



Lao People's Democratic Republic Rapid eTrade Readiness Assessment



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This publication has been edited externally.

United Nations publication issued by the United Nations Conference on Trade and Development.

UNCTAD/DTL/STICT/2018/3



NOTE

Within the UNCTAD Division on Technology and Logistics, the ICT Policy Section carries out policy-oriented analytical work on the development implications of information and communication technologies (ICTs) and e-commerce. It is responsible for the preparation of the Information Economy Report (IER) as well as thematic studies on ICT for Development.

The ICT Policy Section promotes international dialogue on issues related to ICTs for development and contributes to building developing countries' capacities to measure the information economy and to design and implement relevant policies and legal frameworks. It also monitors the global state of e-commerce legislation (unctad.org/cyberlawtracker). Since 2016, the section has coordinated a new multi-stakeholders' initiative entitled eTrade for all (etradeforall.org), which aims to improve the ability of developing countries, particularly least developed countries (LDCs), to use and benefit from e-commerce.

Reference to companies and their activities should not be construed as an endorsement by UNCTAD of those companies or their activities.

The following symbols have been used in the tables:

Two dots (..) indicate that data are not available or are not separately reported. Rows in tables have been omitted in those cases where no data are available for any of the elements in the row;

A dash (-) indicates that the item is equal to zero or its value is negligible;

Reference to "dollars" (US\$) means United States of America dollars, unless otherwise indicated;

Details and percentages in tables do not necessarily add up to the totals because of rounding.



PREFACE

The eTrade for all Initiative, launched at the fourteenth Ministerial Conference of UNCTAD in July 2016, is a practical example of how to harness the digital economy in support of the 2030 Agenda for Sustainable Development, notably Sustainable Development Goals (SDGs) 5, 8, 9, and 17. The initiative seeks to raise awareness, enhance synergies, and increase the scale of existing and new efforts by the development community to strengthen the ability of developing countries to engage in and benefit from e-commerce by addressing seven relevant policy areas:

- E-commerce readiness assessment and strategy formulation
- ICT infrastructure and services
- Trade logistics and trade facilitation
- Payment solutions
- Legal and regulatory frameworks
- E-commerce skills development
- Access to financing

As part of the initiative, demand-driven assessments are envisaged to provide a basic analysis of the current e-commerce situation in the countries concerned, and to identify opportunities and barriers. The resulting reports will serve as a valuable input to these countries' involvement in various discussions related to e-commerce and digital trade, such as in the context of the new UNCTAD Intergovernmental Group of Experts on E-commerce and the Digital Economy.

It may furthermore help LDCs to identify areas in which they could benefit from assistance by partners of eTrade for all.

The Lao PDR Rapid eTrade Readiness Assessment is the seventh such assessment conducted by UNCTAD and the third for an ASEAN LDC after Cambodia (December 2016) and Myanmar (November 2017). With this report, UNCTAD has covered all three ASEAN LDCs and contribute to their effective participation in the ASEAN Work Programme on Electronic Commerce (AWPEC) 2017-2025. The AWPEC was finalized by the newly established ASEAN Coordinating Committee on Electronic Commerce (E-Commerce) and adopted by the ASEAN Economic Ministers (AEM) in late 2017. The AWPEC aims to facilitate cross-border e-commerce in ASEAN, covering multi-sectoral e-commerce initiatives in the areas of infrastructure, education and technology competency, consumer protection, modernization of the legal framework, security of electronic transactions, payment systems, trade facilitation, competition, and logistics. A key deliverable of the AWPEC is the development of an ASEAN Agreement on E-Commerce.

With the eTrade for all partners, UNCTAD is committed to continue supporting Lao PDR in its resolve to harness the potential of e-commerce for its development.

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ACKNOWLEDGEMENTS

This Rapid eTrade Readiness Assessment for Lao PDR was prepared by Sven Callebaut, UNCTAD Consultant, in close collaboration with a team comprising Cécile Barayre, Rahul Bhatnagar and Marian Pletosu, under the overall guidance of Torbjörn Fredriksson. Local support and logistics were provided by Ms. Latdaphone Vongkhamheng.

The consultant wishes to express his profound gratitude to H.E. Madam Khemanni Pholsena, Minister of Industry and Commerce, Dr. Sirisamphanh Vorachit, Director General and Phouvieng Pongsa, Deputy Director General, Department of Planning and Cooperation, Ministry of Industry and Commerce. Invaluable logistics support and access to the most important stakeholders in the Government of Lao PDR were provided by Mr. Sengpanomchone Inthasane, Ms. Sonevilay Phaengtavanh and Mr. Phoutsavong Phatsouda, Department of Planning and Cooperation, Ministry of Industry and Commerce of the Lao PDR.

In Geneva, the assessment was made possible thanks to the assistance of the Permanent Mission of the Lao PDR, in particular of Mr. Inthasane Khounekham, Commercial Counsellor.

The assessment benefited from inputs from more than 50 Laotian institutions in both public and private sectors, through the online eT-Ready surveys and subsequent interviews in Vientiane. The consultant wishes to thank all individuals who took part in the focus group discussions in the Ministry of Industry and Commerce facilities in Vientiane in November and December 2017.

Desktop publishing was prepared by Lise Fantin and the cover was designed by Nadège Hadjémian. The document was externally edited by Nancy Biersteker.

Funding for this report was provided by the Government of Sweden.



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ABBREVIATIONS

ADB	Asian Development Bank
ASEAN	Association of Southeast Asian Nations
ATM	Automatic Teller Machine
B4ETD	Business for eTrade Development
BCEL	Banque Pour Le Commerce Exterieur Lao (Lao Foreign Trade Bank)
BCoMe	BCEL Community Money Express
BFL	Banque Franco-Lao (Group BRED)
BOL	Bank of the Lao PDR
COD	Cash on Delivery
DFS	Digital Financial Services
DP	Development Partner
EIF	Enhanced Integrated Framework
FDI	Foreign Direct Investment
FSP	Financial Service Providers
GoL	Government of Lao People's Democratic Republic
ICT	Information and Communication Technology
ISP	Internet Service Providers
IT	Information Technology
ITU	International Telecommunication Union
LICA	Lao ICT Commerce Association
LNCCI	Lao National Chamber of Commerce and Industry
MM4P	Mobile Money for the Poor
MAFIPP	Making Access to Finance More Inclusive for Poor People
MoIC	Ministry of Industry and Commerce
MoF	Ministry of Finance
MoST	Ministry of Science and Technology
MPI	Ministry of Planning and Investment
MPT	Ministry of Posts and Telecommunications
MPWT	Ministry of Public Works and Transport Ministry of Transportation and Communications
MSME	Micro, Small and Medium Enterprises
NIU	National Implementation Unit
NSEDP	National Socio-economic Development Plan
POS	Point of Sale
PPP	Public-Private Partnership
PSP	Payment Service Provider
RCEP	Regional Comprehensive Economic Partnership
SHIFT	Shaping Inclusive Finance Transformations
SME	Small and Medium Enterprises
TFA	Trade Facilitation Agreement
UNCTAD	United Nations Conference on Trade and Development
UNCDF	United Nations Capital Development Fund
UPU	Universal Postal Union
US\$	United States Dollar
WTO	World Trade Organization



EXECUTIVE SUMMARY

Lao PDR is actively working to graduate from the list of Least Developed Countries. The Lao PDR economy continues to perform well: in the last six or seven years, there certainly has been a noticeable shift in its economic outlook. In its quest to diversify its economy and trade Lao, now a member of the WTO, has turned to services as an engine of economic development. Services matter both because they make a significant contribution to export diversification and growth and because they play the role of an enabler of other sectors of the economy in moving up the value chain and contribute to the economic diversification process.

Information and communications technology (ICT) services are slowly becoming an important segment of the Lao economy, triggered by Lao's participation in international negotiating fora, because of its geographical position in the Association of Southeast Asian Nations (ASEAN) and the need to catch up with the development of digital economies at its borders. Despite this, the adoption of e-commerce both by firms and consumers has been limited, raising questions about the importance of persistent bottlenecks.

The concept of e-commerce is still new for Lao. For most respondents to the survey, e-commerce is about buying retail products, notably clothes, IT products and cosmetics online. The improvement of logistics and payment infrastructure has contributed to the recent growth of e-commerce, as many young people have started buying products online. Significant progress has also been made on trade facilitation, although more efforts are needed towards paperless trade. While interest has grown, e-commerce is not

perceived by operators (both government and privately-owned) as key impediments to the continued development of the Lao telecommunications sector. Besides the significant growth of mobile connectivity in recent years, the Internet service needs to be strengthened to help people use digital financial services (DFS). In a country where more than 80 per cent of the population own a mobile phone and only 40 per cent are financially included although not banked, DFS hold significant potential to provide accessible and convenient services to Lao people. However, low literacy and limited understanding of technology represent major challenges to penetration and adoption of DFS in rural areas.

The Lao government passed a law on electronic transactions in 2012, paving the way for future growth in e-commerce. It has also enacted the Law on Prevention and Combating of Cyber Crime in 2016. A new law creating a National Payment System should be passed in 2018, providing much needed DFS regulations. The regulatory framework needed to enable interbank payments is being developed. Lao PDR still doesn't have a full set of laws to regulate e-commerce activities, the main missing legislation being on privacy and the protection of consumers online. The Government has been concerned about what have appeared to be potential revenue losses created by the absence of dedicated regulations for e-commerce activities (in particular from so-called Facebook and Instagram shops).

Needs for technical assistance are well perceived and were expressed at different occasions during interviews conducted for this assessment. Some of

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