

A Passage to Thailand: The Current Logistics System in Thailand's Aggregate MICE Industry

En Route

A comprehensive and well-functioning logistics system is generally acknowledged as an integral part in the development full-fledge MICE industries across the board. In this report, we shall attempt to deliberate upon the following set of components: 1) the definition of MICE logistics, 2) setting the current economic scene for Thailand's MICE logistics, 3) the current logistic system in Thailand's aggregate MICE industry', and 4) the way forward.

1. The Definition of MICE Logistics

Logistics: Definition

For the purposes of our discussion, logistics is defined as the process, practice and administration of the effective and efficient flow of resources from origin to destination and/or the point of consumption in order to satisfy certain human economic requirements.¹ In the normal course of professional practices, the logistics of physical items necessitates the integration of material handling, production, packaging, [intermodal/multimodal] transportation, information flows, inventory and warehousing standards, and could as well include security-related practices, all of which reflect the current international heterogeneity of economic situations. The optimal minimization/optimization of the use of economic resources is a common requirement/ motivation/incentive across the board. Logistics management helps firms and parties concerned reduce expenses, and significantly enhance customer service.² A subject as complex and comprehensive as logistics naturally comprise a variety of sub-operations and sub-fields.³

¹ Logistics in the true sense of the word incorporates the integrated planning, control/tracking, implementation, and monitoring/surveillance of all internal and network-wide components and linkages, material, parts, and product flows, including the essential two-way and multimodal information flows, industrial and trading enterprises along the entire value-added chain, as well as product life cycle so as to comply with customers' needs and requirements in a bid to reflect the changing characteristics of economic activities, such as the proliferation of the range, as well as product diversification and differentiation. This is a theoretical expansion, for the purposes of this paper, of the definition originally postulated by the Council of Logistics Management [CLM]. The Council has now become the Council of Supply Chain Management Professionals (CSCMP) to reflect the changing needs of its members and the profession [effective January 1, 2005]. Human resources in the profession now have an expanded and more critical role within logistics organizations than they previously did. The Council has become more inclusive to others that play important roles in the supply chain [see Material Handling & Logistics, <http://mhlnews.com/global-supply-chain/council-logistics-management-become-council-supply-chain-management-professional>; MICE Logistics, <http://www.86mice.com/Logistics.html>;

Vincenzo Presutto, <http://www.slideshare.net/presutto/the-logistics-system>; Wikipedia, <http://en.wikipedia.org/wiki/Logistics>, and Charungkiat Phutiratana, Conference Logistics, Unpublished Lecture Notes Series, 2013].

² See Technopedia, <http://www.techopedia.com/definition/13984/logistics-management>, and Pedro S. Hurtado, <http://www.sbaer.uca.edu/research/sribr/1999/05.pdf>.

³ Sub-areas under the logistics heading include the following: procurement logistics, production logistics, distribution logistics, RAM logistics, after-sales logistics, reverse logistics, concierge service, disposal logistics, green logistics, global logistics, and domestic logistics [see Pedro S. Hurtado, *ibid*, and Wikipedia, *ibid*].

MICE Logistics: Definition

As such MICE logistics may be defined as *“the process, practice and administration of the effective and efficient flow of resources between the points of MICE-related product origin involving functional products/resources suppliers and the MICE implementation/consumption/destination in question so order to satisfy specific practical requirements.”* MICE logistics incorporates the integrated planning, control/tracking, implementation, and monitoring/surveillance of all internal and network-wide material, parts, and product flows, including the necessary information flow along the entire value-added chain, and product life cycle so as to comply with MICE customers’ needs and requirements. MICE logistics would normally involves, the logistics of physical items, and necessitates the integration of material handling, production, packaging, transportation, inventory, information flow, on-site/venue operation and warehousing for the purposes of MICE activity implementation, while aiming to minimize the use of resources as efficiently and appropriately as practical.⁴

2. Setting the Current Economic Scene for Thailand’s MICE Logistics

2.1) Macro-Economic Perspectives

Recent developments in Asia and the Pacific point positively to contributing macro-economic forces at work in the region’s different MICE sectors as follows:

- 2.1.1) Asia’s economic resilience and increasing relative economic size with tourism demand is expected to grow by 4%,⁵
- 2.1.2) The advent of the 10-nation AEC in late 2015 is forecast to substantially increase employment and investment opportunities with tremendous bearing on MICE industries. The AEC has combined markets of over 600 million people, a more liberalized labour market, improved work conditions, as well as a region endowed with natural resources. It also encompasses marine and air logistic hubs connecting the Middle East, the Indian Sub-continent, East Asia, and the Oceania; and
- 2.1.3) Proactive investment projects in MICE logistics infrastructure in ASEAN and nearby locations add to the region’s attractiveness and readiness and intensify the competitive momentum: e.g. the expansion of Jakarta’s Soekarno–Hatta International Airport, the planned construction of Vietnam’s Long Thanh Airport, and the expansion of South Korea’s Incheon Airport and Hong Kong International Airport.

2.2) Micro-Economic Perspectives:

Key Insights for Business Travel

Against the backdrop of the current economic challenges, Asian firms are still constantly maximizing benefits of business travel for growth prospects and strengthening long-term strategic relationships. Demand for business travel in the Asia and the Pacific region is expected to rise consistently. Asia’s largest firms expect to spend more on business travel in 2013. Simultaneously, further demand from businesses across the globe will increase as they will be sending employees to APAC to capitalize on the region’s economic expansion.⁶ As such, corporate travel

⁴ See Charungkiat Phutiratana, *ibid*, Wikipedia, *ibid*, and MICE Logistics, *ibid*.

⁵ Global Travel Trends 2011/12, IPK International 2012.

⁶ WTTC and Oxford Economics, quoted in Radius, *ibid*.

management practices will respond accordingly. Specifically, Asian businesses are less concerned over travel in relation to the setting of business travel policies.⁷ Firms are recognizing and considering evolving trends in technologies and product offerings. For example, the airlines sector will be restructured to strike a balance among full-service airlines, hybrid, LCC, and multi-brand airlines.

Key Insights for the MICE Sector

The Region's MICE players are recognizing the significance of strategic MICE management. Major figures all point to strong growth and a firm foundation for the region's MICE sector: 1) MICE expenses are projected to increase from 6% to 8% for 2013 (Industry had 6.7% CAGR since 2003); 2) advance bookings for 2013 had increased by 5% to 6%; and 3) the average cost per attendee per day is projected to increase by 5% to 8%.⁸ Approximately 70% to 75% of meetings are being held domestically. In this regard, it is to be noted that MICE spending is one of the least transparent spend categories, and as much as 35% of travel expenses is dedicated to MICE activities. Current challenges in the MICE sector include the following: 1) finding the synergies between business travel and MICE for further cost savings and better management controls; 2) overcoming fragmentation and decentralized data sources; and 3) consolidating data to improve negotiation with suppliers (such as airfares, hotels, and car rental).⁹

3. The Current Logistics System in Thailand's Aggregate MICE industry

The current logistic system in Thailand's aggregate MICE industry comprises a variety of major integral components, including: 3.1) ports and airports, 3.2) authorities concerned, 3.3) airlines, 3.4) freight shipping companies, 3.5) and freight forwarders.

3.1) Ports and Airports

Ports and airports constitute the main integral components of any intermodal/multimodal system. Idealistically, they are also selected to suit the intermodal/multimodal communications and transportation network of the country in question. Thailand has a great number of seaports developed to different degrees along the country's coastlines.¹⁰ The country's most important ports are Laem Chabang Port, and Bangkok [Khlong Toey] Port, which are administered by the Port Authority of Thailand [PAT]. In the main PAT operates in parallel with its administrative partner entity for administrative purposes as is most evident in the case of Laem Chabang Port¹¹ in the country's Eastern region.

Meanwhile, Thailand is a major aviation hub in ASEAN. At present, the country has a total of no fewer than 63 airports and airstrips of different sizes and capacity levels,¹² 12 of which are international airports.¹³ A particularly

⁷ It is to be noted as well that most are relatively new to corporate travel management. Also, few have centralized travel policy. See Radius, *ibid*.

⁸ See Radius, *ibid*.

⁹ See Radius, *ibid*.

¹⁰ Sea-Rates.com presents Thailand's currently listed 24 seaports. Meanwhile Maritime-Database.com puts the total number at 33. See <http://www.maritime-database.com/port.php?pid=5396> for comparative purposes.

¹¹ Thailand Convention and Exhibition Bureau [TCEB], Introduction to the MICE Industry [in Thai], p.281.

¹² See Heritage Research Division, MICE Reference Research Series, 2013].

important entity in the country's aviation industry is Airports of Thailand Public Company Limited, which is a large public company operating Thailand's 6 most important international airports from its headquarters in Don Mueang, Bangkok. The 6 AOT-operated international airports are as follows: Suvarnabhumi International Airport, Don Mueang International Airport, Phuket International Airport, Chiang Mai International Airport, Hat Yai International Airport, and Mae Fah Luang - Chiang Rai International Airport.¹⁴

3.2) Authorities Concerned

As might be readily envisaged, the logistics system in any country's aggregate MICE industry involves a great variety of public entities. In the case of Thailand's MICE sector, the following public bodies have been identified as particularly relevant: 1) the Immigration Bureau, 2) the Customs Department, 3) the Excise Department, 4) the Food and Drug Administration, 5) Thailand Industrial Standard Institute [TISI], 6) the Office of Agriculture Regulation, and 7) the Office of the National Broadcasting and Telecommunications Commission [NBTC].¹⁵ Meanwhile, the Customs Department and the Excise Department are in charge of taxation and excise administration respectively. The remaining public authorities listed above deal with the authorization and verification of the quality and legality of each specific line of goods and products which are of particular relevance to MICE organizers and parties concerned. These authorities are located across the countries.

3.3) Airlines

At present, a great number of airlines serve Thailand and international destinations, principally at Suvarnabhumi Airport. As of May, 2013, 92 airlines serve this airport, connecting Bangkok to over 132 destinations [14 domestic destinations and 118 international destinations].¹⁶ In addition, no fewer than 8 charter flight operators provide services to and from Suvarnabhumi.¹⁷ Meanwhile no fewer than 28 cargo [airlines] entrepreneurs are operational at Suvarnabhumi Airport.¹⁸

¹³ Thailand's current international aviation are as follows: Don Mueang International Airport, Suvarnabhumi Airport, Chiang Mai International Airport, Mae Fah Luang-Chiang Rai International Airport, Hat Yai International Airport, Samui international airport, Krabi Airport, Phuket International Airport, U-Tapao International Airport (U-Taphao), Surat Thani Airport, Ubon Ratchathani Airport, Udon Thani International Airport, [see Heritage Research Division, *ibid*].

¹⁴ Airports of Thailand Public Company Limited, <http://www.airportthai.co.th/en/home.php>

¹⁵ Thailand Convention and Exhibition Bureau [TCEB], Introduction to the MICE Industry [in Thai], *ibid*.

¹⁶ See <http://www.thailandairlinetimetable.com/>, Aéroport Suvarnabhumi de Bangkok

¹⁷ These operators are Air Finland, Air Italy Polska, Fin Air, Fly LaL Chartered, North Wind, Travel Service, TUI Fly Nordic, and Smart Link Airlines, see Heritage Research Division, *ibid*,

¹⁸ Cargo operators at Suvarnabhumi Airport are Air France Cargo, Air Hong Kong, ANA Cargo, Asiana Cargo, Cardig Air, Cargolux, Cathay Pacific Cargo, China Airlines Cargo, China Cargo Airlines, DHL Aviation operated by AeroLogic, EVA Air Cargo, FedEx Express, Jett8 Airlines Cargo, K-Mile Air, Korean Air Cargo, Lufthansa Cargo, Martinair-KLM, MASKargo, Nippon Cargo Airlines, Saudia Cargo, Singapore Airlines Cargo, Thai Airways International, Tri-MG Intra Asia Airlines, Turkish Airlines Cargo, ULS Airlines Cargo, UPS Airlines, Yanda Airlines, and Yangtze River Express, see Heritage Research Division, *ibid*,



3.4) Freight Shipping Companies

If MICE goods are too large or heavy to use parcel shipping, commercial freight shipping is the main international transportation mode. Freight haulers offer several options, including less than truckload freight, truckload freight, and expedited freight services. In choosing a freight hauler or a freight broker, it is recommended to verify their authority, insurance, and references. It is to be noted, however, unlike parcel shipping companies, freight haulers are not responsible for packing, loading, or unloading MICE shipment. The chosen carrier may be able to assist, but it is MICE organizers' responsibility to handle their own freight at the origin and destination points.¹⁹

Freight shipping companies are specialized in sea freight transportation. In the main, most of these companies own freighters with definite established navigation schedules. They normally utilize standard containers for ease of handling and further operation during intermodal/multimodal transfers [e.g. twenty-foot equivalent units: TEU]. In Thailand, a variety of freight shipping companies are in operation to cater for different requirements. However, the majority of these companies are foreign subsidiaries.²⁰ As of 2013, 44 freight shipping companies are present in Thailand's Lam Chabang Port, the country's biggest seaport.²¹

3.5) Freight Forwarders

A freight forwarder is an agent who operates on behalf of importers, exporters or other firms or individuals to organise the safe, cost-effective, and efficient transportation of goods. Freight forwarders make necessary arrangements to secure the best means of transport, taking into consideration the type of goods/products and the customers' delivery requirements, utilizing the services of airlines, freight shipping lines, as well as rail and road freight operators, or even its own transportation services.²² In the main, a freight forwarder, the 'Architect of Transport', acts as an expert in supply chain management. Normally, MICE organizers opt for services provided by freight forwarders in certain parts of their MICE implementation related to long-haul goods and products handling required. As of 2013, there are 999 company members of the Customs Brokers and Transportation Association of Thailand (CTAT) [803 members in the Central Region, 78 members in the Southern Region, 49 members in the Eastern Region, 43 members in the Northern Region, and 25 members in the Northeastern Region].²³

4. The Way Forward: In Paths Untrodden

An Improved Passage to Thailand

The international MICE sector is exhibiting its own intrinsic strength with positive signs of growth in MICE activities and investment projects, specifically in regard to Asia and the Pacific. With special reference to Thailand, empirical evidence proves particularly useful: 1) the recent world recession did have certain bearing on Thailand's in terms of

¹⁹ See <http://www.uship.com/freight>.

²⁰ TCEB, *ibid*, [in Thai].

²¹ Freight forwarders vary in size and type, from those operating on a national and international basis to smaller, more specialised enterprises dealing with particular types of goods or operate within specific geographical areas, see

http://www.laemchabangport.com/index.php?option=com_content&view=article&id=188&Itemid=108&lang=th

²² See Prospects, http://www.prospects.ac.uk/freight_forwarder_job_description.htm.

²³ the Customs Brokers and Transportation Association of Thailand (CTAT)

the number of incoming MICE travelers; 2) the global MICE sector has shown healthy recovery signs, and 3) the Asian market has proved essential in the growth and sustainability of the Thai MICE industry. It is strategically important to attract different sub-sectors of the global market essentially in line with the portfolio investment structure in order to be on the safe side.²⁴

What are the potential implications of these developments for Thailand's MICE logistics system? In light of an increasingly full-fledged industrial setting with rising new entrants including Vietnam and Indonesia, as well as such current high-flyer powers as Hong Kong, China, and Singapore gloriously crowned with their past historic laurels, the only rational policy line for Thailand's MICE entrepreneurs and parties concerned consists in **regular endogenous improvement**.

We have identified the following six aspects as possible steps towards sustainability for Thailand's MICE logistics system: **1) high-productivity logistics investment; 2) linkage enhancement; 3) software-capacity building; 4) connecting Thailand's missing MICE links; 5) 'green logistics', 'green meetings' and 'event green', and 6) building up the authorities' prowess.**

1) High-productivity logistics investment

High-productivity logistics investment with their associated positive economic multipliers could well take Thailand from strength to strength. This could take the form of any cost-effective investment projects which enhance linkages connecting diverse socio-economic activities to the trickle-down effect across the country's socio-spatial milieu, or any industrial processing complexes and real estate projects near seaports and/or along the borders which would further induced MICE activities. Examples of constructive investments for MICE logistics improvement include:

- 1.1) The second phase of Suvarnabhumi Airport has been set in motion, and should be completed by 2017. AOT kick started its Suvarnabhumi's second development phase last year, signing a project management contract, with the project due for completion in 2017. The second phase comprises a 216,000 sqm satellite terminal with 28 aerobridges and aprons; a tunnel and mass transport system connecting the main and the satellite buildings; eastward extension of the main terminal; airline offices and parking buildings and supporting infrastructure. Upon its completion, Suvarnabhumi's handling capacity at the airport will be raised to 60 million passengers per year [from the current figure of 45 million]. In the master plan, Suvarnabhumi Airport has five development phases that will ultimately give it a capacity of 120 million passengers a year and four runways. A train system has also been planned to connect Don Mueang Airport and Suvarnabhumi Airport through the Makkasan's Airport Link Station.
- 1.2) In an attempt to ease overcrowding, AOT has approved the Phuket International Airport expansion program, involving THB5.8 billion [\$188 million]. This plan is expected to double the number of passengers from 6.5 million to 12.5 million per annum. The project will add 10 more aircraft bays, bringing the number to 25, and another four passenger boarding gantries, to a total of 11. The first phase of the

²⁴ The IP&C Statistics Report reveals a series of clear pictures: 1) in aggregate, the country's MICE sector has been performing relatively steadily between year 2006 and year 2011 in terms of the number of incoming MICE traveler, moving within a certain narrow range with slight downward and upward trends. 2010 and 2012 represented considerable rebound rates, with 2012 depicting a decisively clear gain for the industry in comparison to the start year in this scrutiny [2006]; 2) years with a downward trend in the main reflect the then effect of the world economic recession. However, Thailand's MICE sector was quick to rebound in 2010 and 2012, practically cancelled out the downward trend experienced in 2008 and 2009, and 2011, and 3) the true engine of growth in this scenario is the Asian MICE travelers, who have kept the Thai MICE's international balance in shape and even growing in recent years. These results are analyzed by Heritage Research Division.

expansion, planned to take approximately one year, will see the construction of a new international terminal.²⁵The temporary terminal will be constructed on one floor measuring 4,000-5,000 square meters. There will also be added check-in counters and two areas of approximately 1,000 sqm as AOT office space. Upon the completion of the second phase, the five aircraft bays will be ready to handle additional passengers during the high season.

- 1.3) The construction of international airport and cargo hubs in the true sense of the word at U-Tapao Airport, and Kamphaeng Saen Airport in Nakhon Pathom Province could readily serve one of Thailand's sizeable urban agglomerations throughout the eastern region and western region respectively. The first aviation hub site would integrate all forms of economic activities, including world-famous coastal resorts, and major industrial estates along the eastern coast and further inland into regions within a 250-km radius, including Khao Yai National Park – a World Heritage site. Its service coverage would also span the border to cover the western provinces of Cambodia.

Meanwhile, the Kamphaeng Saen project, which would require significantly low budget outlays on account of its relatively high elevation level, would effectively serve Thailand's western provinces, and such major coastal resorts as Hua Hin and Cha-am. It could also play a pivotal role, functioning as an international link to the forthcoming Tavoy industrial complex in Myanmar. If such aviation facilities were actually put in place, these modernized and expanded airports would literally enhance the country's MICE standing significantly.

The service coverage of both airports would also help to alleviate the current pressure on Suvarnabhumi Airport. Collectively, Bangkok's four airports network [Suvarnabhumi, Don Muang, U-Tapao, and Kamphaeng Saen] would enable the capital metropolis to be on a par with London as one of the world's leading aviation centres.

2) Linkage enhancement

Of particular interest for our purposes here are 2 types of linkages: i.e. 2.1) intermodal linkages, and 2.2) venue-transportation linkages.

2.1) Intermodal linkages Linkage

For major international MICE events, efficient and comprehensive intermodal connectivity is a must, which can determine the success level thereof. Accordingly, efforts to enhance this connectivity are always a welcome move. In the case of Thailand's MICE, a prime example is the construction of an international airport and cargo hub at U-Tapao Airport and the Eastern line high-speed train. These mega-projects will effectively contribute to the establishment of a tremendous comprehensive intermodal/multimodal configuration, forging world-class connectivity with the world over. Brief details of this potential connectivity enhancement case are as follows:

2.1.1) Air connectivity

With the expansion of U-Tapao airport facilities, it is possible to achieve air connectivity, connecting Thailand's Eastern Seaboard to any aviation centre within the country, ASEAN, and the world over. In this framework, one could readily envisage a variety of connectivity, including a very innovative form of connectivity, linking 4 of Thailand's major seaside resort town/cities across the Gulf of Thailand and the Andaman Coast with their MICE facilities and venues [Pattaya,

²⁵ Air Transport World, <http://atwonline.com/airports-amp-routes/phuket-airport-expansion-work-begins>

Hua Hin, Samui, and Phuket]. All of these coastal resort centers can be reached through their respective airports.²⁶

2.1.2) Sea connectivity

Laem Chabang²⁷ Port, one of the world's top 20 seaports in terms of cargo handling, serves as the country's major port. With regard to MICE activities, this port readily serves even major world-scale events. As such, the construction of further MICE venues and exposition sites could be effectively planned and implemented if necessarily without any long-haul merchandise and equipment transportation constraints. In this regard, efficient rail and road transportation routes will prove vital for MICE events within the Eastern Region or Bangkok in this intermodal configuration.

2.1.3) Land connectivity

Taken together, the combined transportation investment projects can connect all the major transportation modes and facilities through rail and road modes: i.e. Laem Chabang deep-sea port, the country's biggest naval base, Bangkok's Suvarnabhumi Airport, U-Tapao Airport, as well as the already existing land transportation system [which could still be improved further when required]. This intermodal network could well be regarded as a world-class transportation grid, providing further connectivity to Bangkok and Myanmar to the West, Cambodia to the East, as well as Thailand's Northern and Northeastern regions as appropriate.

Of particular interest in this land connectivity discussion is the 'high speed train development project' with Bangkok as the main terminal for all routes on account of its centrality. Four routes have been planned from Bangkok to the North [Chiang Mai]; the North East [Nong Khai and Ubon Ratchathan], the East [Chanthaburi and Aranyaprathet], and the South (Padang Besar), the last of which to be completed in the ultimate plan for the year 2032. A demand analysis has suggested that in 2017 the ridership of high speed train across all routes would be as high as 153,000 trips per day very much in the same vein as the current ordinary train service.²⁸ This high-speed rail network will also connect Thailand to its immediate neighbouring countries and China, serving as a platform for further MICE connectivity and beyond within the AEC milieu.

2.2) Venue-transportation linkages

A very innovative and cost-effective way is **a combination of MICE venues/sites with long-haul transportation modes, and intra-city transportation systems**. A variety of points could be put forward for deliberation.

- In terms of long-haul transportation modes, aviation transportation possibilities are of particular interest for both international and domestic travel.
- Improved road and rail networks are also capable of significantly enhancing intra-Thailand and intra-ASEAN [and with-Southern China] connectivity.
- At present, virtually all of Thailand's major MICE venues are located in cities/towns served by international airports and domestic airports: i.e. Bangkok, Chiang Mai, Pattaya, Phuket, Samui, and Hatyai. However, all of these airports still need further expansions and improvements to cope with increasing amounts of air traffic and numbers of inbound MICE delegates.

²⁶ Admittedly, all the four airports have been developed to different degrees as yet, with Phuket International Airport as the most developed aviation facility and Hua Hin Airport as the least developed one.

²⁷ See Sumalee Sukhdanon, Laem Chabang Port, <http://www.tri.chula.ac.th/triresearch/learnchabang/learnchabang.html>]

²⁸ See <http://www.sepo.go.th/highspeedrail/download/HSR%20Inform.pdf>.

- Hua Hin, another major MICE venue city, has not had access to a major airport as yet. Its Bo Fai Airport is in need of speedy improvements and expansions to further enhance Hua Hin's tremendous potential as a high-end seaside resort station and a MICE centre.
- All of these Thai MICE cities are still capable of containing more MICE venues and sites to accommodate more MICE demand when such considerations as Thailand's standing and potential global tourism and MICE industries are taken into account. Of course, all these efforts need to be complemented with publicity and marketing campaigns as well as world-class intermodal facilities. Apparently, all these arrangements and configurations are interrelated and mutually reinforcing in their nature. In fact, certain cities – Bangkok and Pattaya – could well add world-scale MICE facilities and infrastructure to their bastions of resources with well-planned and well-delivered implementation anytime as from now to in order forge ahead on the world's MICE map.
- A great number of additional Thai MICE cities may be incorporated into the country's national MICE framework on account of such factors as Thailand's geographical centrality vintage point within the upper SEA, its proximity to two oceans, and the advent of the upcoming AEC. Such potential MICE cities include Chiang Rai, Mae Sot, Phitsanulok, Nong Khai, Ubon Ratchathani, Khon Khaen, and Nakhon Ratchasima. This list could even include such far-flung towns as Betong and Sungai Kolok in the far South of the country due to their sizeable human settlements, reasonably developed infrastructure and their proximity to Northern Malaysia. Of course, all of these require different levels of investment and differing strategic approaches as appropriate to serve context-specific purposes.
- Intra-city transportation mode improvements are urgently needed. The two most readily feasible options are enhanced mini-bus routes and taxi services. These services must be rendered modern, convenient, reasonably priced, adequately frequent and reliable, with certain additional amenities and, possibly, extras support arrangements such as digital map availability and language-support telephone lines, etc. Certain major cities, say, Chiang Mai and Hat Yai, could as well deliberate upon providing other forms of cost-effective as well as culturally and environmentally friendly mass transit systems such as light monorail lines connecting airports, bus terminals, train stations, and tourist places, etc.

3) software-capacity building;

What we have discussed up to now involves physical hard-ware capital investment. As closely linked to the concept of MICE logistics are software-capacity requirements across the board. Here we shall look at three sub-fields of software capacity building: 3.1) MICE professionals training; 3.2) linguistic professional education; and 3.3) data, statistics and IT training.

3.1) MICE professionals training

Singapore, one of Asia's top convention destinations, has set forth specialized professional training and personnel development as its top priority policy in a bid to create a pool of top-class professional exhibition organizers (PEOs), professional conference organizers (PCOs), and destination management companies (DMCs).²⁹ If Thailand, an emerging regional MICE hub, aims to stand out as an ideal world-class MICE superpower, it will need to provide quality training for diverse pools of (PCOs), professional exhibition organizers (PEOs), and destination management companies (DMCs).

3.2) linguistic professional education

Additionally, the country also needs to produce top-quality consecutive and simultaneous interpreters capable of catering for the needs of the MICE sector across a whole range of 1) 6 UN official languages, 2)

²⁹ TCEB, MICE Movement in Asia, p. 47, (publication year not specified).

9 SEA national languages [Thai, Cambodian, Indonesian, Lao, Malay, Mandarin, Myanmar, Tagalog, and Vietnamese,] 3) the remaining languages of the top 20 economic powerhouses [G 20], and 4) the remaining languages of the 20 most populous nations. This will effectively provide a significant practical competitive edge. Additionally, a serious global MICE hub will also have to provide semantic and specialized linguistic training for specialized areas.³⁰ As the training of any proper top-quality interpreter takes a relatively extended period of time.³¹ Accordingly, a country will inevitably need a long-term plan for linguistic and other relevant capacity-building schemes. It is to be noted that Thailand could even aim to become a linguistic training centre for the entire Region, a separate sector in its own right, on account of its thriving MICE industries and its cost competitiveness.

3.3) Data, statistics and IT training

The development of data and statistical management as well as IT capabilities empirically proves essential in the MICE industries. Ideally, data and processed statistical information must be adequately comprehensive, regularly updated, classified in a user-friendly manner, and strategically presented to cater for administrative and managerial objectives as well as niche marketing practices effectively. Relevant and specific data and information can be acquired directly from the consistently well-developed ICCA database on the international comparative rankings of nations and cities as convention destinations, on the foundation of its rigid and concise definition of 'international convention', which puts the country as Asia's no. 9 destination. It is commendable that the country should develop its proper databases to cover other types of international conventions not falling within the scope of the ICCA definition. This practice will more accurately represent a more balanced and realistic picture of MICE contributions to the Thai economy, a point particularly relevant as a great number of the programme-based workshop, meetings, and seminar series organized by numerous Thailand-based international entities over the course of several years in Thailand do not qualify as international conventions there-under.

Meanwhile, IT capabilities consistently provide support across the board to the MICE industries with respect to marketing, project implementation, evaluation, forecasting, and many others. One aspect of IT utilization involves public relations efficiency as a key element in ensuring success for MICE activities may prove successful. A prime example is the regular email-based English communications for China's Canton Fair liaison activities. In this regard, Hong Kong's strategy shares the same degree of enthusiasm. With its large expatriate multicultural communities, what Thailand can virtually immediately pursue in this connection is the implementation of a combination of communications technology applications and a language policy to enhance its MICE industries. Tailored web-based contents and regular emailing through a selected language gamut should take this purpose one step further. Accordingly, in order for Thailand to be on a par with the leaders, and remain competitive at the global level, it should step up its efforts to create crème-de-la-crème pools of IT personnel for all MICE purposes as soon as possible.

³⁰ The existence of a vast pool of interpreters and translators across the most frequently used languages, together with advanced economic and logistic services, *inter alia*, have made Germany Europe's top convention destination. Likewise, across Guang Dong Province in China, great numbers of students were trained at tertiary institutions to serve at the Canton Fair, Asia's largest tradeshow. See Charungkiat Phutiratana, Conference Interpretation, Unpublished Lecture Notes Series, pp. 18-22, (2010)

³¹ Charungkiat Phutiratana, *ibid*.



4) Connecting Thailand's Missing MICE Links

A country's missing links present tremendous challenges to its MICE capability and potential, both quantitatively and qualitatively. Certain major strategic developments have also taken place, while there is still substantial room for improvement in Thailand's aviation operators, routes and coordination.

- 1) As for positive developments, THAI's strategic response – the incorporation of its Thai Smile Air – to serve the market gap between low-cost carriers and full service airlines as a hybrid operator is a welcome move. After the launch of its first international flight to Macau on 7 July, 2012, it has now operated its international flights to 7 Asian cities: Ahmedabad, Colombo, Delhi, Kuala Lumpur, Macau, Mandalay, and Mumbai,³² Further international destinations planned for the 4th quarter of 2013 are Laos' Luang Prabang and Vientiane, as well as China's Changsha and Chongqing.³³ If THAI Smile's expansion continues to grow at this rate it could take the company approximately another 5 to 10 years to be on a par with Silk Air, depending as well on the latter's development pace. Only then can THAI Smile truly join the major regional aviation operators' club. That is also when the company can effectively contribute to the country's MICE sector.

Thai Smile's upcoming expansion is purely international. It is also expanding into longer medium-haul routes, necessitating an adjustment in its product that will result in the carrier moving further upmarket and closer to the full-service model. The launch of flights to India increase the necessity of a true business class product, similar to what is offered by SilkAir [Singapore Airlines' regional subsidiary], and Dragonair [Cathy Pacific's regional subsidiary]. The India flights are about four hours, making a product which is sufficient for short domestic flights unattractive. Thai Smile will evolve more into a full-service regional carrier with the fixed business class cabin. Yet, THAI Smile will still retain certain elements of the LCC or hybrid model and have a lower cost structure than THAI. The lower cost structure is crucial as THAI looks to fend off LCC competition domestically and on short-haul international routes. Nevertheless, on its new medium-haul routes to India there is no competition, and the focus should rather be on providing a service close to that provided by THAI.

One point needs to be taken into consideration: an industrial analyst has postulated that as far as short-haul point-to-point routes are concerned, THAI Smile may not be the best operational option. With Thai Smile moving upmarket, THAI might be better off using Nok or re-looking at establishing a new international LCC for markets such as Phuket-Kuala Lumpur. Nok could also potentially be a better alternative to THAI Smile for point-to-point domestic routes such as Phuket-Chiang Mai. Nok in early 2013 launched a Hat Yai-Chiang Mai service, which is also served by Thai AirAsia. Thai AirAsia has had success opening up new point-to-point routes such as Phuket to Udon Thani. The Thai Airways Group is interested in competing in these types of domestic markets, as well as point-to-point international markets from Phuket, Krabi and Chiang Mai but would be better off using a true LCC. THAI Smile should emerge as an effective tool to open new destinations and supplement THAI in existing destinations from Bangkok as it provides a lower cost base while maintaining a product that is sufficient for connecting passengers. However, most point-to-point routes bypassing Bangkok lack the high yielding connecting passengers, and have a much different mix of passengers that is not ideal for the regional full-service model. THAI Smile has settled on a full-service regional model, a smart move in that there is a void for such a carrier in the Thai Airways Group portfolio.

³² THAI Smile online reservations, <http://www.thaismileair.com>.

³³ The Bangkok-Luang Prabang route service is scheduled to be provided on 16 November, 2013, while the other 3 routes will be operated for the first time on 27 October 2013

However, it should adhere to the model completely as it is decidedly not low-cost, and is focusing on providing a seamless product to THAI passengers.³⁴

- 2) As for potential improvements, one such example is the fact that the country still has not provided access to the whole of South and Latin America [and certain other parts of the world] through Bangkok-based direct flight operations, thus substantially limiting its own MICE potential. On the contrary, Singapore Airlines [SIA Group]³⁵ specifically operates direct flights to Brazil's São Paulo. Meanwhile, its subsidiaries and affiliated companies, Silkair, Scoot, and Tiger Airways [its short-haul LCC affiliate] effectively serve regional destinations in the Asia and Pacific Region through their lower cost flight operations. Collectively, the 4 carriers, in their respective markets, significantly enhance Singapore's standing as Asia's number 1. international convention destination and a major exhibition hub.³⁶

Thailand should deliberate upon operating direct flights to São Paulo, the largest city in the southern hemisphere and the Americas. This project could be implemented in cooperation with a Brazilian airlines operator to save operational costs, or even engage a three-nation arrangement, involving a third country in either directions [Africa or the Pacific] to enhance connectivity and potential profitability. In addition, the Thai government could well apply social CBA as profitability on this route could rationally be based on calculation founded on socio-economic points of view. Subsequently, MICE and business players could follow suit by making their constructive and innovative contributions as appropriate, as the primary beneficiaries thereof.³⁷ Thailand's vertical axial connection would then be extended further into the Southern hemisphere. This move would firmly enhance the country's status as a global MICE destination in the true sense of the word. Additionally, it is to be noted that in order to get closer to SIA's overall position, Thailand's passenger aviation operators will need to find ways to forge closer links among all the top 4 Thai airlines and major cargo operators. Further proactive and imaginative operations should achieve collective synergy in MICE-related air logistics with respect to the number of routes and passengers served as Team Thailand over the next decade.³⁸

Also relevant to our analysis in this regard, considering the increasing pressure levelled by potential LLC long-haul operations, industrial analyses even suggest that THAI should seriously deliberate on establishing a new carrier brand for the long-haul low-cost sector, very much in the same vein as Singapore Airlines' strategy, a major player in the industry, which has a 100% stake in Scoot and a 33% stake in short-haul LCC affiliate Tiger Airways. It has been argued that Nok, a THAI's affiliate, has a strong domestic brand, but lacks the international recognition to serve as a strong player in Thailand's inbound market. Meanwhile, Thai Smile is best off maintaining its regional focus following a similar model to SIA subsidiary SilkAir.³⁹

³⁴ Centre for Aviation, <http://centreforaviation.com/analysis/thai-smile-turns-attention-to-international-market-including-three-routes-to-india-100314>, *ibid*.

³⁵ The Group, comprising Singapore Airlines, Silkair and Singapore Airlines Cargo, is the world's largest airline and cargo group in terms of stock-market capitalization, having overtaking Southwest Airlines since 2006. http://fr.wikipedia.org/wiki/Singapore_Airlines

³⁶ It is to be noted that at least two airlines operators of two other Asian MICE powerhouses operate flights to São Paulo: Air China and Korean Air.

³⁷ If this model works as suggested, a similar project could be envisaged for Mexico City and Buenos Aires or other cities of the same standing.

³⁸ See Heritage Research Division, pp. 32-35, 2011, *ibid*.

³⁹ See Centre for Aviation, <http://centreforaviation.com/analysis/airasia-x-selection-of-bangkok-as-second-base-increases-pressure-on-thai-airways-104002>.

5) 'Green Logistics', 'green meetings' and 'event green'

In light of the recent environmental concerns, Thailand could take the lead, based on its natural resources and traditional wisdom richly developed within its varied tropical ecological milieus. The nation's current and prospective World Heritage sites, national wildlife, coastlines, and Thai ways of life could easily serve as stepping stones as MICE topics and MICE-related recreational attractions, encourage environmentally-conscious target groups and will contribute to collective action to champion common environmental and conservative causes. More specifically, the combined concept of **green meetings** and **event greening** is particularly relevance: both as a concrete form of action to safeguard the world and as a green marketing strategy.⁴⁰ Of particular interest is the concept and practice of 'green logistics', which represents a new perspective on logistics.

Logistics is the integrated management of all the activities required to transfer goods/products through the supply chain. For a typical product this supply chain extends from a raw material source through the production and distribution system to the point of consumption and the associated reverse logistics. The logistical activities comprise freight transport, storage, inventory management, materials handling and all the related information processing. The main objective of logistics is to co-ordinate these activities in a way that meets customer requirements at minimum cost. This cost has previously been defined in purely monetary terms. In light of rising concern for the environment, firms shall have to take more account of **the external costs of logistics** associated principally with climate change, air pollution, noise, vibration and accidents. Green logistics examines ways of reducing these externalities and achieving a more sustainable balance between economic, environmental and social objectives.⁴¹

The concept and practice of '**green logistics**' corroborates effectively with the concept and practice of 'green meeting'. The notion of green meeting proper refers to a meeting that is specifically designed and implemented in an optimal ways to minimize its environmental impacts and/or externalities in order to achieve sustainability throughout all of its components and involves all parties concerned in the meeting realization process. MICE events are considerably resource-intensive, and may exert negative environmental bearings on host locality and inhabitants. Therefore, the fundamental principles and rationales for the adjustment of MICE practices should become an integral micro-level component of the planning and implementation processes. Feasible examples of far-reaching and comprehensive international developments are Cape Town's green initiatives [comprising both the green event/event greening and green/smart living concepts],⁴² and the ILO Greener Business Asia Project.⁴³ Major international bodies supporting these interrelated notions include the US Environmental Protection Agency [EPA], the Green Meeting Industry Council [GMIC], International Association of Convention and Visitors Bureaus (IACVB), Meeting Professionals International (MPI). Business entities have also joined this positive environmental bandwagon

⁴⁰ The City of Cape Town, a major global tourist and MICE destination, is as prime example of how these concepts may be implemented efficiently. See the City of Cape Town, Smart Events Handbook: Greening guidelines for hosting sustainable events in Cape Town, First Edition, June 2010

⁴¹ See green logistics, <http://www.greenlogistics.org/>.

⁴² Cape Town as a major global tourist and MICE city has initiated and thoroughly developed the green event concept to better administer the organizing of major international events including the FIFA World Cup 2010. See City of Cape Town, Smart Living Handbook: Making Sustainable Living a Reality in Cape Town Homes, 4th Edition, May 2011,

http://www.capetown.gov.za/en/EnvironmentalResourceManagement/Documents/Smart_Living_Handbook_Eng_FULL%20VERSION_4thEd_2011-05.pdf

⁴³ ILO and its tripartite constituents and partners have creatively worked out the Greener Business Asia [GBA] Phases 1 and 2.

globally. Examples under this heading include Conference Venues Southern Africa [CONVEN], and CVENT [Online Solutions for Events and Surveys].⁴⁴

In our report entitled “Green Meetings Part 2: To the Lighthouse Beaconing [Coping with Environmental Impacts of Meetings]” A 3-step practical operational algorithm has been set forth for better and greener MICE events.⁴⁵ Apparently, **the elements particularly relevant to green logistics in the MICE industry are the green meeting notion involving MICE venues, eco-procurement arrangements, lodging/accommodation, and innovative and energy-efficient transportation arrangements.**

Several examples of green logistics are readily available. If one could resort to **‘synchronized MICE sequencing and grouping’** to achieve focus and attention, one could easily minimize parts of resource mobilization efforts, hence less resources spent thereupon. As MICE activities are in a state of flux, providing focus for international reference and business planning purposes could prove remarkably useful. For instance, the Canton Fair is a tremendous case in this connection. This international tradeshow is easily accessible information-wise and planning-wise. It is organized in April and October each year at the same colossal venue with a great multitude of producers and traders of the same or similar categories grouped into particular time slots for the sake of ease and convenience. Thai MICE components should seriously consider the pros and cons of this type of arrangement, which could readily economize on a great deal of resource mobilization on the part of MICE organizers, exhibitors, visitors, as well as logistics practitioners. In the same vein, a more comprehensive direct flight schedules provides greater comfort and lower externalities, while more low-cost operations offer both more attractive options for certain customer sections and lower environmental burdens. In a nutshell, the sky is the limit for feasible and innovative ways to achieve green logistics.

6) Building up the Authorities’ Prowess.

All the authorities concerned in MICE logistics, in particular the 7 authorities identified above⁴⁶ should be adequately provided with state-of-the-art technology, physical provisions, manpower, and pools of qualified staff. One example serves our purposes well here: an adequate number of immigration officers and stands should be stationed at major airports and other immigration checkpoints along the borders to minimize the time required for immigration procedures. Also, within this immigration workforce, it is recommended that all of them should be trained to speak English reasonably well, while a certain number of them should be able to speak other international and ASEAN languages for all the functional purposes. Simultaneously, they should be adequately provided with modern equipment and facilities as appropriate for their practices. Also, during any major MICE events, an adequate number of special immigration fast tracks should be arranged to facilitate immigration passage. Any such practice could enhance Thai authorities’ prowess as well as Thailand’s MICE standing and attractiveness substantially.

⁴⁴ See Green Meetings Part 2: To the Lighthouse Beaconing [Coping with Environmental Impacts of Meetings].

⁴⁵ See The City of Cape Town, Smart Events Handbook: Greening guidelines for hosting sustainable events in Cape Town, pp. 23-24 *ibid*. Also see Charungkiat Phutiratana, Green Meetings and Event Greening, Conference Interpretation, Unpublished Lecture Notes Series, 2011. For comparison purposes, see 10 Simple ways to green your meeting, see <http://www.conven.co.za/latest-news-on-the-conference-meetings-and-events>

⁴⁶ These are the Immigration Bureau, the Customs Department, the Excise Department, the Food and Drug Administration, Thailand Industrial Standard Institute [TISI], the Office of Agriculture Regulation, and the Office of the National Broadcasting and Telecommunications Commission [NBTC].



Conclusions

A comprehensive and well-functioning logistics system is generally acknowledged as an integral part in the development full-fledge MICE industries across the board. We have explored the definition of 'logistics system in the aggregate MICE industry', the current economic state of affairs with direct bearing on Thailand's MICE logistics, the current logistic system in Thailand's aggregate MICE industry', and the way forward. It has been found that Thailand's MICE logistics has been developed to a relatively high level in certain areas. However, there is still room for improvement in many others. Also, the country has great potential account of its geographical location, a great variety of natural and cultural attractions, as well as an existing pool of MICE resources. It is the planning process and actual implementation thereof that count the most in Thailand' MICE logistics scenario.



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