

GUILIN TOURISM UNIVERSITY · 桂林旅游学院

CHAPTER 1

Ecommerce and Cross-border Ecommerce

电商与跨境电商

A bilingual lecture series for international students · 面向留学生的双语课程 (6 sessions)

2026—2027 学年第一学期

Course · 跨境电商概论 Cross-border Ecommerce

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“The “e” in ecommerce has been an overwhelming success around the world.”

教材开篇语：把商务电子化，是过去三十年最成功的一次技术改造。

S1 什么算电商**What counts as ecommerce?**

Definition; narrow, broad and pan-ecommerce

定义与三种口径；口径决定数字能不能比

90 min · lecture + task

S2 什么使交易成为跨境**What makes a transaction cross-border?**

Three elements; actors; platform vs seller

三个构成要素；参与主体；平台与卖家的区别

90 min · lecture + task

S3 生态系统与传统商务对照**Ecosystem and the traditional comparison**

Figure 1-3; supporting services; §1.3

生态系统各层；支撑服务；与传统商务的比较

90 min · lecture + task

S4 行业如何走到今天**How the industry got here**

1994; three stages; four trends (§1.4–1.5)

首笔在线交易；三个阶段；四大趋势

90 min · lecture + task

S5 到底有多大**How big is it, really?**

Scale vs penetration; Table 2-1; data gaps

规模与渗透率；表 2-1；数据缺口

90 min · lecture + task

S6 优势、挑战与综合**Advantages, challenges, synthesis**

§1.6–1.8; cost and risk; workshop

优势与挑战；成本与风险；综合工作坊

90 min · lecture + task

Every session ends with a task you produce in class — the six tasks build one assessment portfolio.

每节课都有一项课堂产出，六次产出一份完整的过程性评价材料。

- 01** Use one purchase to say what makes a transaction ecommerce, and what makes it cross-border.
用一次具体购买说明：什么算电商、什么使交易成为跨境。
- 02** Separate narrow, broad and pan-ecommerce, and name the question each scope answers.
区分狭义、广义与大电商，并说出每种口径回答什么问题。
- 03** Test any case against the three elements: different customs territory, online settlement, cross-border delivery.
用三个要素检验任意案例：不同关境、在线成交结算、跨境交付。
- 04** Draw one order as actors plus services, and locate the failing link instead of saying “logistics is bad”.
把一笔订单画成主体与服务的链条，定位失败环节，而不是笼统说“物流不好”。
- 05** Compare economies on scale and on penetration, and refuse to compare numbers with different scopes.
从规模与渗透率两个维度比较经济体，并拒绝比较口径不同的数字。
- 06** State five advantages and seven challenges of cross-border ecommerce, and say who bears each.
说出跨境电商的五项优势与七项挑战，并说明各自由谁承担。

HOW EACH 90 MINUTES RUNS

15 min
Open with the case
案例开场，先给问题

35 min
Concept, then counter-example
讲概念，紧接着给反例

30 min
You apply it in pairs
两人一组动手做

10 min
Wrap: three sentences
收束：三句话总结

TEACHING CASE · FICTIONAL

One phone case, one chain

一只手机壳，一条链条

SELLER A Shenzhen seller lists the case on a platform
深圳卖家在平台上架

BUYER A Nairobi student orders and pays by card
内罗毕学生手机下单、刷卡支付

PRICE US\$12.9 on the listing
页面标价 12.9 美元

DELIVERY Arrives in 21 days; duty paid at the door
21 天后到货，收货时缴税

No real seller, order or prices are used.

WHAT WE DO WITH IT IN EACH SESSION

S1 Which word is doing the work — “shopping”, “import” or “cross-border”?
三个词中哪一个在起作用

S2 Test it against the three elements; separate platform, seller, services
三要素检验；区分平台、卖家与服务

S3 Locate every step and every cost line; find the failing box
定位每一步与每一笔成本

S4 Which stage of the industry makes this order possible?
这笔订单依赖哪个发展阶段

S5 Can this order be counted in the statistics, and in which scope?
这笔订单能否进统计、进哪个口径

S6 Who bears the seven challenges in this order, and how much?
七项挑战由谁承担、代价多大

Keep your notes on this one order: by Session 6 you will have a complete analysis of it.

请围绕这一笔订单持续记录，到第六次课你手上会有一份完整分析。

01

SESSION 01 OF 6

Definition, and the three scopes of ecommerce

90 minutes

讲授 + 课堂任务 + 收束

Chapter 1

What counts as ecommerce?

什么算电商

IN THIS SESSION · 本节目标

- 1** Explain, using one real purchase, what makes a transaction ecommerce.
用一次具体购买说明什么样的交易算电商。
- 2** Distinguish narrow, broad and pan-ecommerce, and the question each scope answers.
区分狭义、广义与大电商，并说出各自回答的问题。
- 3** Tell ecommerce from e-business and from digital commerce.
辨析电商、电商企业与数字商务。
- 4** Use scope as a question, not as a label.
把口径当作提问工具，而不是标签。

15 min
Warm-up
案例开场

35 min
Concept
概念讲解

30 min
Task
课堂任务

10 min
Wrap
收束

THE FACTS

A student in Nairobi orders a phone case from a Shenzhen seller. US\$12.9, delivered in 21 days, duty paid at the door.

内罗毕的一名学生向深圳卖家订购一只手机壳：售价 12.9 美元，三周后到货，收货时缴税。

THE BUYER

“It is just online shopping.”

“这就是网购。”

HER COUSIN, WHO RUNS A SHOP

“这是进口，不是网购。”

“That is an import, not shopping.”

HER TEACHER

“这叫跨境电商。”

“This is cross-border ecommerce.”

THE QUESTION FOR TODAY

Are the three of them talking about the same event?

If they are, which word is actually doing the work — and which word is only a habit of speech?

三个人说的是同一件事吗？如果是，哪个词才真正起作用？

Answer it twice: once before the lecture, once at the end of it.

A definition is not a dictionary entry here — it is the tool that decides what gets counted, taxed and regulated.

在本课程里，定义不是词典条目，而是决定“什么被统计、被征税、被监管”的工具。

DEFINITION

Commerce conducted electronically via the Internet: the buying and selling of goods or services, and the transfer of money or data.

通过互联网以电子方式完成的商务活动：买卖商品或服务，并转移资金或数据。

The object is not the test. The electronic completion is.

Goods

实物

A phone case, a book, a machine tool

手机壳、书、机床

Services

服务

One night in a hotel, a flight, a course

一晚酒店、机票、课程

Money

资金

A card payment, a wallet top-up, an invoice

paid online
刷卡支付、钱包充值、在线付账单**Data**

数据

A subscription feed, an API call, a licence

key
订阅信息流、接口调用、授权码

Ecommerce is not e-marketing: an advertisement is not a transaction. Placing an ad is marketing; completing the exchange electronically is ecommerce.

电商不等于网络营销：投放广告是营销，通过电子方式完成交易才是电商。

SO WHAT CHANGES WHEN THE TRANSACTION MOVES ONLINE?

- Reach stops being local — a seller meets buyers it could never meet in a shop.
覆盖范围不再受地理限制，卖家能接触到实体店触达不到的买家。
- Each step leaves a record — order, payment, handover, declaration.
每一步都留下记录：订单、支付、交接、申报。
- A new set of actors appears between seller and buyer.
买卖双方之间出现了一组新的主体。

- The unit of analysis becomes the order, not the shop.
分析单位从“店铺”变成“订单”。
- Costs move: no rent, but freight, commission and returns.
成本结构改变：没有店租，却多了运费、佣金与退货。
- Rules follow the transaction across borders.
规则随交易跨境而叠加。

Two governments, two firms, one word — and three different numbers. None of them has to be wrong.

“Online retail sales” 网络零售额

Counted: consumer purchases of goods through online channels

Not counted: B2B component procurement, internal document flows

统计消费者线上购买商品；不含企业间零部件采购与内部单据流转。

THE CONSEQUENCE

Two correct numbers, placed side by side, produce a comparison that means nothing.

两个都正确的数字并排放，会得出一个没有意义的比较。

“Ecommerce revenue” 电商收入

Counted: whatever the firm decides to report — goods, services, commissions, ads

Not counted: whatever falls outside that definition

统计口径由企业自定，可能含服务、佣金、广告；口径外的不计。

THE HABIT WE START TODAY

Before using a number, ask: which scope is this?

用任何数字前先问：这是哪一种口径？

Write the scope into the sentence: “platform-based consumer ecommerce is small”, not “ecommerce is small”.

把口径写进句子里：说“平台型消费者电商很小”，而不是“电商很小”。

NARROW 狭义电商

Transactions completed on a third-party platform.

在第三方平台上完成的交易。

ANSWERS

How large is platform-based retail?

平台零售有多大？

EXCLUDES

Excludes brand sites, B2B procurement, internal flows.

不含品牌独立站、企业间采购、内部流程。

SCOPE

one transaction · 一笔交易

BROAD 广义电商

The whole online journey: marketing, order, payment, logistics, after-sales.

覆盖营销、下单、支付、物流、售后的全过程。

ANSWERS

What does one customer journey involve?

一次完整的顾客旅程包含什么？

EXCLUDES

Excludes internal management and e-documents.

不含内部管理与电子单据。

SCOPE

one journey · 一次旅程

PAN 泛电商

Any business activity using electronic, digital and network tools.

一切使用电子、数字与网络工具的商业活动，含内部管理、电子单据、电子资金。

ANSWERS

How digital is a firm?

一家企业的数字化程度多高？

EXCLUDES

Excludes almost nothing — that is the point.

几乎不排除任何环节——这正是它的用处。

SCOPE

one firm · 一家企业

They are not three stages, and not three kinds of company. They are three boundaries drawn around the same activity.

三者不是三个阶段，也不是三类公司，而是围绕同一批活动画出的三条边界。

THE CLAIM

“Our country’s ecommerce market is small.”
“我们国家的电商市场很小。”

As platform retail 按平台零售口径

It may well be true. Few sellers list online; buyers lack trust.

可能成立：卖家少、买家信任不足。

As broad ecommerce 按广义电商口径

The same market may be far larger once delivery and after-sales are included.

同一市场在计入配送与售后后可能大得多。

As pan-ecommerce 按泛电商口径

Nearly every registered firm that uses e-mail or e-invoicing counts.

几乎每家使用邮件或电子发票的注册企业都会被算进去。

THE REWRITE RULE

Name the scope inside the sentence.

把口径写进句子里。

× “Ecommerce is small here.”

✓ “Platform-based consumer ecommerce is small here, while the wider delivery-and-after-sales market is growing.”

WHY IT MATTERS LATER

In Session 5 you will compare national markets. Every trap there is this trap, one level up.

Term 术语	What it covers 覆盖范围	Where you meet it 常见场景
Ecommerce 电商	The online purchase and sale of goods and services via the Internet. 通过互联网在线买卖商品与服务。	Retail transactions; market size; this course. 零售交易；市场规模；本课程。
Ebusiness 电子商务（企业）	The entire process of running a company via the Internet and intranet — ecommerce is one part of it. 通过互联网与内网运营一家企业的全过程，电商只是其中一部分。	Firm-level digital operations; supply chain; internal workflow. 企业数字化运营；供应链；内部流程。
Digital commerce 数字商务	Ebusiness and ecommerce conducted digitally, generating flows of data; the perspective is on information elements.	Digital trade policy; data flows; includes games, content, services.

In practice people say “ecommerce” for all three. In an exam answer, the useful move is to state the scope, not to defend the label. 在实践中三者常被混用；答题时真正有用的动作是说清口径，而不是为标签辩护。

A TEST FOR ANY STATEMENT

Which of the three is being described: a transaction, a firm, or an information flow?

这段话描述的是交易、企业，还是信息流？

If the answer changes the number, the scope was the point.

TEXTBOOK WORDING · 教材原文要点

Ecommerce could be one part of running an ebusiness. Digital commerce covers a much broader scope, including businesses such as game playing.

电商可以是电商企业运营的一部分；数字商务范围更宽，还包括游戏等业务。

✗ “*Buying on a phone is mobile commerce, so it is cross-border.*”
“手机上下单就是移动电商，所以就是跨境。”

✓ The device says nothing about the two parties or the customs territories. Mobile commerce is another dimension entirely.
设备只说明工具，不说明交易双方与关境；移动电商是另一个维度。

✗ “*Ecommerce means shopping online.*”
“电商就是在网上买东西。”

✓ B2B procurement, hotel nights, payments and data transfers are ecommerce too. The object is not the test.
企业间采购、酒店住宿、支付与数据转移同样是电商；对象不是判断标准。

✗ “*Narrow, broad and pan are three development stages.*”
“狭义、广义、泛电商是三个发展阶段。”

✓ They are three boundaries around the same activity, serving different questions — not a sequence.
它们是围绕同一批活动的三条边界，服务不同问题，不是先后阶段。

✗ “*The company calls itself a global ecommerce firm, so its orders are cross-border.*”
“公司自称全球电商，所以订单就是跨境。”

✓ Self-description is marketing. Test the order, not the slogan.
自我描述是营销话术；要检验订单，而不是检验标语。

Each of these four will come back in Session 5 as a statistical error, not just a vocabulary error.

这四个错误在第五次课会以“统计错误”的形式再次出现，而不只是用词错误。

Classify six activities

分类六种活动

8 minutes, in pairs · 两人一组, 8 分钟

01 Buying a phone case from a Shenzhen seller

向深圳卖家买手机壳

Ecommerce? Cross-border? Which scope?

02 Booking one night in a Bangkok hotel

预订曼谷一晚酒店

Ecommerce? Cross-border? Which scope?

03 Paying a supplier's invoice by online transfer

在线转账支付供应商账单

Ecommerce? Cross-border? Which scope?

04 Seeing a banner ad for shoes and not buying

看到鞋子横幅广告但没买

Ecommerce? Cross-border? Which scope?

05 Paying lunch with a QR code in the same city

同一城市扫码付午餐

Ecommerce? Cross-border? Which scope?

06 Downloading a paid app from a foreign store

从境外商店购买付费应用

Ecommerce? Cross-border? Which scope?

HOW TO ANSWER · 作答方法

- 1** Decide: is there a transaction, or only an advertisement?
先判断：是交易，还是只是广告？
- 2** If there is a transaction, which scope does it sit in?
若有交易，它落在哪一种口径里？
- 3** Then, and only then, say whether it is cross-border.
再判断是否跨境，顺序不能反。

WHAT WE COMPARE AFTERWARDS

Pairs disagree on 03 and 06 every year. Both are ecommerce; neither is a parcel. Ask what the payment bought.

每年都有分歧的是第 3 与第 6 项：两者都是电商，都没有包裹。追问“这笔钱买到了什么”。

Term 中文	Working definition 简要定义
Ecommerce 电商	Goods, services, money or data exchanged over electronic networks. 通过电子网络交换商品、服务、资金或数据。
Narrow ecommerce 狭义电商	Transactions completed on a third-party platform. 在第三方平台完成的交易。
Broad ecommerce 广义电商	The whole online journey, including delivery and after-sales. 包含配送与售后的完整线上旅程。
Pan-ecommerce 泛电商	Any business activity using digital and network tools. 使用数字与网络工具的一切商业活动。
Ebusiness 电子商务（企业）	Running a company via the internet and intranet. 通过互联网与内网运营企业。
Digital commerce 数字商务	Digitally conducted business, seen as information flows. 从信息流视角看的数字化商务。
Scope 口径	The objects, metric and period a statistic covers. 统计所覆盖的对象、指标与期间。

THREE THINGS TO KEEP

— The object is not the test; the electronic completion is.
对象不是标准，电子完成才是。

— A scope is a question, not a label.

口径是提问，不是标签。

— Name the scope inside the sentence.

把口径写进句子里。

BEFORE SESSION 2

Bring one real purchase of your own — cross-border or not. You will test it against three elements.
带一次自己的真实购买记录来上课，下次课用三个要素检验它。

Read: §1.2, Figure 1-3

02

SESSION 02 OF 6

Three elements, the actors, and one chain of nine steps

90 minutes

讲授 + 课堂任务 + 收束

Chapter 1

What makes a transaction cross-border?

什么使交易成为跨境

IN THIS SESSION · 本节目标

- 1 State the three elements of a cross-border transaction and test a new case against them.
说出跨境交易的三个构成要素，并用它检验一个新案例。
- 2 Explain why distance is not one of the three elements.
解释为什么“距离远”不是判断标准。
- 3 Separate platform from seller — who owns, who prices, who delivers.
区分平台与卖家：谁拥有商品、谁定价、谁负责交付。
- 4 Read one order as a chain of actors and services, and locate a failing link.
把一笔订单读成主体与服务的链条，并定位失败环节。

15 min

Warm-up
案例开场

35 min

Concept
概念讲解

30 min

Task
课堂任务

10 min

Wrap
收束

01

Different customs territory

不同关境

Buyer and seller are subject to different customs laws and tariff regimes.

买卖双方适用不同的海关法规与关税制度。

Evidence: two declarations, or a duty receipt.

证据：出口与进口两份申报，或一张税单。

02

Online transaction and settlement

在线成交与结算

The deal is agreed and paid electronically, not by letter of credit on paper.

交易在线达成、资金在线结算。

Evidence: order record plus payment confirmation.

证据：订单记录 + 支付确认。

03

Cross-border delivery

跨境交付

The goods physically move from one customs territory to another.

货物实际从一个关境运至另一个关境。

Evidence: export release and import clearance.

证据：出口放行与进口清关记录。

Two out of three is not cross-border.

满足两项不算跨境电商——三项必须同时成立。

Domestic sale + international courier fails 01. A cross-border gift fails 02. A digital service may fail 03 — and still be cross-border.

APPLY IT TO THE PHONE CASE

01 Shenzhen seller, Nairobi buyer: two customs administrations, two declarations.

深圳卖家，内罗毕买家，两套海关，两份申报。

02 Order placed in an app, paid by card, both recorded electronically.

应用内下单、刷卡支付，均在系统留痕。

03 A parcel crosses an international border; duty assessed on entry.

包裹跨越国境，入境时计征关税。

Result: all three hold! This is cross-border

ecommerce, not “long-distance shopping”.

结论：三项均满足，属跨境电商，而非“远距离购物”。

WHY NOT JUST “DISTANCE”?

Distance is a physical fact. Crossing a border is a legal one. Only the second changes the documents, the tax and the rules.

距离是物理事实，过关是法律事实；只有后者改变单据、税与规则。

CUSTOMS TERRITORY 关境

The area in which one set of customs laws and one tariff schedule applies.

适用同一套海关法规与关税制度的区域。

BECAUSE IT IS NOT THE SAME AS “COUNTRY”

Hong Kong, China; Macao, China and Taiwan, China are separate customs territories.

中国香港、中国澳门、中国台湾是单独的关税区。

The EU acts as one customs union for trade with third countries.

欧盟对外构成统一关税同盟。

Guangzhou → Harbin

广州 → 哈尔滨

2,800 km

2,800 公里

Same customs territory, same currency, one declaration regime. Long, but not cross-border.

同一关境、同一币种、一套申报制度。路途很长，但不跨境。

NOT CROSS-BORDER

Shenzhen → Hong Kong, China

深圳 → 中国香港

30 km

30 公里

Two customs territories: export declaration on one side, import clearance on the other.

两个关境：一侧出口申报，另一侧进口清关。

CROSS-BORDER

Ask “which customs administration handles this?” — not “how far did it travel?”

要问“由哪套海关管辖”，而不是“运了多远”。

Element 要素	What it adds in documents 新增单据	What it adds in cost and time 新增成本与时间	What it adds in risk 新增风险
Different customs territory 不同关境	Export declaration, import declaration, duty assessment 出口申报、进口申报、计税	Duty and VAT; clearance days; product standards 关税与增值税；清关天数；产品标准	Consignment held or rejected at the border 货物被扣留或退运
Online settlement 在线结算	Payment authorisation, chargeback file, electronic evidence 支付授权、拒付材料、电子证据	Acquiring fees; fraud screening; currency conversion 收单费；反欺诈审核；换汇	Chargeback with no signed contract; account frozen 无签字合同的拒付；账户被冻结

If a case really is cross-border, these three lines must appear in the analysis. If it is not, adding them is a category error.

案例若确实跨境，这三类成本与风险必须进入分析；若不跨境而强行加入，就是范畴错误。

A SHORTCUT FOR THE EXAM

Name the element → name the document → name who bears the cost. Three moves, one paragraph.

01 A domestic order that travels 2,800 km

跑得很远的国内订单

Guangzhou buyer, Harbin seller, RMB settlement, one customs regime.

✗ No border is crossed, whatever the distance or the courier.

无论多远、用哪家快递，都没有跨过关境。

02 A gift sent abroad, with no commercial transaction

无商业交易的跨境赠礼

The parcel crosses a border, but nothing is sold and nothing is settled online.

✗ Fails element two: there is no transaction to speak of.

缺第二项：没有可言的交易与结算。

03 A domestic sale that uses an international courier

国内销售走国际快递

The seller is domestic, the buyer is domestic, the courier happens to be global.

✗ The carrier's nationality is not the buyer's or the seller's.

承运人的国籍不是买卖双方的关境。

The three elements are a filter, not a slogan: run them one by one and write the evidence next to each.

三要素是过滤器而不是口号：逐项检验，并在每一项旁写下证据。

Sellers and brands

卖家与品牌

List the goods, own the stock, set the price, bear delivery.

上架商品、拥有库存、制定价格、承担交付。

Do not control: platform rules, clearance speed.

Platforms

平台

Provide the market space and the rules; often payment and dispute tools.

提供市场空间与规则，常兼支付与纠纷工具。

Do not own the goods they list.

Buyers and consumers

买家与消费者

Choose, pay, receive, and hold the right to return.

选择、支付、收货，并享有退货权利。

Bear: duty at the door, waiting time, mismatch risk.

Supporting services

支撑服务

Payment, logistics, customs brokerage, finance, marketing.

支付、物流、报关、金融、营销。

Are indispensable but are not parties to the sale.

Every delay or extra cost can be attributed to one of these four groups. That attribution is the analysis.

每一笔延误或额外成本都能归到上述四类主体之一；这个归因就是分析本身。

THE FOUR QUESTIONS THAT SETTLE IT

- 1 Who owns the goods before delivery?
交付前货物归谁?
→ **The seller holds the stock; the platform holds a listing.**
- 2 Who sets the price?
谁定价?
→ **The seller, within the platform's fee structure.**
- 3 Who is responsible for delivery?
谁对交付负责?
→ **The seller; the logistics provider executes.**
- 4 Who answers the dispute?
谁应对纠纷?
→ **The platform provides the channel; the seller compensates.**

WHAT THE CONFUSION COSTS YOU

- ▶ Believe the platform is the seller
以为平台就是卖家
- ▶ So you blame the platform for a delay it does not control
于是把不可控的延误算在平台头上
- ▶ So you misjudge who pays for the return, and who carries the risk
于是判断错退货与风险的承担者
- ▶ So your remedy is aimed at the wrong party — and fails
于是救济措施指向错的主体，注定失效

Price, ownership and liability are three different questions. One actor can answer all three — a seller; no platform does.

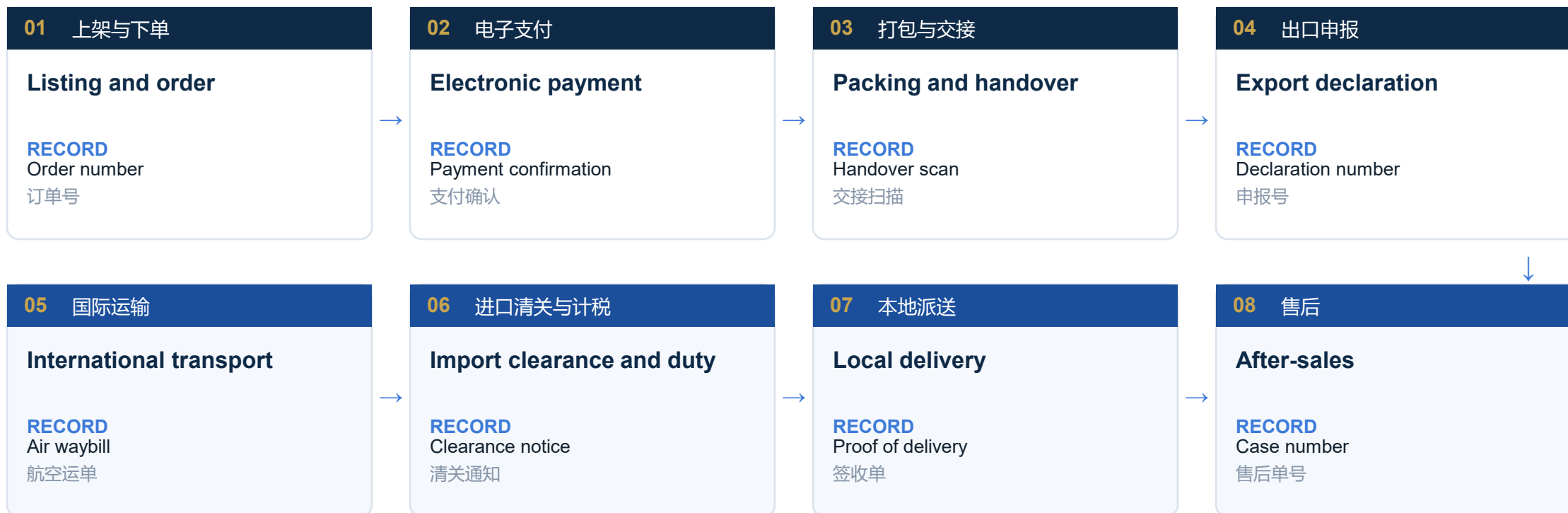
SAY IT IN ONE SENTENCE · 一句话概括

The platform owns the market, the seller owns the goods; the platform writes the rules, the seller answers for the parcel.

平台拥有市场，卖家拥有商品；平台写规则，卖家对包裹负责。

Test it on any listing you open tonight: who is the merchant of record?

今晚打开任意商品页，都能找到“记录商家”是谁。



Every step leaves one record. A complaint that names the record is a claim; a complaint that names no record is a mood.

每一步都留下一份记录：说得出单号的投诉是主张，说不出单号的投诉只是情绪。

- Money flows backwards: buyer → platform → seller → service providers.
资金逆向流动：买家→平台→卖家→服务商。

- Information flows both ways at every step, and that is what makes the chain auditable.
信息在每一步双向流动，链条因此可核查。

Q1 Which three elements make this order cross-border? Name the evidence for each.

哪三个要素使这笔订单成为跨境？各自的证据是什么？

Q2 Which steps does the seller control, which the platform, which the services?

哪些步骤由卖家控制、哪些由平台控制、哪些由支撑服务控制？

Q3 If the case arrives cracked, whom should the buyer contact first, and why?

包裹破损时买家应先联系谁？为什么？

Q4 If the same case were bought in a local shop, which steps and costs would disappear?

若在本店商店购买同款，哪些步骤与成本会消失？

TEACHING NOTE · 教学提示

Draw the chain on the board and let students place each actor. Keep three words apart: ownership (seller), coordination (platform), execution (logistics, clearance).

THE FOLLOW-UP QUESTION

“Who actually controls the transport timetable?”

Most students blame the platform. The timetable belongs to the carrier and the clearance office.

Draw one order as a chain

把一笔订单画成链条

12 minutes, in pairs · 两人一组, 12 分钟

THE BRIEF

**Take one of your own purchases, or the phone case.
Draw the chain from listing to receipt.**

选一次自己的购买, 或使用手机壳案例, 从页面到收货画出完整链条。

- Boxes: actors and services
方框: 主体与服务
- Three arrows: goods, money, information
三种箭头: 货流、资金流、信息流
- Circle: the one link you think fails most often
圈出你认为最易失败的一环

DELIVERABLE · 产出

One diagram with three flows, plus one sentence: "If this link fails, the buyer experiences ..."

TIMED STEPS · 分步计时

- 2 Choose the purchase; write the first and last step.
选定购买, 写出首尾两步。
- 5 Draw the boxes and the three flows.
画出方框与三种流动。
- 3 Mark who controls what: seller, platform, services.
标注谁控制什么。
- 2 Pick the weakest link and finish the sentence.
选出最弱一环, 补完那句话。

Two pairs compare at the end: where did your weakest links differ?
最后两组对照: 各自的最弱一环是否相同?

Most pairs discover that the platform is blamed for a link it does not operate. That is the lesson.

多数小组会发现: 被怪罪的平台, 其实并不操作那一环。这就是本课的落点。

Term 中文	Working definition 简要定义
Cross-border ecommerce 跨境电商	Different customs territories, online settlement, cross-border delivery — all three. 不同关境、在线结算、跨境交付，三者齐备。
Customs territory 关境	Where one customs law and one tariff schedule apply. 适用同一海关法规与关税制度的区域。
Settlement 结算	The completion of payment between buyer and seller. 买卖双方完成资金收付的环节。
Listing 商品页面	One product's display-and-order entry on a platform. 平台上单件商品的展示与交易入口。
Supporting service 支撑服务	Payment, logistics, clearance, finance, marketing — not a party to the sale. 支付、物流、报关、金融、营销，非交易当事人。
Merchant of record 记录商家	The party legally responsible for the sale. 对交易负法律责任的卖方。
Declaration 报关单	The document filed with customs for export or import. 向海关提交的出口或进口申报文件。

THREE THINGS TO KEEP

— Three elements, all three, with evidence.

三个要素，三项齐备，且各有证据。

— Customs territory, not distance.

看关境，不看距离。

— The platform is not the seller.

平台不是卖家。

BEFORE SESSION 3

Bring your diagram. We will put the whole ecosystem around it and price every step.

带上你的链条图。下次课把整个生态系统套上去，并给每一步定价。

Read: §1.2.2, Figure 1-3

03

SESSION 03 OF 6

Figure 1-3, the supporting services, and §1.3

90 minutes

讲授 + 课堂任务 + 收束

Chapter 1

The ecosystem around one order

一笔订单周围的生态系统

IN THIS SESSION · 本节目标

- 1 Draw the ecosystem and say what each layer contributes.
画出生态系统图，并说明每一层贡献什么。
- 2 Explain why a supporting service is indispensable but not a party to the sale.
说明支撑服务为何不可或缺却不是交易当事人。
- 3 Compare traditional commerce and cross-border ecommerce on reach, channel and intermediaries.
从覆盖范围、渠道与中间环节比较传统商务与跨境电商。
- 4 Put a cost or delay on a specific link instead of blaming “logistics”.
把成本或延误落到具体环节，而不是笼统归因于“物流”。

15 min
Warm-up
案例开场

35 min
Concept
概念讲解

30 min
Task
课堂任务

10 min
Wrap
收束

SUPPORTING SERVICES 支撑服务

- Payment and settlement 支付与结算
- Logistics and last mile 物流与末端配送
- Customs clearance 通关与报关
- Finance and insurance 金融与保险
- Marketing and traffic 营销与流量

THE TRANSACTION 交易本身

Upstream: suppliers and brands

上游：供应商与品牌

White label factories, brand owners, wholesalers



Platform: the marketplace

中游：跨境电商平台

Market space, rules, payment tools, disputes



Downstream: consumers

下游：消费者

Buyers in another customs territory

THREE FLOWS 三种流动

Goods *downstream, physical*
货物

Money *upstream, electronic*
资金

Information *both ways, continuous*
信息

THE TWO DISTINCTIONS THAT MATTER

① The platform is not the seller.

② A supporting service is not a party to the sale.

① 平台不是卖家。

② 支撑服务不是交易当事人。

报关行与支付机构不可或缺，但并不买卖货物。

Read the first three boxes as the transaction, and the left column as what makes the transaction possible.

前三个方框是交易本身，左栏是使交易得以发生的服务。

01 Start with the flows, not the boxes

先看流动，再看方框

Goods move one way, money the other, information both ways. If a flow stops, the order stops.

货物单向、资金反向、信息双向；任一流中断，订单即中断。

02 Then ask who controls each box

再问每一格由谁控制

A seller controls stock and packing; a platform controls listing and dispute rules; a carrier controls timetables.

卖家控制库存与打包；平台控制页面与纠纷规则；承运人控制时效。

03 Finally, locate the failing box

最后定位失败的那一格

“The delivery was bad” becomes “the handover between line-haul and last mile failed, and no one scanned it”.

“配送很差”应变成“干线到末端的交接失败，且没有扫描记录”。

BEFORE YOU JUDGE A CHAIN

Ask three questions of every box: who is responsible, what record proves it, and what happens to the buyer if it fails.

A PHRASE TO RETIRE

“Cross-border shopping is unreliable.”

Replace it with a sentence that names a box and a record. Then it can be tested — and fixed.

Payment 支付

Authorises the card, holds the funds, converts currency, handles chargebacks.

授权刷卡、托管资金、换汇、处理拒付。

FAILS AS

Failed authorisation; chargeback with no signed contract; account frozen.

授权失败；无签字合同的拒付；账户冻结。

Logistics 物流

Line-haul, consolidation, last mile, and the handover scans between them.

干线、集运、末端派送，以及其间的交接扫描。

FAILS AS

Missed scan; consolidation delay; damage in transit.

扫描缺失；集运延误；运输破损。

Customs clearance 清关

Files the declaration, classifies the goods, assesses duty.

提交申报、归类商品、计征税款。

FAILS AS

Wrong HS code; missing certificate; consignment held.

归类错误；缺少证书；货物被扣。

Finance and marketing 金融与营销

Working capital, trade credit, insurance, traffic and advertising.

流动资金、贸易融资、保险、流量与广告。

FAILS AS

Cash tied up in stock; ad cost rising faster than margin.

资金压在库存；广告成本快于毛利上涨。

None of the four sells anything. Remove any one of them and the order stops — that is what “supporting” means.

这四类都不卖货。抽掉任意一类，订单就停——这就是“支撑”的含义。

Dimension 维度	Traditional commerce 传统商务	Cross-border ecommerce 跨境电商
Reach 覆盖范围	Local, at most national; limited by shop location. 以本地为主，最多到全国，受门店位置限制。	National or international from day one; limited only by logistics. 一开始就可面向全国甚至全球，只受物流能力限制。
Channel 渠道	Physical storefront; rent, insurance, maintenance, property tax. 实体门店；需承担租金、保险、维护与房产税。	Digital storefront; a warehouse may still be needed, but no shop. 数字店面；可能仍需仓库，但不需要门店。
Intermediaries 中间环节	Wholesalers and distributors between producer and buyer. 生产与购买之间有批发商、经销商。	Platforms and marketplaces act as intermediaries, like a market fair. 平台与市场充当中间人，类似集市。
Information 信息	Asymmetric; the buyer sees what the shelf shows. 信息不对称；买家只能看到货架上的东西。	Search, reviews and comparison; the buyer sees many sellers at once. 搜索、评价与比价；买家一次看到众多卖家。
Cost base 成本结构	Rent and staff are fixed; scale needs more shops. 租金与人力是固定成本；扩张需开更多店。	Traffic and logistics are variable; scale needs more ad spend. 流量与物流是可变成本；扩张需更多广告投入。
Who is displaced 被替代者	— —	Local retailers lose footfall; distributors lose the middle. 本地零售商流失客流；经销商失去中间位置。

The comparison is not “new beats old”: it is a change in which cost is fixed and which one grows with volume.

比较的落点不是“新胜旧”，而是哪一种成本变成固定、哪一种随规模上升。

Distribution got cheaper

分销变便宜了

A cheaper and more efficient distribution channel replaced the shop, the agent and the trade fair.

更便宜高效的分销渠道，替代了门店、代理与展会。

Reach became a setting, not a project.

覆盖范围成了设置项

A firm can appear in another market without opening a branch there.

不必在当地设分支，也能出现在那个市场。

The marketplace became the market fair

平台成了集市

Xianyu, eBay and Etsy put many buyers and sellers in one place, as a fair once did.

闲鱼、eBay、Etsy 把众多买卖双方聚到一处，如同旧时集市。

THE OTHER SIDE OF THE SAME SENTENCE

Amazon, Alibaba and JD gained share by changing how retail works — and forced traditional retailers to change with them.

亚马逊、阿里巴巴、京东通过改变零售方式获得份额，并迫使传统零售商随之改变。

Individual sellers also went online through their own websites — not every seller needs a marketplace.

SO WHAT IS THE NEW CONSTRAINT?

- Not access — everyone has access.
不是“进不去市场”——人人进得去。
- But attention, trust and delivery.
而是注意力、信任与交付。
- Which is why traffic cost is now a challenge.
这也是流量成本成为挑战的原因。

Eight cost lines, and who sets each

八条成本线，各由谁决定

Use this to price any order · 用于给任意订单定价

Cost line 成本项	Set by 由谁决定	Borne by 由谁承担	Moves with 随什么变化
Goods 货值	Seller, from cost and target margin 卖家，按成本与目标毛利	Buyer 买家	Volume, sourcing 采购量、货源
International freight 国际运费	Carrier, by weight, volume and route 承运人，按重量、体积、航线	Usually the buyer 通常由买家承担	Distance, fuel, season 距离、油价、旺季
Insurance 保险	Insurer, by declared value and risk 保险人，按申报价值与风险	Seller or buyer 卖家或买家	Value, route risk 货值、路线风险
Duty and VAT 关税与增值税	Importing customs, by tariff line 进口国海关，按税则号列	Buyer at the door 买家收货时	Origin, classification 原产地、归类
Platform commission 平台佣金	Platform, by category 平台，按类目	Seller 卖家	Price, category 售价、类目
Payment fee 支付费用	Acquirer, by method and currency 收单机构，按方式与币种	Seller 卖家	Method, chargebacks 支付方式、拒付率
Last mile 末端配送	Local carrier, by density 本地承运商，按订单密度	Buyer or seller 买家或卖家	Address density 地址密度

Six of the eight are set outside the seller's own firm. That is the structural reason cross-border margins are thin.

八条中有六条不由卖家自己决定——这是跨境电商毛利薄的结构性原因。

Which failure would stop a small seller first?

Discussion · 10 minutes, groups of four

哪一种失败会先拖垮小卖家

A A customs hold on one consignment

一票货物被海关扣留

Cash is already spent; the goods sit and the buyer cancels.

How long can a small firm survive it?

B A chargeback wave

一波拒付

The account is frozen and the settlement cycle breaks.

How long can a small firm survive it?

C Parcel damage in transit

运输破损

Refund plus return freight, and the review score falls.

How long can a small firm survive it?

D Ad costs rising 30%

广告成本上涨 30%

Acquisition cost exceeds contribution margin.

How long can a small firm survive it?

There is no single right answer — but there is a testable one: which failure converts into a cash gap fastest?

没有唯一答案，但有一个可检验的判断标准：哪一种失败最快转化为现金缺口？

THE ANSWER WE ARE LOOKING FOR

Not the biggest loss, but the one that arrives before the next payment cycle. Rank the four by time-to-cash-gap, not by size.

Term 中文	Working definition 简要定义
Ecosystem 生态系统	Actors plus supporting services that together complete an order. 主体与支撑服务共同完成订单的环境。
Supporting service 支撑服务	Payment, logistics, clearance, finance, marketing. 支付、物流、通关、金融、营销。
Line-haul 干线运输	The long-distance leg between consolidation points. 集散点之间的长距离运输段。
Last mile 末端配送	From the local depot to the buyer's door. 从本地网点到买家门口。
Consolidation 集运	Combining parcels to lower freight per unit. 合并包裹以降低单件运费。
Distribution channel 分销渠道	The path goods take from producer to buyer. 商品从生产到买家的路径。
Marketplace 第三方平台	A place where many buyers and sellers meet, as at a fair. 众多买卖双方汇聚之处，如集市。

THREE THINGS TO KEEP

— Four boxes make the transaction; the left column makes it possible.
四个方框是交易，左栏使交易得以发生。

— A service is indispensable, not a party.

支撑服务不可或缺，但不是当事人。

— Name the box before you judge the chain.

先说出是哪一格，再评价这条链。

BEFORE SESSION 4

Read §1.5 and find one company that existed before 2000 and still sells online. What did it have to change?

阅读 §1.5，找一家 2000 年前成立、今天仍在网上销售的企业：它改变了什么？