives in synergy with the priorities of the ASEAN Economic Community (AEC) 2025. The substantial and the institutional dimension of the Greater Mekong Subregion (GMS) are discussed in detail. The paper finally turns to analyzing the GMS transport and logistics component in connection with e-commerce practices across the GMS area. The article does not aim to discuss the e-commerce and the economic corridors of the GMS apart from each other, which has been done by other researchers. Instead, the analytical focus of the paper, namely, a synergy between e-commerce, transport and logistics exemplified by the GMS cooperation, accounts for its academic novelty. The author argues that owing to the resources and assets that move beyond digitalization per se, China is likely to be the key beneficiary of the current demand for synergizing e-commerce with transport and logistics transnational infrastructure shared by Southeast Asia. Although this conclusion confirms earlier assessments, the GMS e-commerce logistics example convincingly demonstrates that Southeast Asia increasingly becomes a PRC-oriented area of economic and commercial activity.

Keywords: *ASEAN Economic Community, Greater Mekong Subregion, e-commerce, economic corridors, transport, logistics*

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Научная статья. Политические науки

ЛОГИСТИКА ЭЛЕКТРОННОЙ КОММЕРЦИИ В СУБРЕГИОНЕ БОЛЬШОГО МЕКОНГА

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Аннотация: В статье проанализировано развитие логистики в Субрегионе Большого Меконга (СБМ) как пример цифровой трансформации экономической и коммерческой деятельности в Юго-Восточной Азии. Проведя обзор современного состояния и динамики развития электронной коммерции в Юго-Восточной Азии, статья выявляет специфику региональных инициатив, нацеленных на стимулирование экономического роста, в их увязке с приоритетами Экономического Сообщества (ЭС) АСЕАН до 2025 года. Подробно рассмотрены содержательная и институциональная составляющая проекта СБМ. Заключительный раздел статьи посвящен анализу транспортно-логистической составляющей СБМ в ее увязке с практиками электронной коммерции на пространстве СБМ. В статье не ставится задача обсудить отдельно друг от друга вопросы, связанные с развитием электронной коммерции и экономических коридоров на пространстве Субрегиона Большого Меконга, что уже сделано другими исследователями. Научная новизна работы определяется ее исследовательским ракурсом, а именно синергией развитие электронной торговли, транспорта и логистики, а также их взаимной увязки, на примере сотрудничества в СБМ. С точки зрения автора, наличие у Китая ресурсов и активов, не относящихся напрямую к цифровизации, позволяют ему стать основным бенефициаром современного запроса государств ЮВА на интеграцию инструментов электронной коммерции, транспорта и логистики. Хотя этот вывод подтверждает уже существующие оценки, развитие логистики электронной торговли на пространстве СБМ служит убедительным примером того, что Юго-Восточная Азия становится ареной повышенной проницаемости для экономической и деловой активности КНР.

Ключевые слова: *Экономическое Сообщество АСЕАН, Субрегион Большого Меконга, электронная коммерция, экономические коридоры, транспорт, логистика*

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The digital transformation of economic, commercial and social processes gains momentum in Southeast Asia. Both ASEAN and its member states pay serious attention to the Fourth Industrial Revolution and its implications, as the latter can bring ASEAN both benefits and reasons for concern.

In this context, e-commerce is of special significance. The region is a hub of economic and business activity in which e-commerce matter a lot. Nevertheless, due to infrastructure deficiencies, part of which relates to logistics, e-commerce cannot realize its full potential, to the disadvantage of ASEAN and its member states.

To deal with the problem instrumentally, an integration of e-commerce and logistics-related activities to what has been developed in the region for a long time may be beneficial. In the realities of Southeast Asia, it relates to transnational economic growth initiatives. Among them, the Greater Mekong Subregion (GMS), a project that covers a vast geographical area that embraces the Indochina states and the PRC's southern provinces, deserves special attention.

E-commerce in Southeast Asia: Major Trends

E-commerce is a hot topic across Southeast Asia. Apart from commercial benefits per se, it allows making the region an attractive production and consumption area, to the advantage of ASEAN, its member states and dialogue partners. E-commerce is highlighted in ASEAN key documents, including ASEAN Economic Community Blueprints 2015 and 2025, Master Plans on ASEAN Connectivity adopted in 2010 and 2016, and ASEAN Digital Masterplan 2025. For the association, e-commerce is all the more significant since it can strengthen ASEAN's positions as the driving force of the Regional Comprehensive Economic Partnership (RCEP). As an efficient instrument for raising international competitiveness, e-commerce is part of the modernization agendas set by the governments of Southeast Asian states.

This vision is substantiated by impressive figures. According to Statista, from 2019 to 2022 the value of e-commerce market increased from roughly 43 to approximately 131 billion dollars[1]. The scale factor is further evidenced by average monthly visits to e-commerce platforms (as of 2020): 281.38 million for Shopee, 137.14 for Lazada and 88.9 million for Tokopedia respectively[2]. As digital regionalism projects, including those in the RCEP framework, gain traction, these figures are likely to further increase.

Summing up main reasons behind the rise of e-commerce in Southeast Asia, the following are worthy of note. First, the region is experiencing a consumption boom. Although these processes are developing unevenly, urbanization, the middle class formation and a decrease in poverty are notable trends. Revealingly, between 2012 and 2021, the proportion of population below the poverty line in the Philippines, Vietnam and Indonesia decreased from 25.2%, 11.1% and 12.0% to 18.1%, 4.4% and 10.1% respectively[3]. This factor demonstrates a higher level of disposable income and adds to discretionary spending.

Among Southeast Asian marketing consultants, retailtainment (a synergy of retail and entertainment) is a buzzword. Consumers demand omnipresence, as they want to enjoy seamless shopping. Specifically, immersive experience and personalized services, as well as convenience and immediacy, are high priorities. Responding to these expectations, shopping malls establish different kinds of entertainment centers including indoor theme parks, cinemas, sport clubs, techno-centers for children, video games and e-sports studios, etc. Those activities are digitally enabled, as brands try to accumulate data to make their advertising more efficient, while e-commerce platforms substantiate their range of virtual offerings with physical presence instruments. In these circumstances, e-commerce platforms and brands have broadening possibilities to cooperate.

Since convenience becomes an essential prerequisite for customer retention, omni-channel approach increases in significance. As demonstrated by a report prepared by Facebook in cooperation with Bain and Company in 2022, in the journey of Southeast Asian consumers, online channels account for 80% of the discovery stage, 83% of the evaluation stage and 56% of the purchase stage[4]. As a result, omni-channel shopping is likely to further increase in demand across the region, since, for instance, visits to shopping malls have long been and remain part of weekend family leisure.

In Southeast Asia, e-commerce-related practices are numerous. They include live-streaming e-commerce, expanding online payment options, increasing influence of social commerce, etc. These activities are based on advanced technologies like augmented reality, instant analytics and direct-to-customer marketing[5]. As a result, to respond to ever-increasing expectations of Southeast Asian consumers requires much effort.

Experts distinguish four main types of e-commerce platforms in Southeast Asia: discovery platforms (mostly, commission for advertising), third-party seller platform (linking buyer and seller, but with no responsibility over transactions), third-party seller platform with a first-party store (host buyers and sellers with their stores), direct-to-customer brands (e-commerce stores that sell their own fist-party products)[6]. In the latter regard, the example of Pomelo deserves close attention. The company was established in 2012 as a marketplace, but since then it has evolved in a diversified O2O ecosystem. The company prioritizes omnipresence and accessibility, its self-positioning statement is “Fashion born in Asia. On Trend. Online. On The Go”[7]. In line with this vision, the company undertakes an initiative entitled “partner stores”, which includes cooperation with cafes, florists and other places frequently visited by its target audiences: women between twenty-five and thirty-four. The company aims to make its production affordable to people with average incomes. In addition, transnational expansion, including to countries beyond Southeast Asia, looms large in its order of priority. Overall, Pomelo focuses on online sales, while benefitting from remaining tremendous opportunities presented by brick-and-mortar shopping.

E-commerce is part of a bigger digital ecosystem in Southeast Asia. The system is constantly developing. Specifically, the access to Internet services is rising: between 2012 and 2021, the number of Internet subscribers/users per 100 persons increased from 24.6 to 79.5. Remarkably, Cambodia and Myanmar account for 93.0 and 100.0 respectively[8]. More specifically, an increase in interest in data centers is evident: according to available estimates, “The Southeast Asia data center construction market is forecast to be valued at $3,027 million by 2028 from $2,772 million in 2022”[9]. Finally, industry powerhouses carry out educational projects aimed at facilitating the digital transformation of public services and the corporate sector. Southeast Asian big companies, SMEs and even micro-businesses are digitalizing their activity. Taken collectively, these factors reveal that the potential of digitalization in Southeast Asia is considerable.

At the same time, however, many problems remain serious. Producer and consumer GVC is Southeast Asia are undergoing a resource-consuming transformation. It requires that companies spend much effort and allocate significant financial resources on reorganizing their strategies. Regulations on data localization are not unified, which makes it difficult for extra-ASEAN companies to undertake trans-border data-related commercial activity. Cybercrimes are on the rise, while digital competences to keep them manageable are not sufficient.

Seen from an e-commerce perspective, possibly, the most important obstacle relates to logistics. Owing to its major deficiencies, fast and guaranteed delivery of purchases becomes problematic. To cope with this problem, attempts to adopt e-commerce practices to the already existing foundation may be beneficial. Due to Southeast Asia’s specificity, this foundation is presented by subregional economic projects as operating hubs of economic and commercial activity.

Subregional Economic Projects and the ASEAN Economic Community 2025: the GMS Connection

From a geographic perspective, Southeast Asia is an extended area that includes two parts: the peninsula and the archipelagic. Logically, neighboring countries establish closed enclaves of cooperation aimed at developing local areas based on joint use of production factors: person-power, finance, goods and services, as well as technologies and natural resources. Technically, such projects may include transport corridors, tourist parks, special economic and industrial zones, other forms of commercial exchanges. Several salient features of this kind of cooperation can be addressed specifically.

Deep-rooted ties matter a lot, as economic activity of all sorts is more intensive between neighboring areas than between them and their capitals or national industrial centers. As a result, subregional economic projects extend to selected national territories with preferential tax, customs and investment regimes. Apart from undertaking commercial projects per se, the participating states address socio-economic problems of those areas, as well as jointly develop cutting-edge technologies with a positive multiplier effect on their economies. The experience derived from such activity can be extended to product, process, marketing and organizational innovations in sectors not necessarily related to those developed within the subregional economic projects.

In specific terms, the following points warrant consideration. These projects do not require that their participants change their national trade policies, as well as take on other obligations. More to the point, subregional economic projects are non-discriminatory towards non-participants. These projects do not demand considerable financial allocations and do not involve major political risks. More often than not, subregional economic projects are testing grounds for various forms of public-private partnership, as they allow government agencies and companies to join efforts, while making use of their major competitive advantages.

For the ASEAN Economic Community, subregional economic projects are of profound significance, since they allow achieving several broad objectives. They are congruent with ASEAN’s goal-setting, as both AEC-2015 and AEC-2025 Blueprints have relevant provisions. In the AEC-2025: the part “A highly Integrated and Cohesive Economy” includes “Facilitating movement of skilled labor and business visitors”, the part “A Competitive, Innovative and Dynamic ASEAN" has the provision "productivity-driven growth, innovation, research and development, and technology commercialization". The part "A Resilient, Inclusive, People-Oriented, and People-Centered ASEAN" refers to public-private partnership, while the "A Global ASEAN" aims at developing "a strategic and coherent approach when dealing with external parties". The latter point is especially important owing to a rise of the global component in ASEAN's strategic objectives. The subregional initiatives of economic cooperation, for instance, the Greater Mekong Subregion or BIMP-EAGA, are undertaken in cooperation with ASEAN extra-regional partners[10].

Notably, in the pillar "A Resilient, Inclusive, People-Oriented, and People-Centered ASEAN" of the AEC-2025 Blueprint, the focus is on strengthening the role of micro-, small and medium-sized enterprises (MSMEs). While MSMEs are important engines of economic growth of Southeast Asian countries, their contribution is smaller than it might be: accounting for 97.2% – 99.9% of all companies they contribute only to 44.8% of GDP and 18% of national exports[11]. If subregional economic projects even partially eliminate this shortcoming, the positive aggregate effect will be experienced across the whole Southeast Asia. Lastly, the Part "Enhanced Connectivity and Sectoral Cooperation" outlines exactly what economic subregional projects mostly focus on – transport, energy, ICT, e-commerce, science and technology, etc.

Those factors, both individually and collectively, suggest that the significance of subregional economic projects in ASEAN's priorities and policy is increasing. These projects are built on the regional down-top integration, namely, connections between manufacturing and logistics companies, financial institutions, the public and the private sector etc. Taken together, these factors build a solid foundation for long-term and sustainable economic exchanges with a multiplier effect.

In this context, the specificity of the current stage of ASEAN integration must be considered. Notably, the association realizes that it needs to develop cooperation in the "AFTA Plus" format. Although AFTA has been a remarkable success, the association's major priority is a broader economic and commercial ecosystem aimed at developing ASEAN-centered GVC, as they are a necessary prerequisite for making Southeast Asia a seamless area of economic and business activity. More than that, this format is a reliable risk-hedging mechanism, as the Belt and Road Initiative, while giving Southeast Asian states promising commercial possibilities, may well make the region part of a China-centric area.

Among the subregional economic initiatives developed in Southeast Asia, the Greater Mekong Subregion (GMS) is of special note. This initiative was launched in the 1950s under the auspices of the UN Economic and Social Commission for Asia and the Pacific (ESCAP), but did not gain momentum owing to political instability generated, mostly, by the Second Indochina War and the Cambodian issue. In the 1990s, however, it was re-energized, as the states of Indochina embarked on economic and social reforms. Because of this, the GMS is an example of down-top cooperation.

Simultaneously the top-down vector plays an important role in the GMS evolution. In 1992, the Asia Development Bank launched the Greater Mekong Subregion Economic Cooperation Program with a focus on infrastructure construction in Indochina, as well as human resource development programs for enabling the public and private sector to carry out trans-national projects. In 1998, the development of economic corridors started, while in 2002, following the first GMS Summit, the GMS states adopted First GMS Strategic Framework (2002-2012). It focused on infrastructure development, trans-border trade, investment and tourism, public-private partnership, HRM issues and environment protection.

The top-down vector was reinforced by the Greater Mekong Subregion Strategic Framework 2012-2022 elaborated on by Asia Development Bank. Its key priorities are outlined as "… promoting regional cooperation and contributing to economic growth and poverty reduction as well as to the provision of regional public goods". Adjusting national development plans to the collective benefit of regional integration is its another salient feature[12].

The GMS has a diversified institutional foundation presented by the GMS Summit, the GMS Ministerial Conferences, the GMS Economic Corridors Forum and the GMS Business Forum. Additionally, the Greater Mekong Subregion project has its own Secretariat.

Seen from an AEC perspective, the GMS is of much significance. It can contribute to narrowing intra-ASEAN socio-economic gaps. Specifically, a case in point is the Human Development Index (HDI) which is, according to the UN, "a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and having a decent standard of living"[13]. According to these criteria, gaps between the GMS states and other ASEAN countries, remains significant[14]. For ASEAN, the GMS is a good instrument to improve cooperation with its dialogue partners, as they synergize their initiatives in Southeast Asia with the GMS. Examples include Mekong-Ganga Cooperation, Lancang – Mekong Cooperation, Japan – Mekong Regional Cooperation Program, South Korea – Mekong Comprehensive Partnership for Mutual Prosperity, and the Mekong – US Partnership. Most importantly, the GMS allows ASEAN to develop trans-national connectivity projects, including those in the transport and the logistics sector.

GMS Transport Corridors and E-Commerce Logistics

In the context presented and discussed above, the GMS transport and logistics component is of profound significance. Although ASEAN attaches much importance to carrying out pan-Southeast Asian trans-national transport and logistics projects, which is exemplified, primarily, by Kuala Lumpur Transport Strategic Plan (ASEAN Transport Strategic Plan) 2016-2025, its member states encounter huge infrastructure-related imbalances. At the ASEAN level, this is exemplified by gaps between the positions of Southeast Asian countries in the Logistics Performance Index (LPI). According to the LPI 2018 (the most recent data), Singapore and Vietnam occupied 7th and 39th places with LPI Scores 4.00 and 3.27, while Cambodia and Myanmar accounted for 98th and 137th places with scores 2.58 and 2.30 respectively[15].

To a considerable extent, this outcome is predetermined by differences in perceptions of ASEAN member states of what logistics is and, by extension, how it must be developed. As Tham Siew Yean and Sanchita Basu Das point out, "… ASEAN countries suffer from differences in their understanding of logistics. While for Cambodia, logistics is understood as a combination of transportation infrastructure, logistics service providers, institutional framework and logistics users, for Indonesia it covers business activities ranging from transport and storage, post and couriers and distribution. There is no official definition of logistics for most ASEAN countries"[16]. As transport and logistics are time-consuming and capital-intensive sectors, this factor undermines their development at both the goal-setting and the implementation level.

With respect to the Indochina Peninsular, the GMS territorial domain, two large-scale projects are of special significance. The first is the ASEAN Highway Network. Launched in 1999, this project is supposed to consist of twenty-three links with the overall length of 38400 km and to be integrated in Asian Highway Network. Although a laudable undertaking, it encounters numerous setbacks. Specifically, infrastructure deficiencies coupled with different requirements to licensing trans-national cargo transportation, as well as different standards for road operation and maintenance, play a pivotal role.

The second project is the Kunming-Singapore railway developed by seven countries: Singapore, Malaysia, Thailand, Vietnam, Cambodia, Myanmar and China. The railway is supposed to be seven thousand kilometers long and consist of three routes: the Eastern route embracing Vietnam and Cambodia, the central route through Laos, and the Western route through Myanmar. The idea was launched in 2000, China and ASEAN reached an agreement on the three afore-mentioned routes in 2007. At the same time, the implementation of this project is hampered by many factors, among which infrastructure gaps and insufficient financial support are most important.

For the Association, the ASEAN Highway Network and the Kunming-Singapore railway are valuable instrumental assets. When finalized, they will link seaports, airports, railway and motorway hubs with tourism and investment areas, as well as strengthen links between Southeast Asia and other countries and regions. Most notably, they contribute to the "global ASEAN" narrative, as they strengthen connections between ASEAN and its Eurasian partners. For instance, they instrumentally facilitate dialogue between ASEAN and the EAEU or ASEAN and the SCO.

Although progress is not fast and steady, ASEAN continues developing its transport and logistics projects. The ASEAN Smart Logistics Network (ASLN) launched in November 2020, is a case in point. Among its interim outcomes, Vinh Phuc ICD Logistics Center and Phnom Penh Logistics Complex aimed at making the logistics sector more resilient and, by extension, competitive are examples of excellence. In the years to come, similar projects are likely to appear: the ASLN is synergized with the Master Plan on ASEAN Connectivity (MPAC) 2025, since it directly responds to the MPAC 2025 logistics-related priorities[17].

Concerning the GMS transport dimension, several points warrant consideration. The GMS transport corridors have been part of a larger cooperation scheme – the GMS economic corridors – namely, the East-West Economic Corridor (EWEC), the North-South Economic Corridor (NSEC) and the Southern Economic Corridor (SEC). Each of those corridors has numerous subcorridors. The economic corridors extend beyond developing transport infrastructure per se and focus upon realising the overall economic potential of the GMS selected areas. The GMS countries develop numerous Special Economic Zones and Industrial Zones that are located within the GMS economic corridors. As for the GMS transport and logistics infrastructure per se, the overall picture is ambiguous. While some infrastructure objects, mostly roads that connect big cities, and trans-border checkpoints, are in a relatively good condition, others are still rudimentary. Nevertheless, many GMS economic corridor areas, although located far from big cities and industrial centers, are rich in natural resources and maintain close people-to-people ties, which facilitates movements of production factors. Importantly, the GMS economic corridors are part of a prospective single ASEAN tourism market and hubs of tourism-related sectors, while the NSEC can be regarded as a transport and logistics foundation of China's policy on the Indochina Peninsula. Overall, according to the Asia Development Bank, investment opportunities, including those related to transport and logistics, are favorable in the GMS economic corridors.

E-commerce is part of the GMS Summits agenda. In December 2014, at the 5th GMS summit, China proposed to initiate e-commerce cooperation between the GMS states. The next year, the Framework on GMS Cross-border E-commerce Cooperation Platform was endorsed. Specifically, the following areas were distinguished as pivotal: cooperation between enterprises, facilitation of cross-border e-commerce customs procedures, investment in cross-border e-commerce infrastructure, e-commerce supporting services system, and capacity building on e-commerce. Since then, the PRC’s Lancang-Mekong Sub-regional Economic and Trade Development Center has seized the initiative in developing practical lines of cooperation and providing them with analytical support[18].

This factor has been behind the activity undertaken by Chinese e-commerce platforms in developing their logistics fleets. Specifically, JD.com invested in the Vietnamese platform Tiki.vn with a focus, among other things, on TikiNow delivery service[19]. More specifically, in cooperation with Thailand’s government, Alibaba launched a distribution hub, as part of Thailand’s first digital free trade hub, in the Eastern Economic Corridor[20]. Finally, Tencent and the ride-hailing Grab agreed upon providing Chinese WeChat/Weixin users with services in 480 cities in Southeast Asia[21], part of which is the GMS. This strategy bears fruit: according a report prepared by McKinsey, in 2021 approximately 80% of e-commerce gross merchandize value was imported outside Southeast Asia, with China as a lion’s share[22].

This activity is synergized with Beijing’s BRI-related vision. For instance, Alibaba’s Smart Digital Hub is part of Alibaba’s Electronic World Trade Platform (eWTP) in which Southeast Asia occupies a prominent place. Plus to that, Southeast Asia is a region frequently visited by Chinese tourists who prefer the digital apps they use in the PRC. Lastly, the shift in the perception across the PRC business community, namely, from “Made in China” to “Brands from China”[23] increases demand for digitally enabled logistics services.

In sum, the e-commerce transport and logistics synergy can be regarded as a commercially promising area that is integrated in both ASEAN's and China's prospective plans and enjoys support at the top level. If so, more investment in e-commerce logistics across Southeast Asia can be expected.

Conclusion

The analysis of e-commerce logistics in the Greater Mekong Subregion leads to several broad assessments. First, there is growing demand for advanced e-commerce logistics instruments to supplement well-developed e-commerce infrastructure and sophisticated retail practices. As the association completes the AEC-2025, and ASEAN member states continue their digital journey, interest across the region in upgrading e-commerce logistics services will be increasing.

Second, from an instrumental perspective, the Greater Mekong Subregion is an area where advanced e-commerce logistics practices can be successfully followed. To a considerable extent, this is predetermined by the PRC's expanding possibilities to synergize e-commerce-related and logistics-related plans with ASEAN goal-setting, relating mostly to the AEC-2025.

Lastly, the scale factor plays to China's best advantage, as the PRC was able to develop resourceful assets before the current surge of digitalization. It is exemplified by advanced practices, including those related to e-commerce logistics, substantiated by the BRI multiplier effect. Owing to this, China visibly outperforms its competitors, including in the GMS format.

In sum, the GMS case clearly demonstrates that advantages and assets that move beyond digitalization per se play a pivotal role. The GMS offers conclusive evidence of how China uses its powerful and strategically oriented instruments in order to make Southeast Asia a Sino-centric economic and commercial area.

ИНФОРМАЦИЯ ОБ АВТОРЕ

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