

China's E-commerce Environment

中国的电子商务环境



While e-commerce is not a new concept in China, a keen understanding of how it works in the China market can really give firms an edge over their competition.

by **Maurice Blanchard**

The quick development of the Internet infrastructure in China presents many new business opportunities for foreign companies, but chief among them is e-commerce. Due to its size and substantial growth, China has the potential to become the largest market for almost everything, and e-commerce is no exception. Estimations from the Boston Consulting Group show that China will have around 380 million online shoppers by 2016 (“Chinese Shoppers Use Multiple Channels”, April 2014).

Naturally, e-commerce is most well-developed in China's first tier cities - Shanghai, Beijing, Guangzhou, and Shenzhen - but the gap between usage in these metropolitan areas and smaller cities is narrowing. Millions of Chinese people can log onto the Internet and buy a wide range of products today. These products include clothing, electronics, books, and food, but as development continues, there seems to be no bounds as to what people will electronically purchase in the future.

As a consequence of the rapid technological development within China, the key success factors for e-commerce are also constantly changing. Therefore,

电子商务在中国已经不是什么新鲜事物，因此对它在中国市场运作方式的透彻了解将为企业带来实际的竞争优势。

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中 中国互联网设施的快速发展为外资企业带来了许多全新的商机，其中最重要的就是电子商务。中国经济规模之大、增速之快使其有潜力成为几乎任何商品的最大市场，电子商务也不例外。据波士顿咨询集团估计，中国的网络购物消费者将在2016年达到约3.8亿（“中国消费者通过多种渠道购物”，2014年4月）。

中国的一线城市——上海、北京、广州和深圳——理所当然的是电子商务最为发达的地区，但这些大都市对电子商务的使用与其他城市间的差距正在缩小。如今，上百万中国人可以通过登录互联网购买各种商品。这些商品包括服装、电子产品、图书和食品，但随着电子商务的进一步发展，未来人们在网络上购买的商品将无限于种类。

companies are forced to develop and to change their strategies constantly. Success factors within the e-commerce industry are highly linked to the technological and logistical development within the country.

A primary demand-driver for e-commerce in China is consumers looking to purchase products that they cannot locate in physical stores. They may be looking for these products at discounted prices, but the trend has been that they are increasingly using e-commerce to find unique goods or brands they love. Many consumers, especially amongst the younger age groups, have their first contact with a brand over the Internet.

The Chinese Internet

Swiss companies that are interested to enter the e-commerce market in China should consider that China is known for its strict control of the Internet. According to the company Great Fire, which provides statistics about blocked websites in China, 150 of the top 1000 domains are blocked within Mainland China. Pages like Facebook, Twitter, and YouTube, as well as Google services are not accessible on any IP address coming from the Mainland. This makes it more difficult for Chinese citizens to access websites or shops that are hosted outside of China. Therefore the question arises of how to effectively reach Chinese customers via the Internet. Companies have different alternatives with regard to entering the Chinese online environment, but some of them are more effective than others.

A Swiss company that wants to register a Chinese top-level domain (.cn) needs to apply for the Internet Content Provider (ICP) licence. An ICP licence is also required for any foreign company that wants to operate a stand-alone website, including e-commerce services, with a web-server based in Mainland China. Furthermore, if a website is hosted in China, the domain name also needs to be registered in China. However, it is only possible to apply for an ICP licence and to register for a domain name if the company is physically present on the mainland. Additionally, it is very important to provide appropriate payment methods to Chinese customers, as most of the popular payment methods differ from the ones that are used on Western websites or marketplaces. The most common payment solution is Alipay, which is operated by the Alibaba Group, though Internet banking payments and third-party payments are also used.

Social media and search engines

Market entry barriers for e-commerce in China are rather low. Therefore, the competition within the Chinese e-commerce market is high. In order to promote its products in this fast growing market, an effective use of Chinese social media can be critical in establishing a successful e-commerce operation.

Over 40 per cent of Chinese online shoppers have seen a product on social media before buying it.

Another possibility for promoting products on the Chinese Internet is via local search engines. The interaction between search engines and e-commerce is different in China than in the rest of the world. Outside of China, most people

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中国快速的技术发展带来的结果就是致胜于电子商务领域的关键因素是不断变化的，因此，企业也必须不断发展和改变其战略。致胜于电子商务领域的因素与国内的技术和物流发展高度相关。

中国对电子商务需求的首要推动因素是消费者寻求购买在实体商店买不到的商品，他们寻找的可能是折扣商品，但趋势是他们更多的利用电子商务来寻找喜爱的独特商品或品牌。许多消费者——尤其是年轻消费者——与品牌的首次接触都是在互联网上进行的。

中国的互联网

有兴趣进入中国电子商务领域的瑞士企业应注意的一点是中国对互联网有着十分严格的管控。根据 Great Fire 公司提供的在中国被拦截的网站统计数据显示，前 1000 大域名中有 150 个在中国内地被拦截。像脸谱 (Facebook)、推特 (Twitter)、YouTube 以及谷歌的服务在中国内地的 IP 地址下都不可访问，也就是说中国公民很难访问在海外注册的网站或商店。那么问题来了，如何通过互联网接触到中国的消费者呢？在进军中国互联网的过程中企业有不同的选择，但其中一些选择比其他选择更为有效。

希望注册中国顶级域名 (.cn) 的瑞士企业需要申请互联网内容提供商 (ICP) 牌照，希望在中国运营包括电子商务服务在内的独立网站的外资企业也必须申请 ICP 牌照，并在中国内地设置网络服务器。此外，如果网站在中国运营，那么其域名也必须在中国注册。不过，只有在中国内地有实体存在的企业才能申请 ICP 牌照和注册域名。除此以外，为中国消费者提供恰当的支付方式也十分重要，因为中国常见的支付方式大多与西方网站或市场不同。最为常见支付工具是由阿里巴巴集团运营的支付宝，其他支付方式还包括网上银行支付和第三方支付等。

社会传媒和搜索引擎

中国的电子商务市场准入门槛很低，因此，中国电子商务市场的竞争也就十分激烈。要想在这一快速增长的市场推广产品，有效的利用中国社会传媒是建立成功的电子商务运营的关键。40% 以上的中国网络购物消费者在购买某种商品前都已在社会传媒上看到过该商品。

另一种在中国互联网上推广产品的方法是通过本土搜索引擎。中国的搜索引擎与电子商务间的互动和联系与世界其他国家和地区不同。在其他国家，多数人购物是从在谷歌上搜索开始的。而在中国，百度是最重要的搜索引擎，但由于企业间的激烈竞争，百度拦截来自最大的电子商务平台天猫和淘宝的搜索结果。鉴于此，中国消费者一般会直接登录电子商务平台进行购物，而非通过国

start their shopping intentions with a search on Google. In China, Baidu is the primary search engine. But Baidu blocks results from the biggest marketplaces Tmall and Taobao, due to the fierce competition between the companies. Because of this, many Chinese shoppers start their searches directly on marketplaces instead of on the country's largest information search engine. Hence, promotions on marketplaces can be considered as more efficient.

Online sales standards

For Swiss companies, selling online can be a good way to enter the Chinese market, as it is the easiest way to enter. Some marketplaces provide a relatively low-cost method of selling products to a large customer base. This also has the advantage of circumventing the need for an ICP licence and domain-name registration in order to do business in China.

Once the online business has been set up, the company needs to be aware of the logistical and regulatory situation. The entry of all goods, including parcels shipped to China individually, are dutiable according to the stipulations of "Dutiable Value of Entry Goods" of the People's Republic of China. In China, it is usual that goods bought online are delivered within two to three days. This is the reason why many companies have their own warehouses in the country. Standard return policies have had to be revised in the e-commerce world in an effort to protect consumer rights in China. Due to consumer demands, sellers are required to issue an invoice for all transactions. If there are any complaints, the customer is able to use the provided e-shopping receipt to prove the transaction occurred. Furthermore, the consumer is now allowed to return the goods within seven days and without any particular reason. Product warranty applies if a product malfunctions within seven days after purchase: a customer may request a refund, replacement or repair. Depending on the product, the warranty is guaranteed for a period of three months to two years.

Recommendations for Swiss SMEs

Entry into China can differ greatly depending on how a company wants to be present in the market. All companies should consider a range of options from the different alternatives that exist for market entry before selecting the one that is best for their strategy. Due to the language barrier and cultural differences, marketing strategies should be adapted for the Chinese market so that Chinese customers can be targeted in an effective way. Product and service descriptions should always be translated into Chinese, and if possible a website hosted within Mainland China should be provided, in order to target the right Chinese customer. Companies also need to offer mobile shopping possibilities.

Alibaba is the clear leader in the Chinese e-commerce market. Many famous brands and big companies have recognised this fact, and are now selling their products via Taobao or Tmall. Another factor is that companies using these platforms can heavily benefit from the existing traffic on Alibaba's marketplaces. The three platforms - Alibaba, Taobao and Tmall - had 795 million estimated visits in December 2014. Alibaba's marketplaces are constructed in such a way that customers feel trust because product ratings are provided. Broad customer care and online payment solutions are also offered, which significantly increase customer trust in Alibaba's solutions. ○

内最大的信息搜索引擎。因此，在电子商务平台上推广也是十分有效的做法。

网络销售标准

对于瑞士企业来说，网络销售是进入中国市场的良策，因为它是最容易的途径。一些电子商务平台也提供以相对较低的成本将商品销售给较大的客户群体的方案，这也有助于希望在中国经营的企业绕过 ICP 牌照申请和域名注册。

一旦设立了线上业务，企业就需要了解物流情况和相关规范信息。按照中华人民共和国“进境物品完税价格表”的规定，包括运往中国的单个包裹在内的所有商品都应缴税。在中国，在网上购买的商品一般会在两天到三天内完成配送，这也是许多公司在中国内地设有仓库的原因。

为了保护中国消费者的权益，电子商务领域的标准退货政策仍有待修订。卖家必须依照消费者的要求对所有交易出具发票，如果发生任何纠纷，消费者可以利用该电子购物发票作为交易发生的证明。此外，消费者还可享受七日内无理由退换货的权利。如果消费者购买某商品七日内发生损坏，消费者可以申请退款、换货或维修。保修期因商品而异，从三个月到两年不等。

给瑞士中小企业的建议

根据企业希望在中国的存在方式不同，进入中国市场的方法也十分不同。所有企业都应该从现有的市场进入的不同选项中考虑一系列的选择，并从中选出适应企业战略的最优方案。由于语言障碍和文化差异，企业应对市场战略进行调整以适应中国市场，更有效的针对中国消费者。企业应把产品和服务描述翻译成中文，如果可能的话应在中国内地运营网站，以便针对正确的中国消费者群体。企业还应提供移动端购物的选择。

阿里巴巴是中国电子商务市场的领军者，许多知名品牌和大型企业都认识到了这一点，并通过淘宝或天猫平台销售产品。另一方面，使用这些平台的企业还可以极大的受益于阿里巴巴的这些平台上的现有客流量。截止 2014 年 12 月，阿里巴巴、淘宝和天猫这三大平台的访问量约为 7.95 亿。阿里巴巴的平台构建方式之所以令消费者信任是因为消费者可以对商品进行评级，此外，它还提供广泛的消费者关注和线上支付方案，这也大大提高了人们对阿里巴巴平台的信赖。

About the author

Maurice Blanchard is a Project & Marketing Manager at CBC Switzerland Ltd in Berne. CBC Switzerland Ltd is a Swiss-Chinese Company with strong practices in the field of Marketing Research, Business Consulting, Executive Search and Marketing & Communication services in the region of Asia.

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