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DIGITAL PLATFORM-BASED TRANSFORMATION OF ENTERPRISE E-COMMERCE SYSTEMS: FACTORS, EFFICIENCY AND DEVELOPMENT PROSPECTS

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Abstract: This article analyzes the development trends and prospects of the e-commerce market in Central Asian countries. The study examines the growth of e-commerce turnover, the level of mobile device usage, cross-border trade activities, and the impact of digital platforms on market development. The findings indicate that the e-commerce market in the region is developing rapidly, while further improvements in logistics infrastructure and internet coverage can create additional opportunities for sustainable growth. The article provides practical recommendations for enhancing the efficiency and development potential of e-commerce.

Keywords: e-commerce, Central Asia, digital economy, mobile commerce, marketplace, cross-border trade, digital payment systems, logistics.

Аннотация: В данной статье проанализированы тенденции развития и перспективы рынка электронной коммерции в странах Центральной Азии. Исследованы рост объёмов электронной торговли, уровень использования мобильных устройств, процессы трансграничной торговли и влияние цифровых платформ на развитие рынка. Результаты показывают, что рынок электронной коммерции региона развивается быстрыми темпами, а дальнейшее совершенствование логистической инфраструктуры и расширение интернет-покрытия создают дополнительные возможности для устойчивого роста. В статье предложены практические рекомендации по повышению эффективности и дальнейшему развитию электронной коммерции.

Ключевые слова: электронная коммерция, Центральная Азия, цифровая экономика, мобильная коммерция, маркетплейс, трансграничная торговля, цифровые платёжные системы, логистика.

INTRODUCTION

Today, e-commerce is considered one of the fastest-growing sectors of the global economy. The development of Internet technologies, the increasing use of mobile devices, and the advancement of digital payment systems have contributed to the continuous growth of online sales. This trend is also evident in the countries of Central Asia. In recent years, the growing number of Internet users, the widespread adoption of mobile Internet services, and the development of electronic payment systems have contributed significantly to the expansion of the e-commerce market in the region. In particular, the rapid development of marketplace platforms, mobile applications, and digital services in Uzbekistan and Kazakhstan has contributed to a substantial increase in the volume of online trade.

At the same time, the level of e-commerce development differs across countries, reflecting their diverse levels of digital and economic development. Factors such as logistics infrastructure, Internet coverage, digital literacy, and the development of electronic payment systems have a direct impact on the growth rate of the e-commerce market. Further improvement in these areas can create additional opportunities for accelerating e-commerce development across Central Asia. This situation highlights the importance of analysing the current state of the e-commerce market in Central Asian countries and assessing its future development prospects.

LITERATURE REVIEW

The development of the e-commerce market, digital platforms, and cross-border trade has been extensively studied by Kenneth Laudon and Carol Traver [1], David Chaffey [2], Efraim Turban [3], Gary Schneider [4], and Arkadiusz Kawa [5]. Their studies examine the development trends of e-commerce business models, online marketplace platforms, digital marketing, mobile commerce, and electronic payment systems. E-commerce infrastructure, logistics systems, and cross-border e-commerce in Central Asian and other developing countries have also been investigated by scholars such as K. S. Kholodkova [6], E. V. Tkachenko [7], and O. Yu. Pankina [8]. Their research substantiates the importance of Internet coverage, logistics infrastructure, and digital payment systems in supporting the development of e-commerce.

Among Uzbek scholars, the works of B. Yu. Khodiev, Sh. Kh. Mustafakulov, and A. T. Kamilov have focused on the development of the digital economy, the e-commerce market, and digital platforms in Uzbekistan. These studies provide an important scientific foundation for understanding ongoing digital transformation processes. At the same time, a comprehensive assessment of e-commerce market growth dynamics, the development of mobile commerce, and the prospects for cross-border trade in Central Asian countries remains an important and relevant area for further research.

RESEARCH METHODOLOGY

The study employed a set of methodological approaches to assess the current state and development trends of the e-commerce market in Central Asian countries. The theoretical framework of the study was based on scientific literature addressing e-commerce, the digital economy, digital platforms, and cross-border trade. Empirical data were obtained from international analytical institutions, national statistical agencies, and reports on e-commerce market development.

The study applied economic and statistical analysis, comparative analysis, and a systematic approach. The e-commerce turnover, Internet penetration, mobile commerce adoption, and market growth indicators of Central Asian countries were compared. Particular attention was given to the key factors influencing the development of enterprise e-commerce systems, including digital platform adoption, digital infrastructure, electronic payment systems, logistics infrastructure, and mobile commerce.

The analysis also considered the role of digital marketplaces and platform-based business models in expanding enterprises' market access and improving the efficiency of e-commerce operations. During the preparation and linguistic refinement of the article, artificial intelligence tools were used to a limited extent, not exceeding 10%, while the selection of sources, analytical interpretation, scientific assessment, and formulation of conclusions remained under the authors' responsibility. The obtained results were systematized and interpreted to identify the major factors affecting the development of enterprise e-commerce systems and to formulate scientific conclusions and practical recommendations for improving their performance in the context of the digital economy.

ANALYSIS AND RESULTS

The analysis shows that the e-commerce market in Central Asian countries has demonstrated sustained growth in recent years. Kazakhstan and Uzbekistan, in particular, have emerged as leading e-commerce markets in the region, accounting for a substantial share of overall regional e-commerce activity. The findings indicate that the expansion of Internet access, the increasing use of mobile devices, and the continued development of digital payment systems have significantly contributed to the growth of e-commerce across the region.

The analyzed data indicate that approximately 90% of e-commerce users make purchases through mobile devices, highlighting the increasingly important role of mobile commerce in the regional e-commerce market. This trend creates additional opportunities for enterprises to adapt their e-commerce systems to mobile platforms and develop convenient, accessible, and user-oriented digital channels for customer interaction. Furthermore, the expansion of cross-border e-commerce is opening new opportunities for local enterprises to enter international markets, broaden their customer base, strengthen their competitiveness, and expand the geographical reach of their online sales.

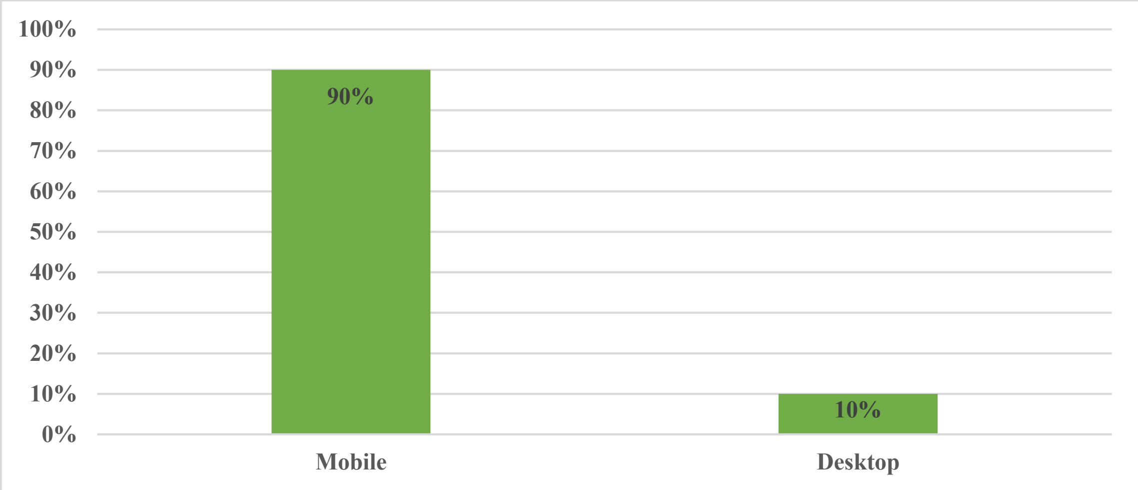

Figure 1. Share of devices used by users of e-commerce platforms and systems.

The above Figure 1 demonstrates the strong role of mobile technologies in the development of e-commerce platforms and systems. Specifically, 90% of users rely on smartphones when purchasing products or services, while 10% use computers. This distribution highlights the high level of mobile engagement among consumers and reflects the growing importance of mobile commerce across Central Asia. The regional e-commerce sector is currently entering a promising stage of development, gradually evolving from an emerging market into a dynamic center of the digital economy. With a total population exceeding 75 million and annual GDP growth projected at approximately 4–5%, Central Asia has favorable demographic and economic conditions for further e-commerce expansion. In addition, the region's strategic geographical position between Europe, Russia, and China creates significant opportunities to strengthen trade connectivity, logistics networks, and integration into international digital markets.

In recent years, Internet penetration has increased considerably, reaching approximately 77–87% in leading markets, particularly Kazakhstan and Uzbekistan. This progress is creating favorable conditions for the wider adoption of digital platforms and is encouraging positive changes in consumer purchasing behavior. The increasing accessibility of online services, digital payments, and mobile applications is also contributing to the formation of a more flexible and technologically advanced retail environment.

Cross-border e-commerce is developing particularly rapidly and is opening new opportunities for enterprises across the region. Export and import operations conducted through international and regional digital platforms, including Russian platforms, are demonstrating annual growth rates of approximately 50–80%. This development provides local producers with broader access to international consumers and creates favorable conditions for promoting textiles, agricultural products, and other domestically produced goods in foreign markets. As a result, Central Asian enterprises are gaining new opportunities to diversify sales channels, strengthen competitiveness, and become more actively integrated into global e-commerce value chains.

The current share of e-commerce in retail trade, estimated at approximately 4–16%, also demonstrates considerable potential for further expansion when compared with the global average of around 20–30%. This gap should be viewed as an important growth reserve for the region, particularly as digital infrastructure, consumer confidence, payment systems, and online services continue to improve. The region's landlocked geographical position further encourages the development of efficient transport corridors, modern logistics centers, multimodal delivery systems, and stronger regional cooperation, all of which can support the competitiveness of e-commerce.

The continued expansion of reliable broadband Internet access in rural areas also represents an important development opportunity. With current coverage estimated at around 40% of rural households, further improvement in digital connectivity can significantly widen access to e-commerce platforms, create new opportunities for rural entrepreneurs, increase consumer participation, and support more inclusive digital economic growth. Overall, the combination of expanding Internet access, strong mobile usage, growing cross-border trade, improving logistics infrastructure, and favorable economic conditions provides a solid foundation for the long-term and sustainable development of e-commerce in Central Asia.

Table 1.
E-commerce turnover and growth indicators in central asian countries.

No.	Countries	2023 E-Commerce Turnover (USD)	2024 E-Commerce Turnover (USD)	Annual Growth	Key Factors
1	**Kazakhstan**	USD 5.3 billion	USD 7.3 billion	38%	Dominance of Kaspi.kz, 16.6% retail share
2	**Kyrgyzstan**	USD 359 million	USD 360 million	~0–5%	Exports through Wildberries, development of mobile payments
3	**Tajikistan**	~USD 20 million	USD 22.4 million	5%	New legislation, low Internet penetration (~4%)
4	**Turkmenistan**	~USD 325 million	~USD 350 million (estimated)	12% (projected)	Infrastructure development, cross-border trade opportunities
5	**Uzbekistan**	USD 543 million–1 billion (various estimates)	~USD 700 million (estimated)	30–40%	Uzum platform, 4% retail share

The data presented in Table 1 demonstrate notable differences in the size and growth dynamics of the e-commerce market across Central Asian countries. Kazakhstan and Uzbekistan show particularly strong growth rates, supported by the rapid development of digital platforms, marketplace systems, and related digital services. At the same time, Tajikistan and Turkmenistan demonstrate considerable potential for further e-commerce expansion as digital infrastructure, Internet accessibility, electronic payment systems, and broader digital-economy initiatives continue to develop. Overall, these differences reflect the diverse stages of digital transformation across the region and highlight significant opportunities for further growth and deeper integration of Central Asian countries into the regional and global e-commerce ecosystem.

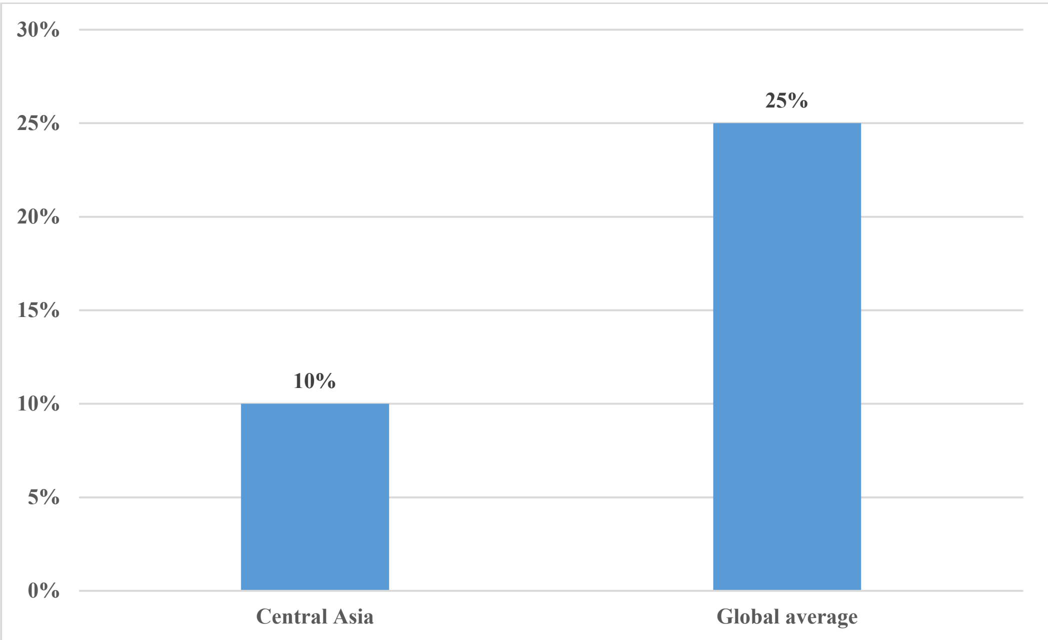

Figure 2. E-commerce market growth rate in central asia and globally.

The diagram demonstrates a notable difference between the e-commerce market growth rate in Central Asia and the global average. It shows that the annual growth rate of e-commerce in the Central Asian region is approximately 10%, while the corresponding global indicator is 25%. This difference reflects the fact that e-commerce in Central Asian countries is at an active stage of market formation and digital transformation, creating substantial opportunities for further expansion. In comparison, the global e-commerce market has reached a more advanced stage of development, supported by extensive digital infrastructure, mature consumer behavior, and continuous technological innovation.

The current growth dynamics in Central Asia should be viewed as an important development opportunity. Further improvements in digital infrastructure, logistics systems, electronic payment services, and Internet accessibility can create favorable conditions for accelerating e-commerce growth across the region. These factors highlight the Central Asian e-commerce ecosystem as a promising area for research on digital transformation and sustainable market development. The region, comprising Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan, has a population of approximately 75 million and a relatively young demographic structure, with more than 50% of the population under 30 years of age. Combined with the region's historical Silk Road heritage and strategic geographical position, this demographic advantage strengthens Central Asia's potential to develop digital trade links between East and West through modern platform-based business models.

As of 2024, the regional e-commerce market reached USD 14.7 billion, representing annual growth of 32% compared with USD 11.1 billion in 2023. This growth rate was significantly higher than the global average of 9.4%, demonstrating the increasing dynamism of the regional digital market. According to analyses provided by IMARC Group, this expansion has been supported by several favorable factors, including mobile phone penetration exceeding 100% in urban areas, particularly in Kazakhstan and Uzbekistan; the implementation of national digital-development strategies such as Digital Uzbekistan – 2030; and the growing presence of regional and international digital platforms.

Overall, e-commerce development across Central Asia demonstrates diverse but positive growth trajectories. In countries where digital platforms, mobile payment systems, and Internet infrastructure are developing more rapidly, the market is showing particularly strong expansion. In other countries, continued improvements in logistics, digital connectivity, and investment conditions are expected to create additional opportunities for market growth. The current share of e-commerce in retail trade, which remains below the global average, should therefore be regarded as a significant reserve for future expansion. Continued development of digital infrastructure, wider adoption of electronic payment services, stronger cross-border trade mechanisms, and increased investment in digital platforms can further support the sustainable and inclusive growth of e-commerce throughout the region.

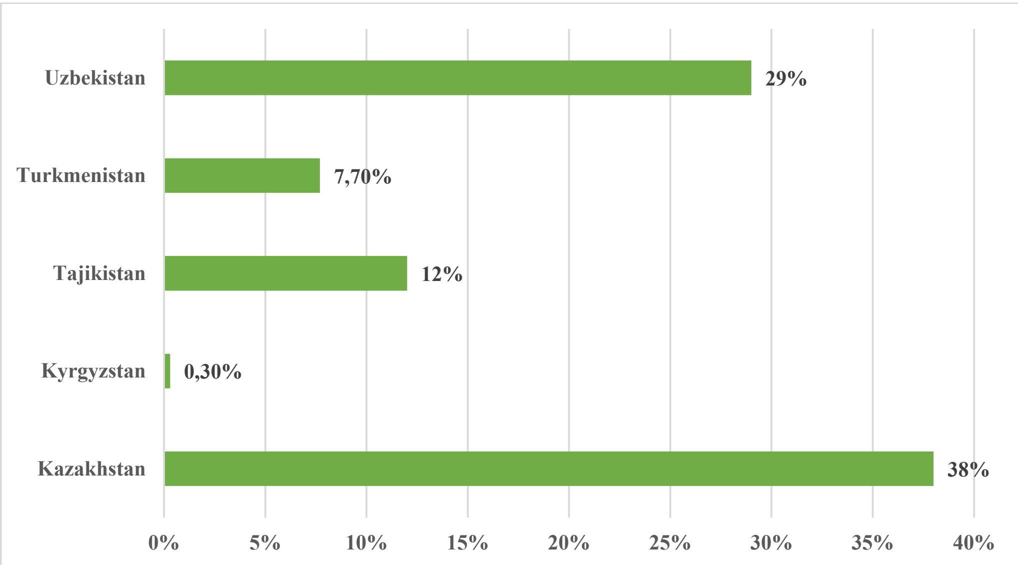

Figure 3. E-commerce growth rates in central asian countries.

During 2023–2024, e-commerce growth rates across Central Asia demonstrated diverse but generally positive dynamics. Kazakhstan, with a growth rate of 38%, and Uzbekistan, with 29%, showed the strongest expansion and maintained leading positions in the regional e-commerce market. Tajikistan, with a growth rate of 12%, demonstrated steady progress, while Turkmenistan, with 7.7%, continued to develop its e-commerce sector at a more gradual pace. Kyrgyzstan, with a growth rate of 0.3%, also retained opportunities for further digital market expansion. Overall, the region reflects different stages of e-commerce development, shaped by variations in digital infrastructure, Internet accessibility, electronic payment systems, logistics services, and institutional support.

In particular, the active expansion of marketplace platforms, mobile payment services, and government programs supporting the digital economy in Kazakhstan and Uzbekistan has contributed significantly to the rapid development of e-commerce. In other Central Asian countries, continued improvements in Internet accessibility, logistics efficiency, e-commerce infrastructure, and digital services can create additional opportunities for stronger market growth. At the same time, the current share of e-commerce in retail trade, which remains below the global average in most countries of the region, should be viewed as an important reserve for future development rather than a limitation.

This situation indicates that Central Asia retains considerable potential for further e-commerce expansion. Continued investment in digital infrastructure, improvements in Internet service quality, wider adoption of electronic payment systems, and the development of cross-border trade mechanisms can further strengthen the efficiency, competitiveness, and sustainability of the regional e-commerce ecosystem.

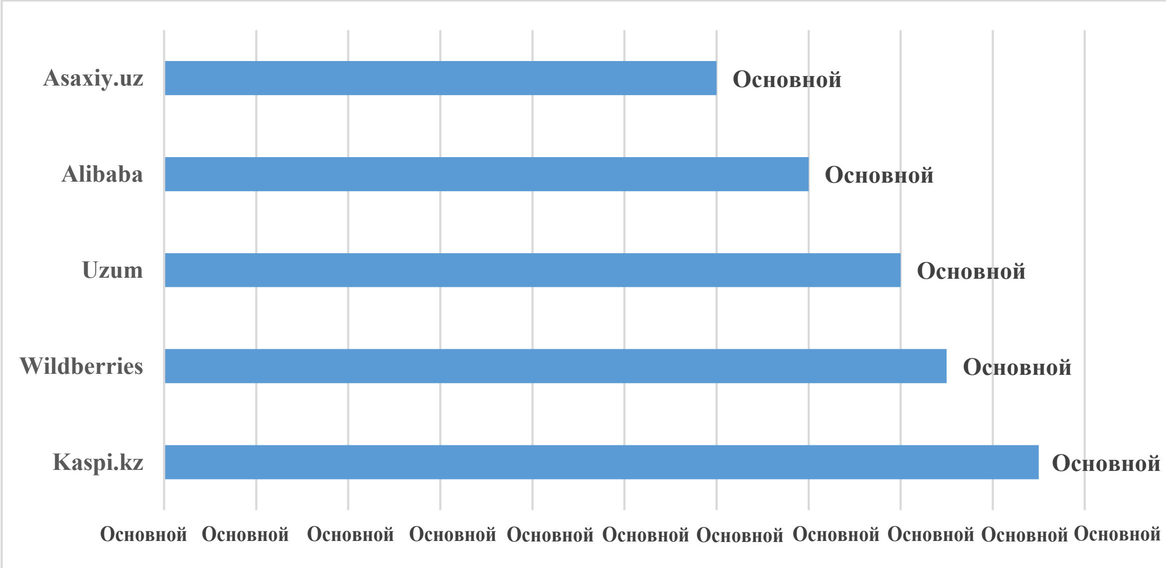

Figure 4. Top e-commerce platforms in central asia.

To assess the level of development of e-commerce platforms in the Central Asian region, their performance was examined using a comprehensive analytical approach. In particular, an integrated 0–100 point assessment scale was developed based on key indicators such as market share, number of users, sales turnover, logistics infrastructure, payment system integration, and customer activity. This approach makes it possible to evaluate not only the commercial performance of individual platforms but also the maturity and diversity of their digital ecosystems.

According to the assessment results, Kaspi.kz ranked first in the region with a score of 95 points. Its strong position is supported by a multifunctional ecosystem that integrates e-commerce, digital payments, and banking services within a single platform. Wildberries ranked second with 85 points and contributes significantly to the expansion of cross-border e-commerce and wider consumer access to digital marketplaces. Uzum, with a score of 80 points, stands out as one of the leading national digital ecosystems in Uzbekistan and has demonstrated particularly dynamic growth in recent years.

Alibaba Group, which operates globally, received 70 points and continues to facilitate international trade and broaden access to foreign products and suppliers within the region. Asaxiy.uz, with a score of 60 points, demonstrates a stable and growing presence in the domestic market. Overall, the assessment results indicate that competition among e-commerce platforms in Central Asia is increasingly shaped not only by sales volumes but also by service diversification, technological integration, customer convenience, and the overall development of digital ecosystems. In particular, platforms operating according to the super-app model demonstrate strong competitive potential because they provide users with a broad range of interconnected services within a single digital environment.

The e-commerce sector in Central Asia is increasingly developing through a complementary hybrid model. Locally developed platforms based on the integration of financial and commercial services through the super-app model are strengthening national digital ecosystems, while international and regional platforms, including Russian and Chinese companies, are expanding cross-border trade opportunities and increasing the diversity of digital services available to consumers. The interaction of local and international platforms contributes to stronger market competition, wider consumer choice, technological exchange, and deeper integration of Central Asia into the global e-commerce ecosystem.

Table 2.
Key indicators and competitive advantages of e-commerce platforms in Central Asia.

Platforms	Main Market	Key Indicators (2024)	Competitive Advantage
Kaspi.kz	Kazakhstan	USD 2.1 billion in revenue; 30 million monthly users	Fintech and e-commerce integration; super-app model
Uzum	Uzbekistan	USD 1.6 billion valuation; 800,000 products	Installment payment system; rapidly growing unicorn
Wildberries	Across the region	USD 614 million in sales in Kazakhstan; 15,000 sellers in Kyrgyzstan	Export-oriented platform; expansion into new markets, including Tajikistan
Mechta.kz	Kazakhstan	Top-3 marketplace	Specialized in local logistics systems
Asaxiy.uz	Uzbekistan	Leading platform in its category segment	P2P (peer-to-peer) sales model
Somon.tj	Tajikistan	Developing platform	Flexible adaptation to the local market
Arena.Xspace	Kyrgyzstan	Export-oriented	Attracting small and medium-sized enterprises

The table demonstrates the diverse development models and competitive strengths of e-commerce platforms across Central Asia. Kaspi.kz and Uzum hold particularly strong positions, supported by the effective integration of e-commerce with financial services, flexible payment solutions, and broader digital ecosystems. Wildberries contributes significantly to the expansion of cross-border trade and wider market connectivity, while platforms such as Mechta.kz, Asaxiy.uz, Somon.tj, and Arena.Xspace play an important role in serving local markets and responding to the needs of specific consumer segments.

Overall, the findings highlight the dynamic and complementary structure of the Central Asian e-commerce market. Platform integration, digital payment solutions, efficient logistics, customer-oriented services, and access to cross-border markets are emerging as key factors that strengthen competitiveness and create favorable conditions for the further expansion of the regional digital economy.

Table 3.
E-commerce market growth forecasts in Central Asia (CAGR: 25–30%).

Period	Regional Forecast (USD billion)	Kazakhstan (USD billion)	Kyrgyzstan (USD million)	Tajikistan (USD million)	Turkmenistan (USD million)	Uzbekistan (USD billion)
Next 5 Years (2030)	50–70	15–20	600	30–40	500–600	2–3
Next 10 Years (2035)	100–150	30–40	1,000	50–70	800–1,000	5–7
Next 15 Years (2040)	200+	50+	1,500+	100+	1,200+	10+

In particular, the e-commerce market size of Central Asian countries in 2023–2024 was used as the initial baseline for the forecasting process. Based on these baseline values, future growth trajectories were modeled using a compound annual growth rate (CAGR) ranging from 25% to 30%. This range reflects the positive expansion trends observed in international e-commerce markets, particularly in developing economies, and provides a reasonable basis for assessing the region's future growth potential.

The forecasting process also incorporated key structural determinants, including the level of digital infrastructure, Internet penetration, logistics development, the adoption of electronic payment systems, and government policies supporting the digital economy in each country. In addition, comparative benchmarking was conducted against the e-commerce growth experience of other developing regions, particularly Southeast Asia and Eastern Europe, in order to strengthen the analytical foundation of the forecast and identify potential development pathways for Central Asia.

CONCLUSION AND SUGGESTIONS

The research findings indicate that the e-commerce market in Central Asian countries is developing steadily and becoming an increasingly important component of the regional digital economy. The expansion of Internet access, widespread use of smartphones, continued development of electronic payment systems, and evolving consumer behaviour are creating favourable conditions for the sustainable growth of online trade. Kazakhstan and Uzbekistan are among the leading participants in the regional e-commerce market, supported by their relatively large consumer markets, expanding digital ecosystems, and improving digital infrastructure.

The analysis shows that mobile commerce plays a particularly important role in regional e-commerce development, as a significant proportion of consumers use smartphones to search for products, compare prices, make payments, and place online orders. At the same time, the expansion of cross-border e-commerce is creating broader access to international marketplaces and strengthening the integration of Central Asian countries into global digital trade. This process provides new opportunities for local businesses, particularly small and medium-sized enterprises, to enter foreign markets, diversify their sales channels, and broaden their customer base.

The current stage of e-commerce development also demonstrates substantial potential for further expansion across the region. Continued improvements in logistics and delivery infrastructure, wider Internet coverage, greater transport efficiency, and a growing share of e-commerce in total retail trade can create additional opportunities for market development. These areas are particularly important for extending the benefits of digital commerce beyond major urban centres and supporting more balanced e-commerce growth across Central Asian countries.

Therefore, the further development of e-commerce in Central Asia can be supported through continued investment in digital and logistics infrastructure, wider adoption of electronic payment systems, stronger consumer protection mechanisms, improved digital literacy, and more efficient cross-border trade procedures. Progress in these areas can increase domestic online trade, strengthen regional economic integration, expand opportunities for local enterprises, and enhance the competitiveness of Central Asian businesses in international e-commerce markets.

Overall, the combination of favourable demographic trends, expanding digital connectivity, growing mobile commerce, improving payment systems, and stronger cross-border trade links provides a solid foundation for the long-term and sustainable development of e-commerce in Central Asia.

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