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E-commerce and Development: An ASEAN Perspective

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9 December 2016



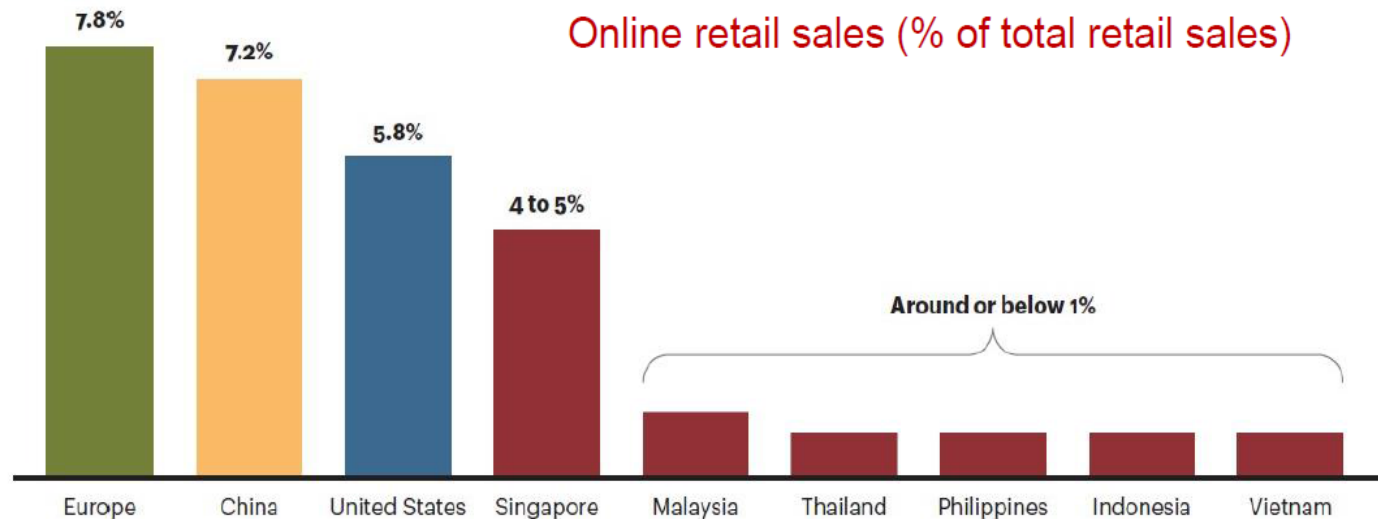
Overview

- World's third largest market with more than 600 million people.
- Directly linked with development of MSMEs.
- MSMEs account for more than 96% of all enterprises and up to 97% of employment.
- Between 2009-2014, proportion of ASEAN population using internet doubled from 12.6% to 25.8%.
- Southeast Asia's digital market will be worth 200 billion USD by 2025, up from 31 billion USD in 2015.



E-COMMERCE IN ASEAN

- Industry in its infancy



Sources: Frost & Sullivan, A.T. Kearney analysis

- ASEAN e-commerce market is expected to grow at least twice as fast as markets in other regions.

ASEAN-6 digital population 2015



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Indonesia

Population	255.5 M
Internet users	88.1 M
Social media users	79.0 M
Mobile connections	318.5 M
Mobile social users	67.0 M

Thailand

Population	65.1 M
Internet users	35.0 M
Social media users	38.0 M
Mobile connections	97.1 M
Mobile social users	34.0 M

Malaysia

Population	30.8 M
Internet users	20.6 M
Social media users	18.0 M
Mobile connections	41.9 M
Mobile social users	16.0 M

Singapore

Population	5.54 M
Internet users	4.65 M
Social media users	3.70 M
Mobile connections	8.10 M
Mobile social users	3.40 M

Philippines

Population	102.4 M
Internet users	47.1 M
Social media users	48.0 M
Mobile connections	114.6 M
Mobile social users	40.0 M

Vietnam

Population	90.7 M
Internet users	45.6 M
Social media users	36.0 M
Mobile connections	136.1 M
Mobile social users	29.0 M

Source: WeAre Social Nov 2015

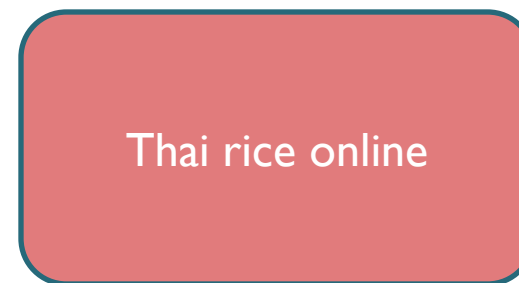
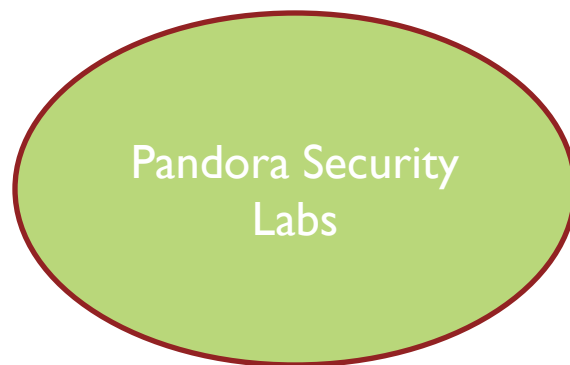
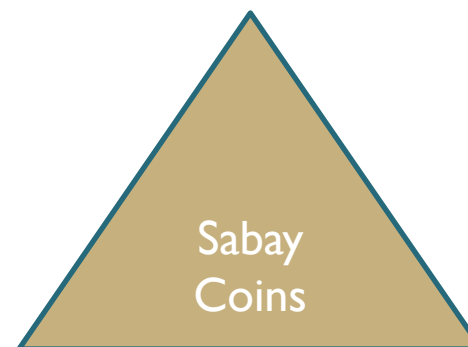


ASEAN E-commerce Initiatives

- **E-ASEAN Framework Agreement** - adopted by Leaders in 2000.
- **AEC Blueprint 2025** – to intensify cooperation on e-commerce with a view to developing an ASEAN Agreement on E-commerce to facilitate cross-border e-commerce transaction.
- **ASEAN ICT Masterplan 2020** - launched in November 2015, aims to transform ASEAN towards a digital economy by 2020.
- **ASEAN Strategic Action Plan on Consumer Protection 2025** – to develop a Common ASEAN Consumer Protection Framework which includes product liability & safety, consumer data privacy.
- **E-commerce provisions in ASEAN FTAs**
 - AANZFTA (2010) transparency & online consumer protection,
 - Negotiating an e-commerce chapter under RCEP



ASEAN's E-commerce Success Stories



Challenges

- Infrastructure – digital divide/soft and physical infrastructure
- Lack of trust and confident – no common framework for cross-border dispute resolution and cybercrime enforcement
- Gap in regulatory framework among Member States

Challenges

- Bridging the regulation gap

Table 1. Status of e-commerce law harmonization in ASEAN as of March 2013

Member Country	Electronic Transactions	Privacy	Cybercrime	Consumer Protection	Content Regulation	Domain Names
Brunei Darussalam	Enacted	None	Enacted	Partial	Enacted	Enacted
Cambodia	Draft	None	Draft	None	Draft	Enacted
Indonesia	Enacted	Partial	Enacted	Partial	Enacted	Enacted
Lao People's Democratic Republic	Enacted	None	None	Draft	Enacted	Partial
Malaysia	Enacted	Enacted	Enacted	Enacted	Enacted	Enacted
Myanmar	Enacted	None	Enacted	Enacted	Enacted	Enacted
Philippines	Enacted	Enacted	Enacted	Enacted	None	Enacted
Singapore	Enacted	Enacted	Enacted	Enacted	Enacted	Enacted
Thailand	Enacted	Partial	Enacted	Enacted	Partial	Partial
Viet Nam	Enacted	Partial	Enacted	Enacted	Enacted	Enacted

Thank you.