Electronic Commerce in Asia
- B to C Electronic Commerce -

March, 2009

Center of the International Cooperation for Computerization
CICC
Agenda

1. Outline of Survey

2. Summary of Survey Results
   - East Asia (China, Chinese Taipei, Korea)
   - Asean (Malaysia, Singapore, Thailand, Vietnam)

3. Survey Result in Each Country/region
   - China
   - Chinese Taipei
   - Korea
   - Malaysia
   - Singapore
   - Thailand
   - Vietnam

4. Summary
1. Outline of Survey

- Target Countries/region
  - East Asian Countries/Region: China, Chinese Taipei and Korea
  - Asean Countries: Malaysia, Singapore, Thailand and Vietnam

- Survey Items
  - Current Status and Issues on Electronic Commerce, especially BtoC
    - Status on IT Infrastructure, Electronic Commerce Promotion, Law/Order/Regulation, Payment, Delivery and Organizations, etc

- Survey Method
  - Web search, CICC’s networking, Face to face meeting
2. Summary of Survey Results

- **East Asia**
  - Internet is well adopted and market size of Electronic Commerce (EC) is large. IT infrastructure is also developed and business is vital.
  - **China**:
    - EC infrastructure is still continuously under development
    - Number of Internet users is the largest in the world (2008.6)
  - **Chinese Taipei**:
    - Well established EC infrastructure (Internet usage ratio is 44%)
    - Market size of EC is US$6 billion
    - Direct Business with main land China in telecommunication industry, trade industry and transportation industry is available from December, 2008
  - **Korea**:
    - Developed country in internet and EC
Survey Results in Asean Countries

- Except Singapore, Internet penetration rate is still small
- The size of EC market is also small and is going to grow
- Governments intend to promote EC for economic growth activation

✓ Malaysia: - Infrastructure is progressing by e-Government project (MSC)
  - More promotion of Internet and BtoC EC is required

✓ Singapore: - Becoming regional hub for BtoC EC in Asean region
  - Infrastructure for Internet and EC is established
  - BtoC EC market is not large because of its size of area and population

✓ Thailand: - Infrastructure for Internet and EC is established in major cities.
  - Slow Growth of Internet and BtoC EC
  - Political stability is needed for more rapid growth

✓ Vietnam: - Internet infrastructure is more expanding and BtoC EC is just started
3. Survey Result on Each Country/Region

- China
- Chinese Taipei
- Korea
- Malaysia
- Singapore
- Thailand
- Vietnam
China

- Internet Users: 253M users (As of June, 2008. User ratio is 19.1%)
- Broadband Users: 214M users (As of June, 2008. User ratio is 16.1%)
- EC settlement Methods: Cash on Delivery (80%), Bank Transfer, Credit Card, Bank/Post Office Remittance
- Major EC Sites
  - BtoB: www.alibaba.com
  - CtoC: www.taobao.com, AliPay
  - Total 100M members. taobao.com has 70% share of CtoC EC
- Delivery Services:
  - Over 30 thousand courier service companies, from small to large
  - 2,422 large-scale companies
  - Post Office EMS, Shentong Express, China Railway Express, JZS Express, etc.
  - 1-3 days in same district, 2-3 days to other province/district, others 5 days
  - Major stores have own shipping networks (Redbaby, etc.)
- EC Market Size:
  - BtoC: JPY59.8B (CNY4.3B) (2007)
  - BtoB: JPY29,539B (CNY2,123.9B) (2007)
EC Market Size in China

Changes in Chinese BtoC Market Size

Changes in Chinese BtoB Market Size

Source: iResearch Feb 2008
Policy/Legal System/Consumer Protection in China

- Policy/Legal System Concerning EC:
  - e-Signature Law (Apr. 2005)
  - Internet transactions guidance (Draft) (Mar 2007)
  - The EC development eleventh five-year-project (Jul 2007)
  - Guidance concerning acceleration of normative development of EC (Dec 2007)
  - EC Development Acceleration Policy, Shanghai (Promulgated in Nov 2008, enforced in Mar 2009)
  - Lack of law and regulation for personal information protection ⇒ Rash of Crimes
  - Lack of law and regulation for online payment

- Consumer Protection Measures:
  - Consumer Rights Protection Law (EC area is not covered enough)
  - Industry segments promote Trustmark (50 Trustmark operators)
  - Alternative dispute resolution (ADR) - includes the government judicial process, Consultation/Arbitration by Consumer Associations

- Major EC Promotion Organization:
  - China Electronic Commerce Association (CECA, Established in Jun 2000)
  - Community-Based Electronic Commerce Association (e.g., Beijing Electronic Commerce Association: Beca)
  - China Electronic Commerce Credit Research Center
E-Commerce Law Network in China  www.chinaEClaw.com

- Organization owned by Institute for Information Industry (Established in 2001, Panel of young lawyers)
- Investigation Research Institute/Panel of Experts for establishing EC/Internet-related Law
- Projects sponsored by other businesses: Ministry of Institute for Information Industry/Commercial Affairs/Science Research (Training/Publication/Investigative Research)
- Guidance on Internet Transaction (Ministry of Commercial Affairs: Issued in Mar 2007)
  - Security/Consumer Protection/Personal Information Protection, etc.
- Personal Information Protection Law (in 2010?)

Legislations/Policies/Regulations under study
- Personal Information Protection, Information Security
- Internet Payment, e-Money, Internet Transactions
- Internet Shopping
Chinese Taipei

- Internet Users: 10.1M users (As of June, 2008. User ratio is 44%)
- Broadband Users:
  - 6.8M users (As of June, 2008. User ratio is 29.8%)
- EC settlement Methods:
  - Credit Card, Cash on Delivery, Bank Transfer,
  - Convenience Store Remittance

- Delivery Services: Yamato International Logistics Co., Ltd (A Joint Venture between Yamato Logistics Co., Ltd and Uni President Enterprises Corp.)
  - Tie up with Convenient Stores
  - 1 day (Except Mountain areas)

- EC Market Size:
  - BtoC JPY546.8B (2008)
  - BtoB JPY30,720B (2008)
EC Market Size in Chinese Taipei

Changes in BtoC Market Size

Changes in BtoB Market Size

Source: Institute for Information Industry Market Intelligence Center (III/MIC) 2007

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Policy/Legal System/Consumer Protection in Chinese Taipei

- Policy/Legal System Concerning EC:
  - Ubiquitous Network Societies Development Plan (2007)
  - Private Information Protection Law (Carries in Oct 2008)
  - Consumer Protection Law (Amended twice since 1994)
  - Expanding trade with China by opening Communication, Commerce, Passage

- Consumer Protection Measures:
  - Trustmark, ADR

- Major EC Promotion Organization:
  - Secure Online Shopping Association (SOSA), Taipei Trustmark, ADR
  - Golden Web Award (Sponsored by Ministry of Economic Affairs) (BtoC Web site competition award)
Transition of IT policy in Chinese Taipei

- **Chinese Taipei : Transition of IT Policy**

  - Ubiquitous Network Societies Development Plan
  - Challenge 2008 : National Development Emphasis program (Digital Taiwan Plan, Business Operation Headquarters Plan)
  - National IT Development Draft Law
  - Knowledge Economy Development Draft Law
  - Global Operation Development
  - Annexation Challenge 2008 : National Development Emphasis program
  - National IT Merger Development Plan
  - NII Draft Law (National Information Infrastructure-building Project)

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Source: IDEAS, Institute for Information Industry; 2008

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Internet Users:  
34.82M Users (As of October, 2007. User ratio is 76.3%)  

Broadband Users:  
14.71M Users (As of October, 2007. User ratio is 30%)  

EC Settlement Methods:  
Credit Card (66.3%), Online Payment (30.1%)  
e-Money (0.7%), Others (2.9%)  

Delivery Services:  
93% is deliverable in three days  

  BtoC  JPY641.5B(W10,226B) (2007)  
  CtoC  JPY315.7B(W5,032B) (2007)  
  BtoG  JPY2,310.9B(W36,801B) (2007) (1W≒0.06)
EC Market Size in Korea

Source: Korea National Statistics Office 2008.03

Unit: 1B Won

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Policy/Legal System/Consumer Protection in Korea

Policy/Legal System Concerning EC:
- EC Basic Act
  Took effect in 1999, has amended for 3 times
- Amended Consumer Protection Law
  Took effect in 2006
- Personal Information Protection Law concerning public institutions
  Revised in 2007
  Lack of comprehensive measure for personal information protection

Consumer Protection Measures:
- Consumer Basic Act/Consumer Dispute Settlement Act
  Took effect in 1985, revised in 2008
- Trustmark/eTrust
  Practiced by KIEC (Korea Institute of Electronic Commerce) and
  3 Mass-Media companies
- ADR
  Practiced by 130 consumer groups
- ePRIVACY Mark
  Practiced by Korea Association of Information Technology (KAIT),
  Concluded MoU with Japan Information Processing Development
  Corporation (JIPDEC)
Malaysia

- **Internet Users:**
  3.73M Users (As of October, 2007. User ratio is 14.3%)

- **Broadband Users:**
  1.26M Users (As of October, 2007. User ratio is 5%)
  The ratio is going up to 13% by 2010, according to The 9th Malaysian Plan (9MP)

- **EC Settlement Methods:**
  Credit Card, Bank Transfer FPX, eMoney

- **Delivery Services:**
  2-3 days
  Delivery cost and Delivery quality remain issues
  (by PIKOM)

- **EC Market Size:**
  USD8.8B (MYR31.6B: 2005, BtoB+BtoC)
  USD20.9B (MYR75.5B: 2007, BtoB+BtoC)
  (Source: PIKOM’s Presentation Materials, Nov. 2008)
Internet/Broadband Users Ratio in Malaysia

Changes in Internet/Broadband Users Ratio

Source: PIKOM Presentation Material (Nov. 7, 2008)
Policy/Legal System/Consumer Protection in Malaysia

- Policy/Legal System Concerning EC:
  - EC Implement Measures by Multimedia Development Corporation (MDeC)
    - eBusiness Anchor Project
    - eBusiness Thrust Project
    - SME eEnablement Platform
  - Electronic Signature Law (1997)
  - Consumer Protection Law (1999)
  - E-commerce Law (2001)
  - Private Information Protection Law (Pending)

- Consumer Protection Measures:
  - No Trustmark
  - ADR
    - Practiced by National Consumer Complaint Center
      (NCCC: Established in 2004)
Singapore

- Internet Users:
  2.56M Users (As of October, 2007. User ratio is 74%)
- Broadband Users:
  2.43M Users (As of October, 2007. User ratio is 73%)
- EC Settlement Methods:
  Credit Card (77%), Cash on Delivery (16%), Debit Card/Bank Transfer (15%), eNETS/PayPal (11%)
- BtoC/CtoC Sites:
  eBay/PayPal (Asia HQ)
- Delivery Services:
  2-3 days (Singapore is almost as same size as Tokyo’s 23 wards)
- EC Market: BtoC is not common (See the chart below for the reason)

<table>
<thead>
<tr>
<th>No Interests</th>
<th>Prefer Real shopping</th>
<th>Trustworthiness</th>
<th>Security</th>
<th>Privacy</th>
<th>Others</th>
<th>lack of settlement system</th>
<th>lack of knowledge and skill</th>
<th>Poor settlement system</th>
<th>Poor internet speed</th>
</tr>
</thead>
<tbody>
<tr>
<td>39%</td>
<td>24%</td>
<td>10%</td>
<td>10%</td>
<td>5%</td>
<td>4%</td>
<td>3%</td>
<td>3%</td>
<td>1%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Notes: Over 15 years Internet users who have not used internet shopping in recent one year
Source: IDA Annual Survey on Inforcomm Usage in Households
### EC Usage Ratio of Purchasing Goods and Services by age (2007)

<table>
<thead>
<tr>
<th>Goods</th>
<th>15-24yrs</th>
<th>24-35yrs</th>
<th>35-49yrs</th>
<th>50-59yrs</th>
<th>60yrs Up</th>
<th>All Ages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entertainment Tickets</td>
<td>31%</td>
<td>46%</td>
<td>35%</td>
<td>34%</td>
<td>25%</td>
<td>37%</td>
</tr>
<tr>
<td>Traveling Goods</td>
<td>14%</td>
<td>29%</td>
<td>39%</td>
<td>40%</td>
<td>74%</td>
<td>31%</td>
</tr>
<tr>
<td>Apparel, Sporting Goods, Accessories</td>
<td>45%</td>
<td>36%</td>
<td>18%</td>
<td>12%</td>
<td>12%</td>
<td>29%</td>
</tr>
<tr>
<td>Other Goods</td>
<td>9%</td>
<td>16%</td>
<td>16%</td>
<td>18%</td>
<td>42%</td>
<td>15%</td>
</tr>
<tr>
<td>Entertainment</td>
<td>15%</td>
<td>19%</td>
<td>11%</td>
<td>13%</td>
<td>8%</td>
<td>15%</td>
</tr>
<tr>
<td>Computer H/W</td>
<td>14%</td>
<td>12%</td>
<td>8%</td>
<td>16%</td>
<td>6%</td>
<td>12%</td>
</tr>
<tr>
<td>Computer S/W</td>
<td>4%</td>
<td>13%</td>
<td>14%</td>
<td>6%</td>
<td>17%</td>
<td>10%</td>
</tr>
<tr>
<td>Application for Sport Facilities</td>
<td>9%</td>
<td>12%</td>
<td>7%</td>
<td>7%</td>
<td>0%</td>
<td>9%</td>
</tr>
<tr>
<td>Food</td>
<td>9%</td>
<td>8%</td>
<td>8%</td>
<td>10%</td>
<td>0%</td>
<td>8%</td>
</tr>
<tr>
<td>ICT Services</td>
<td>11%</td>
<td>8%</td>
<td>7%</td>
<td>9%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Securities/Bonds</td>
<td>3%</td>
<td>8%</td>
<td>9%</td>
<td>9%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Groceries</td>
<td>1%</td>
<td>5%</td>
<td>5%</td>
<td>6%</td>
<td>0%</td>
<td>4%</td>
</tr>
<tr>
<td>Photographic/Photochemical Goods</td>
<td>3%</td>
<td>5%</td>
<td>2%</td>
<td>1%</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>Insurance</td>
<td>0%</td>
<td>4%</td>
<td>4%</td>
<td>0%</td>
<td>0%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: IDA Annual Survey on Infocomm Usage in Households for 2007
Policy/Legal System/Consumer Protection in Singapore

- **Policy/Legal System Concerning EC:**
  - E-commerce Law (1998: Pending)
  - Rack of comprehensive measure for personal information protection

- **Consumer Protection Measures:**
  - Trustmark
    - Practiced by CNSG (CommerceNet Singapore) and CASE based on TrustSG Code by IDA
  - ADR
    - Practiced by CASE and CNSG
Thailand

- Internet Users: 13.5M Users (As of June, 2007. User ratio is 20%)
- Broadband Users: 940,000 Users (As of June, 2007. User ratio is 1.5%)
- EC Settlement Methods:
  - Bank Transfer (62.1%), Cash on Delivery (38.9%)
  - Bank e-Transfer (8.7%), Credit Card (7.3%)
- EC Market (2007):
  - BtoC JPY126.3B (THB47,501M) 15.6%
  - BtoB JPY212B (THB79,726M) 26.1%
  - BtoG JPY473.1B (THB177,932M) 58.3%
- Delivery Services:
  - 1 day (20.3%)
  - 2-3 days (44.2%)
  - 4 days or more (35.5%)
  - Private Delivery (28%), Outsourcing (30.5%), Combination (41.5%)
- Issues: Cost (58.6%), Delay (41.2%), Accuracy of Delivery (28.6%), Guarantee of Delivery (25.1%)
Internet/Broadband Users Ratio in Thailand

**Number and Ratio of Internet Users**

- Internet Users: **1.1**, **2.4**, **3.7**, **5.6**, **7.2**, **10.1**, **11.9**, **14.0**, **15.3**, **16.9**, **20**
- Ratio: **0.7**, **1.5**, **2.3**, **3.5**, **4.8**, **6.0**, **7.0**, **10.0**, **11.0**, **13.0**, **15.3**, **20**

Source: Asia Information Report 2008 (CICC)

Note: Estimated date for 2008 and beyond

Source: Frost & Sullivan Asia Pacific Thailand Market Insights (2008年3月)
Policy/Legal System/Consumer Protection in Thailand

- Policy/Legal System Concerning EC:
  - E-commerce Law (Took effect in 2002)
  - Consumer Protection Law (1979)
  - Consumer Protection System (Trustmark/ADR: Pending)
  - Arbitration Act (2002)

- Consumer Protection Measures:
  - Trustmark:
    Ministry of Commerce (MOC) Department of Business Development (DBD)

- EC Implementation Organization:
  - Thai eCommerce Association (TECA)
Vietnam

- **Internet Users:**
  20.57M Users (As of October, 2008. User ratio is 24.09%)
  40% of whole nation are supposed to have internet access by 2010

- **Broadband Users:**
  5.241M Users (As of 2007. User ratio is 6.2%)

- **EC Settlement Methods:**
  Prepaid Card (52.2%), Post Office Remittance (24.1%)
  Credit Card (11.8%), EAB Multifunctional Card (7.3%)
  Bank Transfer (4.2%)

- **BtoC Sites:**
  BtoC: 123mua.com, 25h.vn
  Online Payment Services:
  PayNet, an American firm, has entered in the market
  PayPal cooperating with eBay provides services from Singapore

- **Delivery Services:**
  Some companies (Vietnam Post, TNT, etc.) operates home-delivery services. Addresses have not yet registered in some parts of Vietnam, especially in the provinces. Shipping networks are limited
  3 days (only urban fringes are)
## Internet Users in Vietnam

### Number of Internet Users in Vietnam, Changes in the User Ratio (2003Y～2008Y)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3,098</td>
<td>6,345</td>
<td>10,711</td>
<td>14,684</td>
<td>18,551</td>
<td>20,573</td>
</tr>
</tbody>
</table>

| %    | 3.80% | 7.69% | 12.90%| 17.67%| 22.04%| 24.09%   |

Source: Vietnam ICT Outlook 2008
### Sales in Vietnamese BtoC Market (www.25h.vn)

<table>
<thead>
<tr>
<th>Products</th>
<th>Sales amount (Million dong)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1Q, 2007</strong></td>
<td></td>
</tr>
<tr>
<td>Fashion, Jewels</td>
<td>45.00</td>
</tr>
<tr>
<td>Home appliance</td>
<td>70.00</td>
</tr>
<tr>
<td>Gifts</td>
<td>20.00</td>
</tr>
<tr>
<td>Others</td>
<td>30.00</td>
</tr>
<tr>
<td><strong>2Q, 2007</strong></td>
<td></td>
</tr>
<tr>
<td>Medicine, Cosmetics</td>
<td>15.00</td>
</tr>
<tr>
<td>Stationary</td>
<td>50.25</td>
</tr>
<tr>
<td>Scholl supplies</td>
<td>15.20</td>
</tr>
<tr>
<td>Others</td>
<td>56.30</td>
</tr>
<tr>
<td><strong>3Q, 2007</strong></td>
<td></td>
</tr>
<tr>
<td>Scholl supplies</td>
<td>55.00</td>
</tr>
<tr>
<td>Fashion, Jewels</td>
<td>32.00</td>
</tr>
<tr>
<td>Helmet</td>
<td>250.00</td>
</tr>
<tr>
<td>Others</td>
<td>41.50</td>
</tr>
<tr>
<td><strong>4Q, 2007</strong></td>
<td></td>
</tr>
<tr>
<td>Building materials</td>
<td>77.00</td>
</tr>
<tr>
<td>Security gear</td>
<td>15.00</td>
</tr>
<tr>
<td>Furniture</td>
<td>33.50</td>
</tr>
<tr>
<td>Electronic gear</td>
<td>27.00</td>
</tr>
<tr>
<td>Helmet</td>
<td>298.00</td>
</tr>
<tr>
<td>Others</td>
<td>39.00</td>
</tr>
<tr>
<td><strong>Annual Sales, 2007</strong></td>
<td>621.75</td>
</tr>
</tbody>
</table>

Source: Ha Noi Television Development Investment Joint Stock Company (Vietnam e-Commerce Report 2007)
On a Street Corner in Vietnam

- Infrastructure (Electric Power, Communication)
- Amendment of Traffic Regulations (Helmets Required)
- Pollution (Gas Emissions)
EC Market Size:
Vietnamese EC market size (GtoB/BtoB/BtoC/CtoC) in 2007 is USD7B～10B: by Ministry of Industry and Trade (MOIT), Dec 2008

Policy/Legal System Concerning EC:
- E-commerce Development Plan (2006-2010)
- E-commerce Law (Took effect in Mar 2006)
- E-commerce Law Detailed Regulations on Electric Signature/certification (Feb 2007)
- Computer Crime Act (Pending)
- Private Information Protection Law (Pending)

Consumer Protection Measures:
- Trustmark (TrustVN) Practiced by EC Development Center (EcomViet) owned by MOIT Vietnam
  E-comViet is promoting international cooperation as a member of ATA (Asia-Pacific Trustmark Alliance) and APEC
- Organizations related to Private Information Protection Law
  VECITA and VCAD (Vietnam Competition Administration Dept.) formulate related laws cooperating with other departments of MOIT

EC Implementation Organization:
- Vietnam E-commerce Association (VECOM):
  Established in Oct. 2007, contributed to development of EC
- Danish International Development Assistance (DANIDA):
  Supporting BtoB Promotion Program in Vietnam
## Summary

<table>
<thead>
<tr>
<th>Country/Region</th>
<th>Market Size</th>
<th>Infrastructu re</th>
<th>Settlement• Logistics</th>
<th>Major Promotion organizations</th>
<th>Legal System</th>
</tr>
</thead>
</table>
| China          | 1,311.8M people $2,000 /person  
BtoC JPY59.8B (2007)  
BtoB JPY29,539.8B (2007) | 253M people (19.1%)  
214M people (16.1%) | •Cash on Delivery (80%), Bank Transfer, Credit Card, Bank/Post Office Remittance  
•1-3 days in same district, 2-3 days to other province/district, others 5 days | China Electronic Commerce Association (CECA)  
•China Electronic Commerce Credit Research Center  
•Industry segments promote Trustmark  
•ADR includes the government judicial process, Consultation /Arbitration by Consumer Associations | •The 11th five-year-project concerning development of EC  
•Guidance concerning acceleration of normative development of EC  
•EC Development Acceleration Policy, Shanghai  
•Lack of Private Information Protection Measures |
| Chinese Taipei | 23.0M people $17,250 /person  
BtoC JPY546.8B (2008)  
BtoB JPY30,720B | 10.14M people (44%)  
6.85M people (27.6%) | •Credit Card, Cash on Delivery, Bank Transfer, Convenience Store Remittance  
•Yamato International Logistics Co., Ltd (A Joint Venture between Yamato Logistics Co., Ltd and Uni President Enterprises Corp.)  
•Tie up with Convenient Stores  
•1 day (Except Mountain areas) | Secure Online Shopping Association (SOSA)  
Golden Web Award (Sponsored by Ministry of Economic Affairs) | Ubiquitous Network Societies Development Plan  
Private Information Protection Law  
Consumer Protection Law  
Expanding trade with China by opening Communication, Commerce, Passage |
| Korea          | 48.4M people $17,690 /person  
JPY 32,369B (2007)  
BtoC JPY640.9B | 34.82M people (76.3%)  
14.71M people (30%) | •Credit Card (66.3%), Online Payment (30.1%), e-Money (0.7%) | Korea Institute for EC (KIEC)  
Korea Association of Information Technology (KAIT)  
eTrust accreditation association  
Korea Consumer Agency (KCA) | EC Basic Act  
Amended Consumer Protection Law  
Personal Information Protection Law concerning public institutions  
Rack of comprehensive measure for personal information protection |
| Malaysia       | 26.1M people $5,620 /person  
JPY1,987.6B (2007年)  
BtoB+BtoC | 15M people (14.3%)  
1.26M people (5%) | •Credit Card, Bank Transfer FPX, eMoney  
•2-3 days  
•Delivery cost and Delivery quality remain issues | Multimedia Development Corporation (MDeC)  
National Consumer Complaint Center (NCCC)  
the Association of the Computer and Multimedia Industry (PIKOM)  
National EC council (NECC)  
Malaysian Communications and Multimedia Commission (MCMC) | Computer Crime Act  
Electronic Signature Law  
Consumer Protection Law  
E-commerce Law  
Private Information Protection Law  
eBusiness Anchor  
SME eTrustablement Platform  
eBusi |
<table>
<thead>
<tr>
<th>Country・Region</th>
<th>Market Size</th>
<th>Infrastructure</th>
<th>Settlement・Logistics</th>
<th>Implement Measures for Promotion</th>
<th>Legal System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Singapore</td>
<td>4.5M people $28,730 /person 2.65M people (74%) 2.51M people (70.3%)</td>
<td>2.65M people (74%) 2.51M people (70.3%)</td>
<td>•Credit Card, Bank Transfer FPX • eMoney • 2-3 days (Singapore is almost as same size as Tokyo’s 23 wards)</td>
<td>•CASE(Consumers Association of Singapore) • CNSG (CommerceNet Singapore) • the National Trust Council (NTC) • the Infocomm Development Authority (IDA)</td>
<td>•Policy Framework of EC • E-commerce Law • Rack of comprehensive measure for personal information protection</td>
</tr>
<tr>
<td>Thailand</td>
<td>63.4M people $3,050 /person JPY811.3B BtoC JPY126.3B</td>
<td>13.50M people (20%) 940,000 people (5.2%)</td>
<td>•Bank Transfer (62.1%), Cash on Delivery (38.9%), Bank e-Transfer (8.7%), Credit Card (7.3%) • 1 day (20.3%) • 2-3 days (44.2%) • 4 days or more (35.5%)</td>
<td>•Thai eCommerce Association (TECA) • National Electronics and Computer Technology Center (NECTEC) • Ministry of Information and Communication Technology (MITC) • Electric Trade Association (ETA)</td>
<td>•E-commerce Law • Computer Crime Act • Consumer Protection Law • Consumer Protection System • Arbitration Act</td>
</tr>
<tr>
<td>Vietnam</td>
<td>84.0M people $700 /person JPY870B～951B</td>
<td>15.50M people (18.64%) 5.241M people (6.2%)</td>
<td>•Prepaid Card (52.2%), Post Office Remittance (24.1%), Credit Card (11.8%), EAB Multifunctional Card (7.3%), Bank Transfer (4.2%) • Vietnam Post・TNT • 3 days (only urban fringes are)</td>
<td>•Vietnam E-commerce Association (VECOM) • Danish International Development Assistance (DANIDA) • Ministry of Industry and Trade (MOIT) • Vietnam E-commerce and Information Technology Agency (VECITA) • EC Development Center (EcomViet)</td>
<td>•E-commerce Development Plan • E-commerce Law • E-commerce Law Detailed Regulations on Electric Signature/certification • Computer Crime Act • Private Information Protection Law</td>
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</table>
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* In visited order
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