

(한국) 자본주의와 디지털 경영 능력

강정수

Digital Transformation

“On the eve of the greatest industrial revolution in history, no sign and portents were forthcoming. Capitalism arrived unannounced. No one had forecast the development of a machine industry; it came as a complete surprise.”

- Karl Polany, The Great Transformation: The Political and Economic Origins of Our Time, 1944, p. 89)

The Great Transformation

“capitalism arrived unannounced!”

“It may be hard to believe, but before the end of this century, 70 percent of today’s occupations will likewise be replaced by automation.

Yes, dear reader, even you will have your job taken away by machines.

In other words, robot replacement is just a matter of time. this upheaval is being led by a second wave of automation, one that is centered on artificial cognition, cheap sensors, machine learning, and distributed smarts.

This deep automation will touch all jobs, from manual labor to knowledge work.”

- Kevin Kelly, Wired, Better than Human 2012

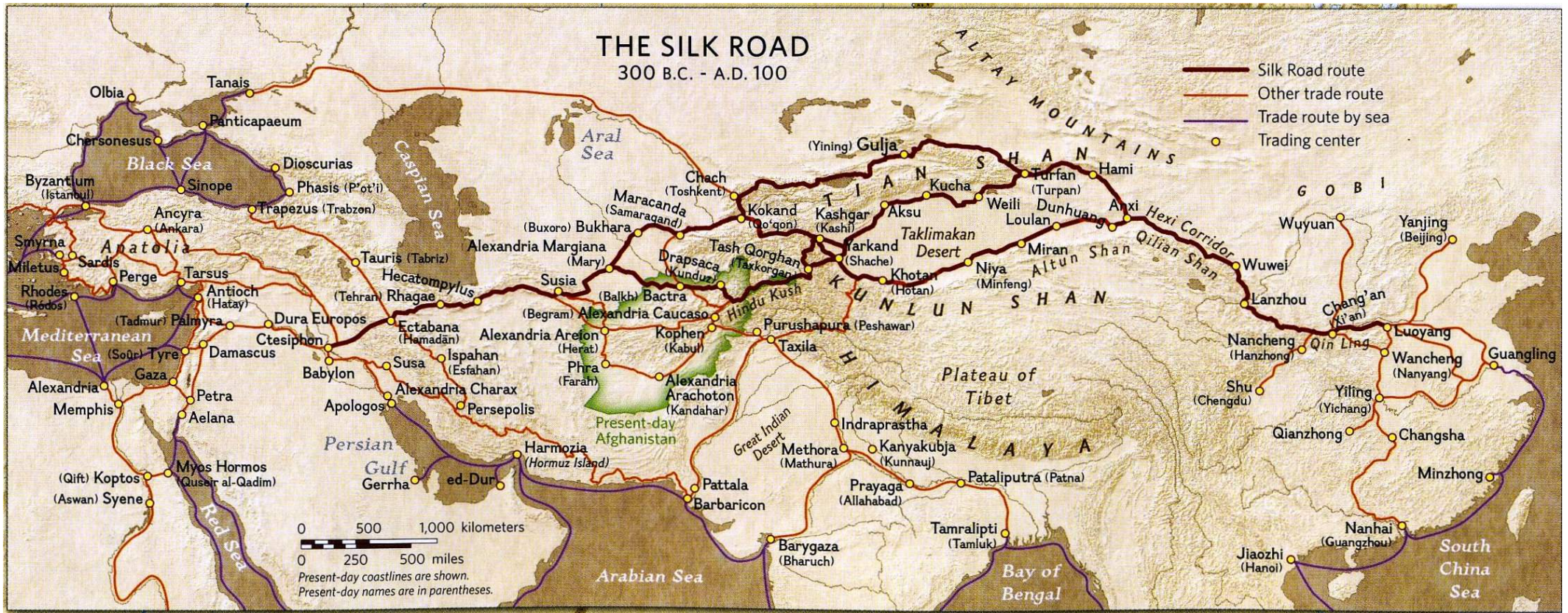
<http://www.wired.com/gadgetlab/2012/12/ff-robots-will-take-our-jobs/all/>

the second wave of automation

from manual labor to knowledge work

Commerce Darwinism

실크로드 무역



길드 guild

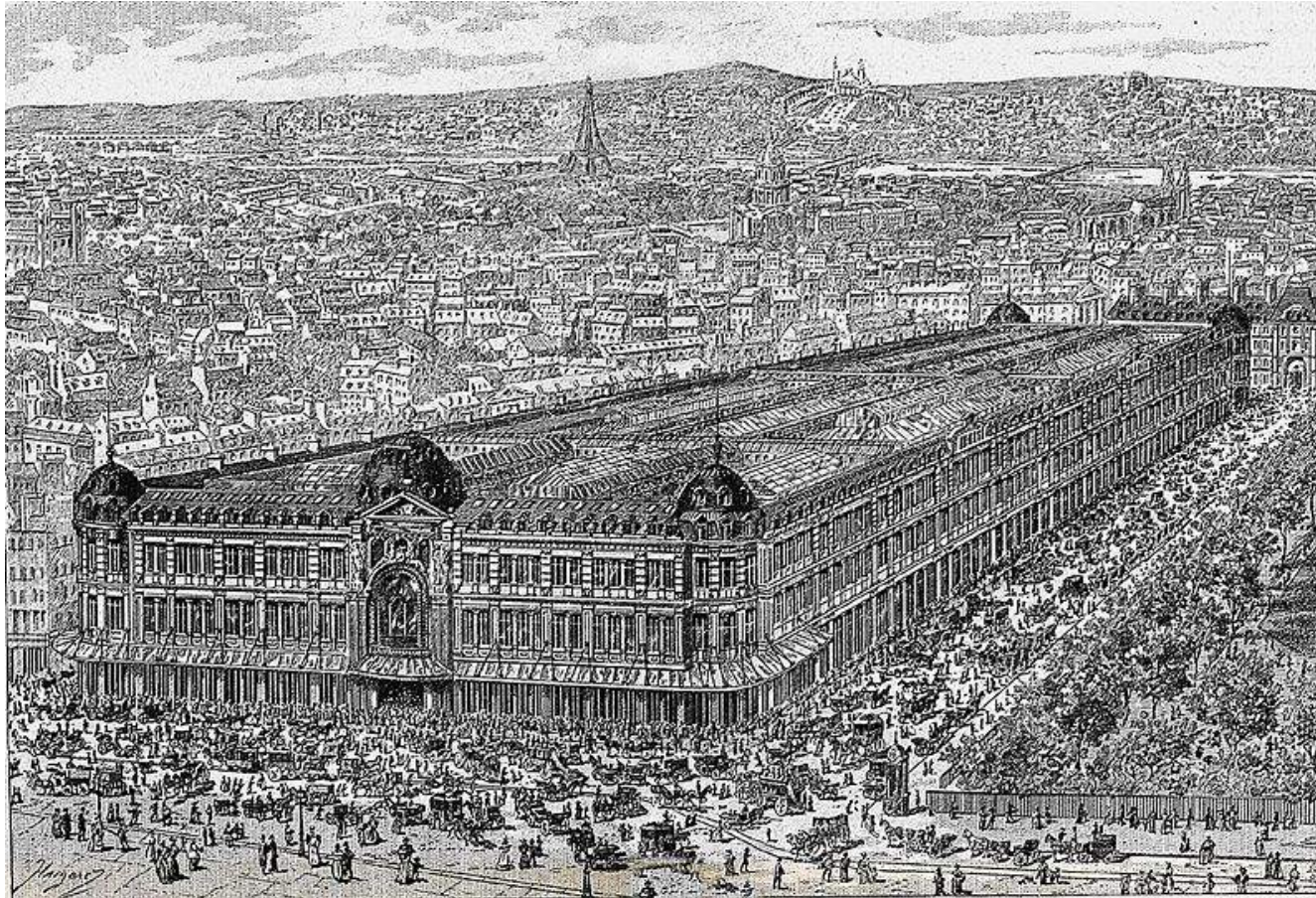


개성상인, 상단



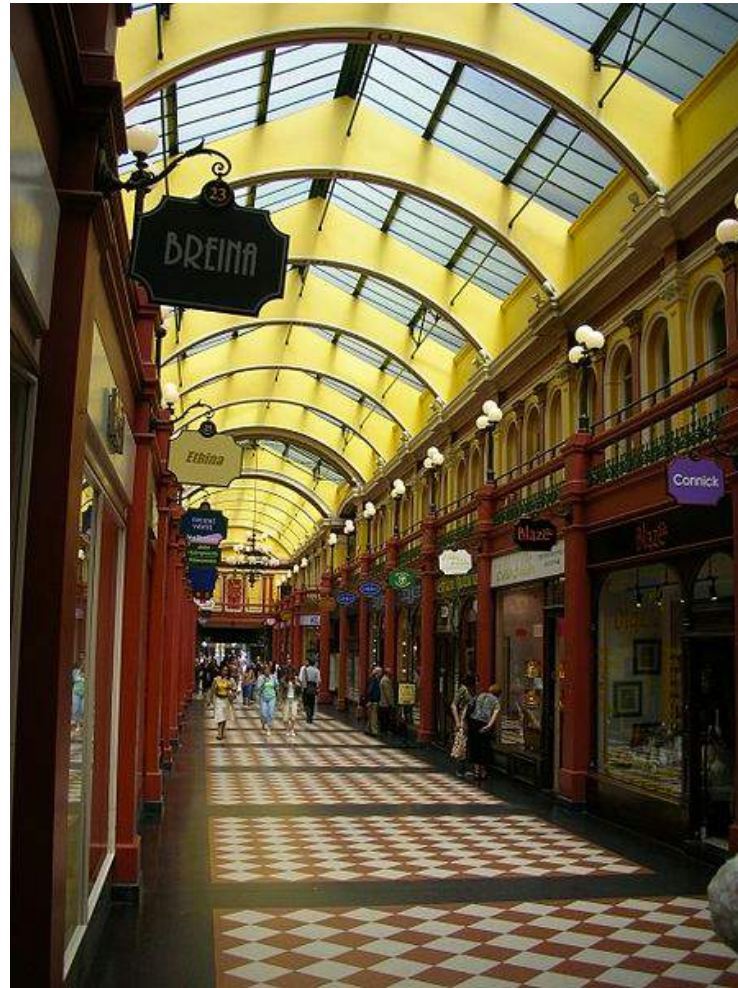
• 플란더즈 화풍으로 잘 알려진 거장 루벤스(1577-1640)의 그림.
「한복을 입은 남자(A Man in Korean costume)」

백화점



Le Bon Marché (since 1838)

쇼핑 센터, 쇼핑 몰



Great Western Arcade (since 1875)

supermarket



Astor Market since 1915

Discount store (chain)



Wal-Mart since 1962

e-commerce

The eBay logo is displayed in a multi-colored, lowercase sans-serif font. The letters are: 'e' (red), 'b' (blue), 'a' (yellow), and 'y' (green). A small 'tm' trademark symbol is positioned to the upper right of the 'y'.The Amazon logo consists of the word 'amazon' in a bold, lowercase, black sans-serif font. Below the letters 'a' through 'n' is a curved orange arrow that starts under the 'a' and ends under the 'n', pointing to the right.

since 1995

evil commerce



거리 상점 / 백화점 / 대형 쇼핑 몰의 쇠퇴

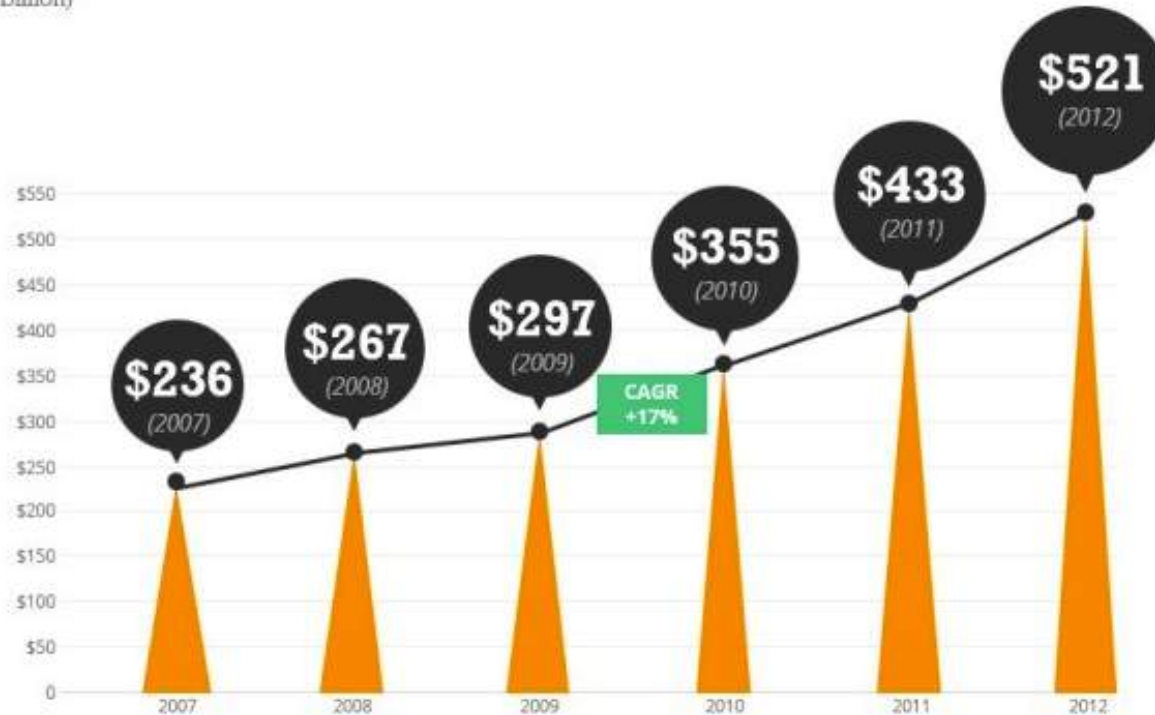
E-Commerce

디지털 커머스 시장 꾸준하게 성장

Global online retail sales have increased **17 percent** yearly since 2007

Global online retail sales

(US\$ billion)



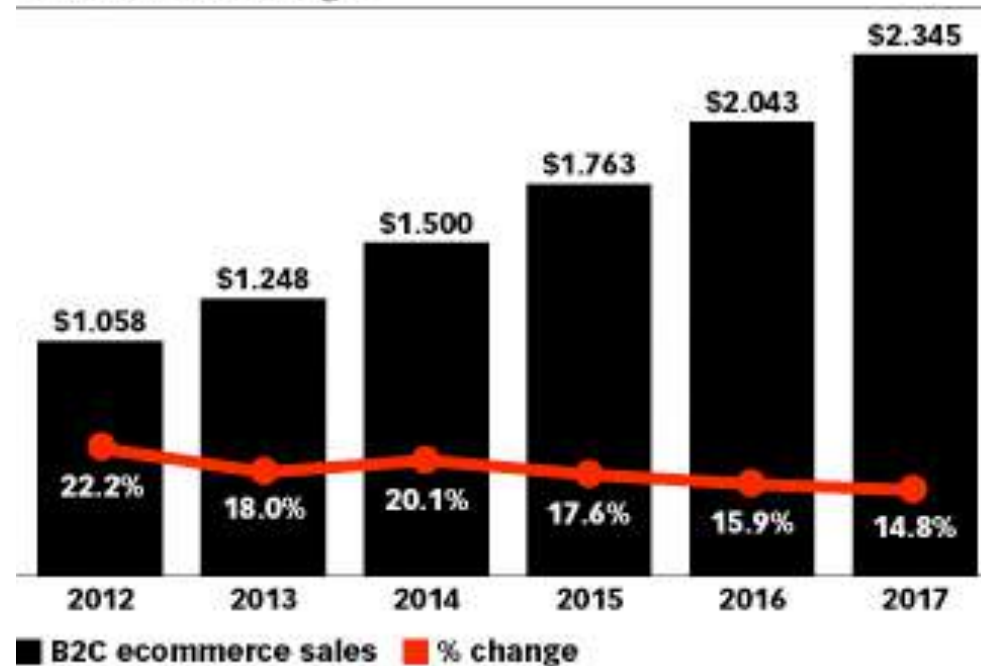
Note: Online retail sales exclude sales tax and are at constant 2012 exchange rates.

*CAGR = Compound Annual Growth Rate

E-Commerce 시장 성장

B2C Ecommerce Sales Worldwide, 2012-2017

trillions and % change



Note: CAGR (2012-2017)=17.3%; includes products and services ordered and leisure and unmanaged business travel sales booked using the internet via any device, regardless of the method of payment or fulfillment

Source: eMarketer, Jan 2014

167671

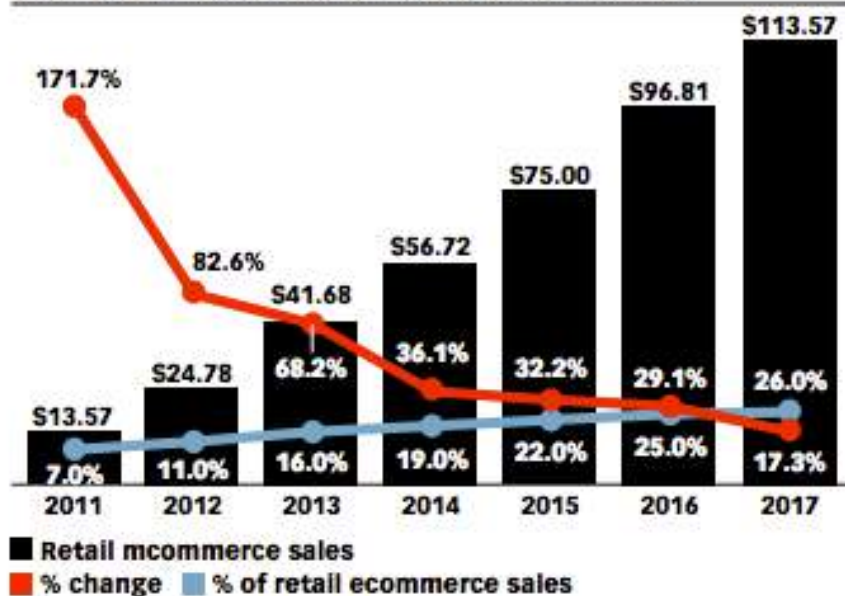
www.eMarketer.com

1조 달러 시장에서 2조 달러 시장으로

M-Commerce 시장 발전

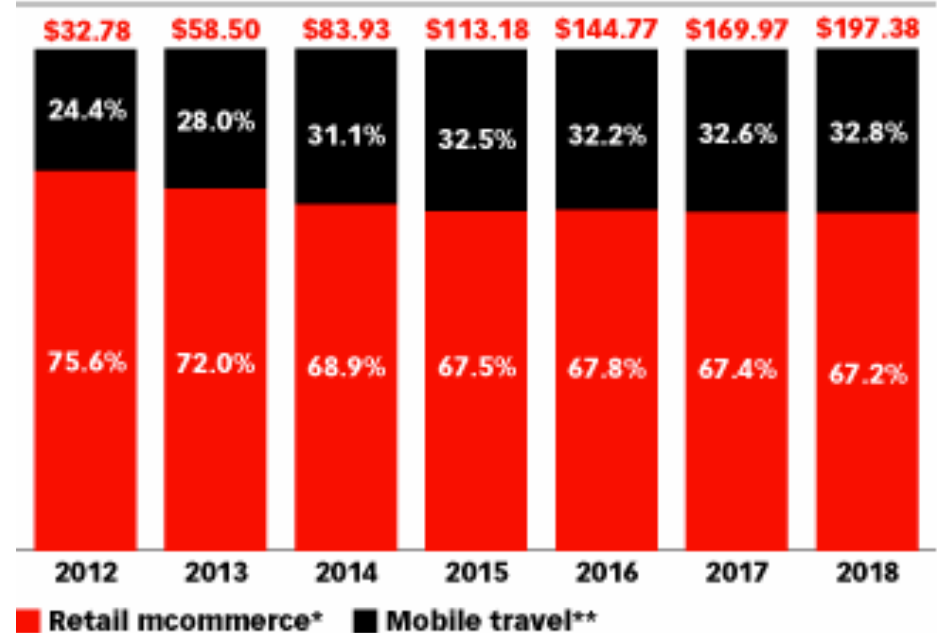
US Retail Mcommerce Sales, 2011-2017

billions, % change and % of retail ecommerce sales



US B2C Mcommerce Sales Share, by Segment, 2012-2018

% of total and billions



Note: *includes products or services ordered using the internet via mobile devices, regardless of the method of payment or fulfillment; excludes event tickets; **includes leisure and unmanaged business travel sales booked via mobile device

Source: eMarketer, April 2014

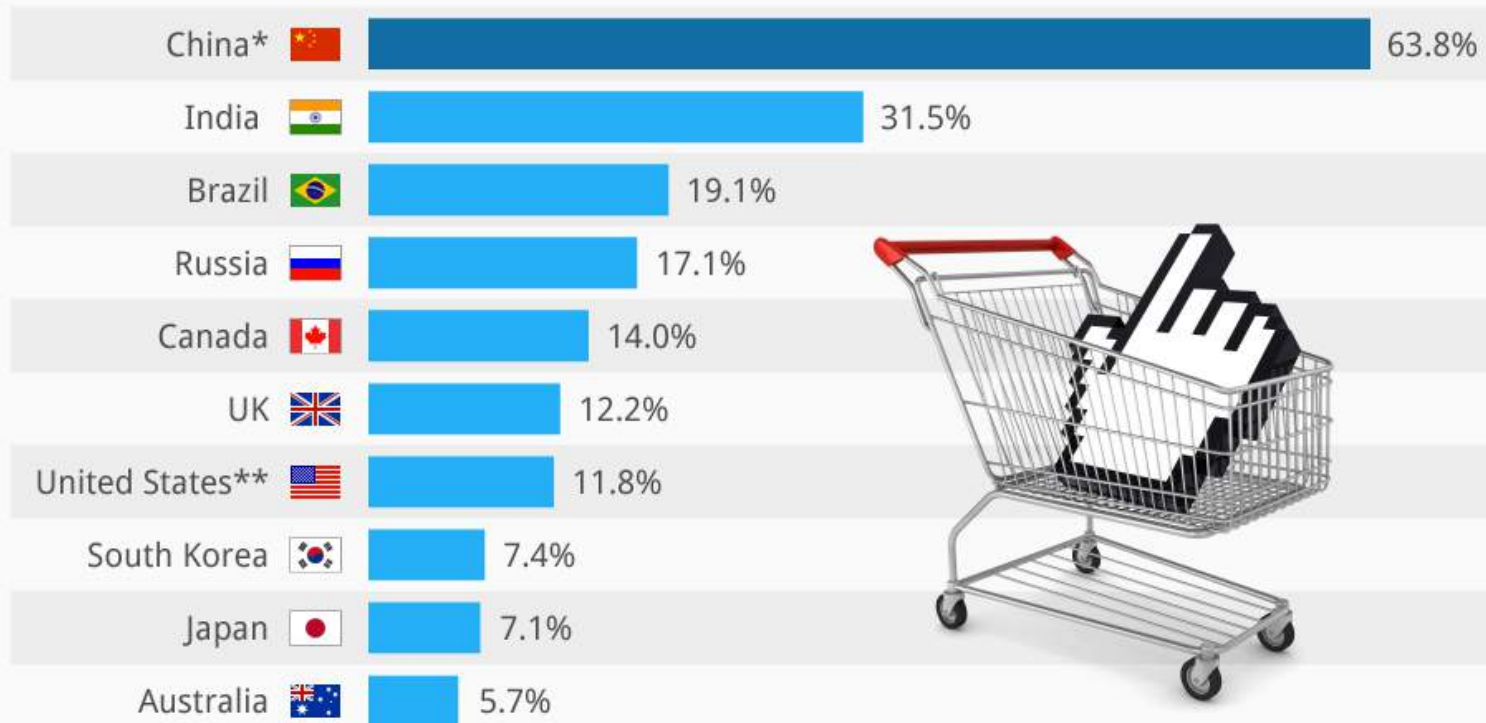
171831

www.eMarketer.com

중국시장

China on Path to World Domination in Ecommerce

Forecast: B2C ecommerce sales growth in selected countries in 2014



Includes products and services ordered and leisure and unmanaged business travel sales booked using the Internet.

* includes sales from businesses that occur over C2C platforms; excludes Hong Kong

** excludes event tickets

Source: eMarketer

Mashable statista

디지털 소비자 비율: 90% 이상

USA Statistics

Ecommerce sales will account for just 6.4% of the \$4.73 trillion in total US retail sales expected in 2014.

US Digital Shoppers and Buyers, 2012-2018

millions and % of internet users



E-Commerce란?



[REGISTER / SIGN IN](#)

[MENU](#)

[QUICK REORDER](#)

[YOUR ACCOUNT](#)

[DELIVERY AREAS](#)

[CHECK OUT](#)



Enjoy the convenience of *BK*®
delivered right to your door.

Enter your zip code to get started:

[ORDER NOW](#)

E-Commerce란?



다이어트는
포샵의 료



Google Play™에서 배달의민족을 다운로드
www.deliverypeople.com

E-Commerce란?

Magic

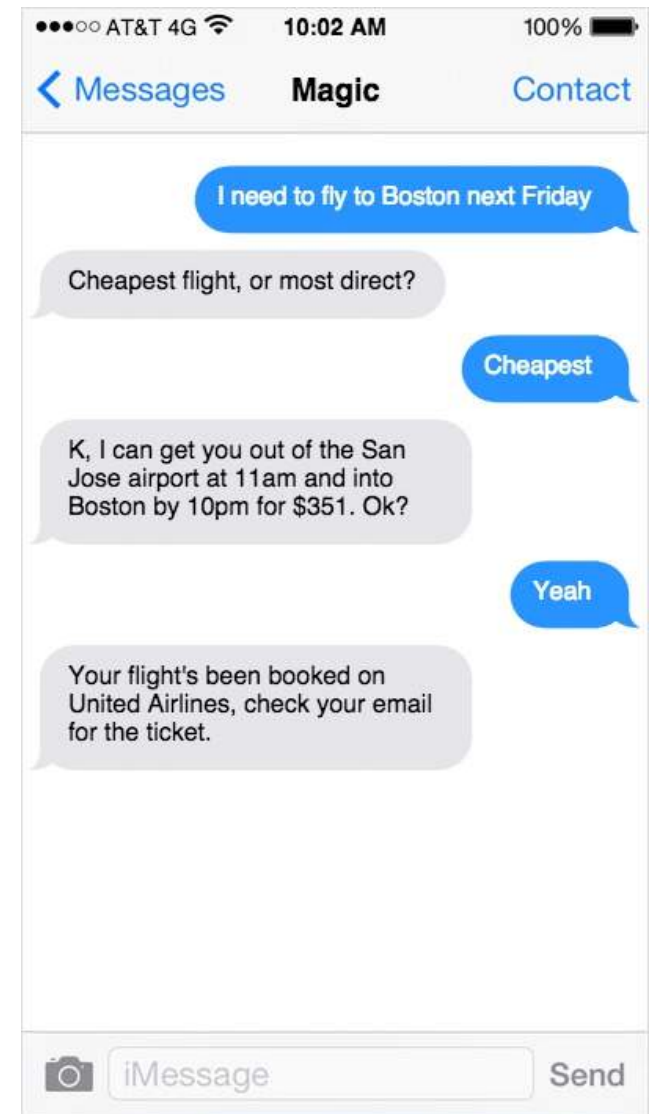
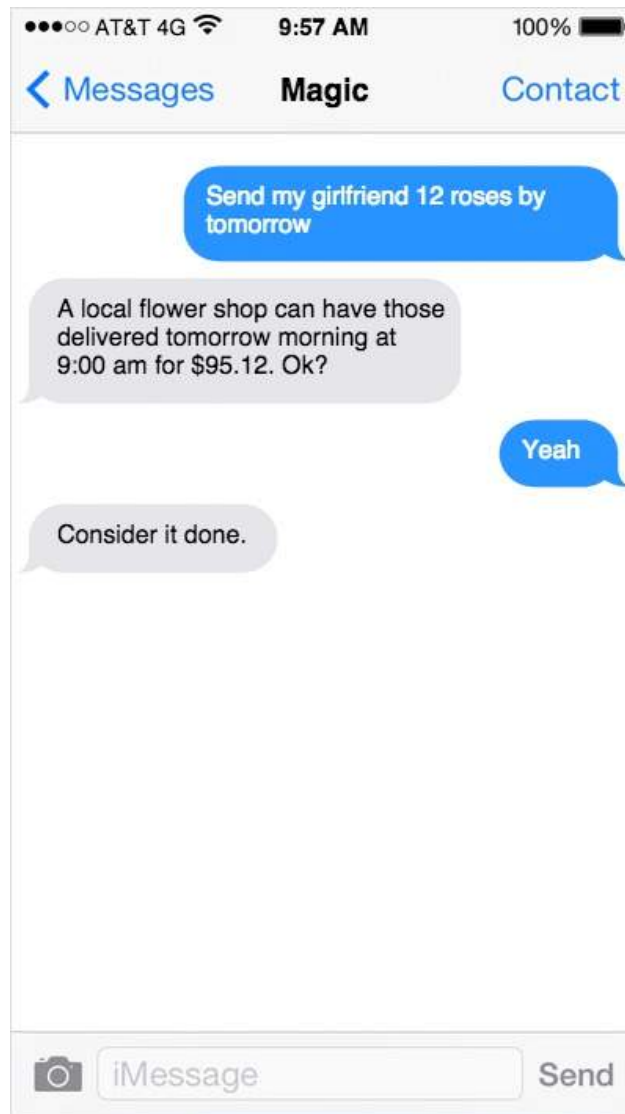
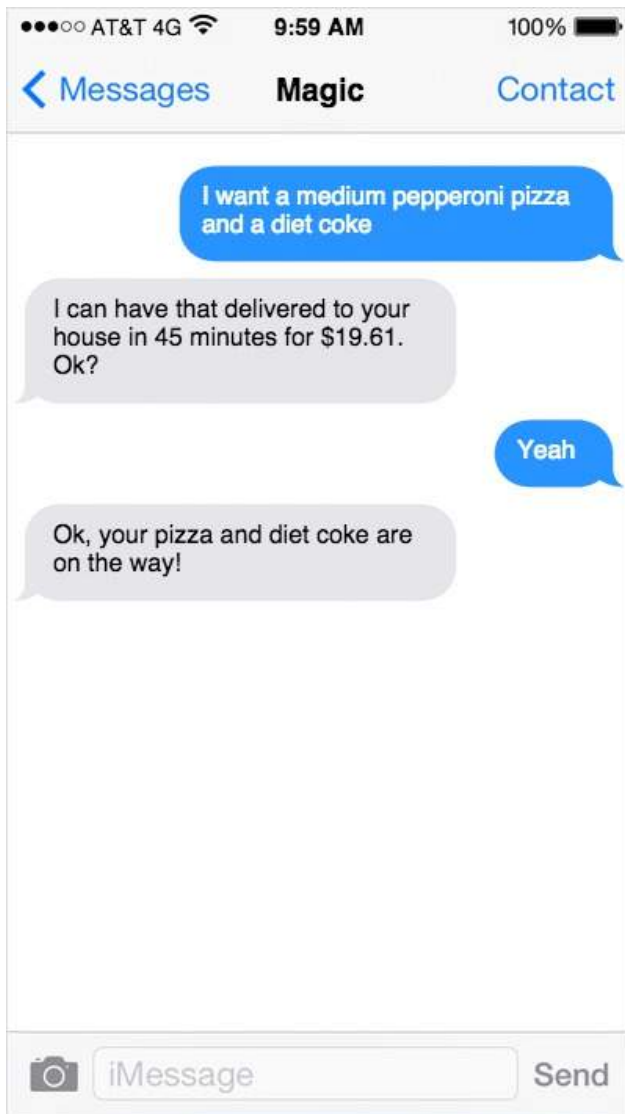
**Text this phone number to get whatever
you want on demand with no hassle:**

83489

*Text "MAGIC" to this number now to get started.
Msg&data rates may apply*

Butler 서비스 / Virtual Assistant

Magic



Showrooming vs. Webrooming

Trends

US Digital Shoppers Who Have Made Purchases Webrooming vs. Showrooming, Nov 2013

% of respondents



Note: in the past 12 months

Source: Accenture, "The Seamless Consumer Retail Survey," Feb 3, 2014

171240

www.eMarketer.com

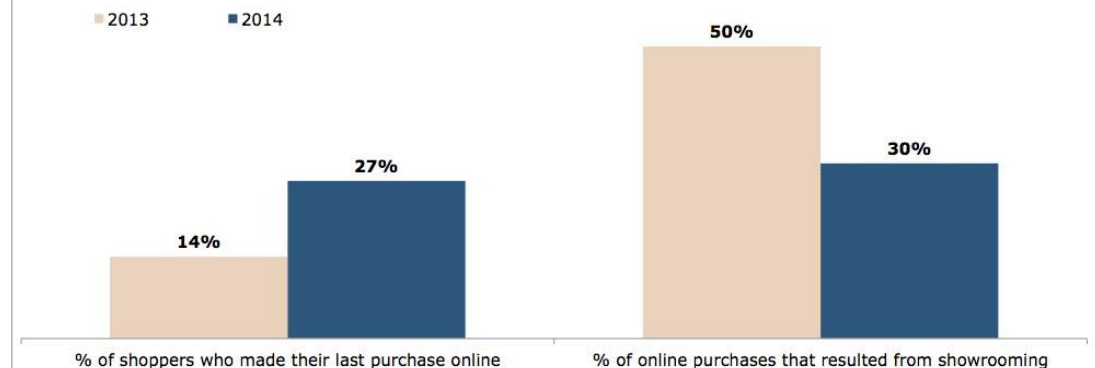
"Webrooming" = researching online before heading to a store to make a purchase.

"Showrooming" = bought digitally after seeing a product in a store.

Global Online Sales Growth, and Showrooming's Declining Impact

% of global respondents

January 2014



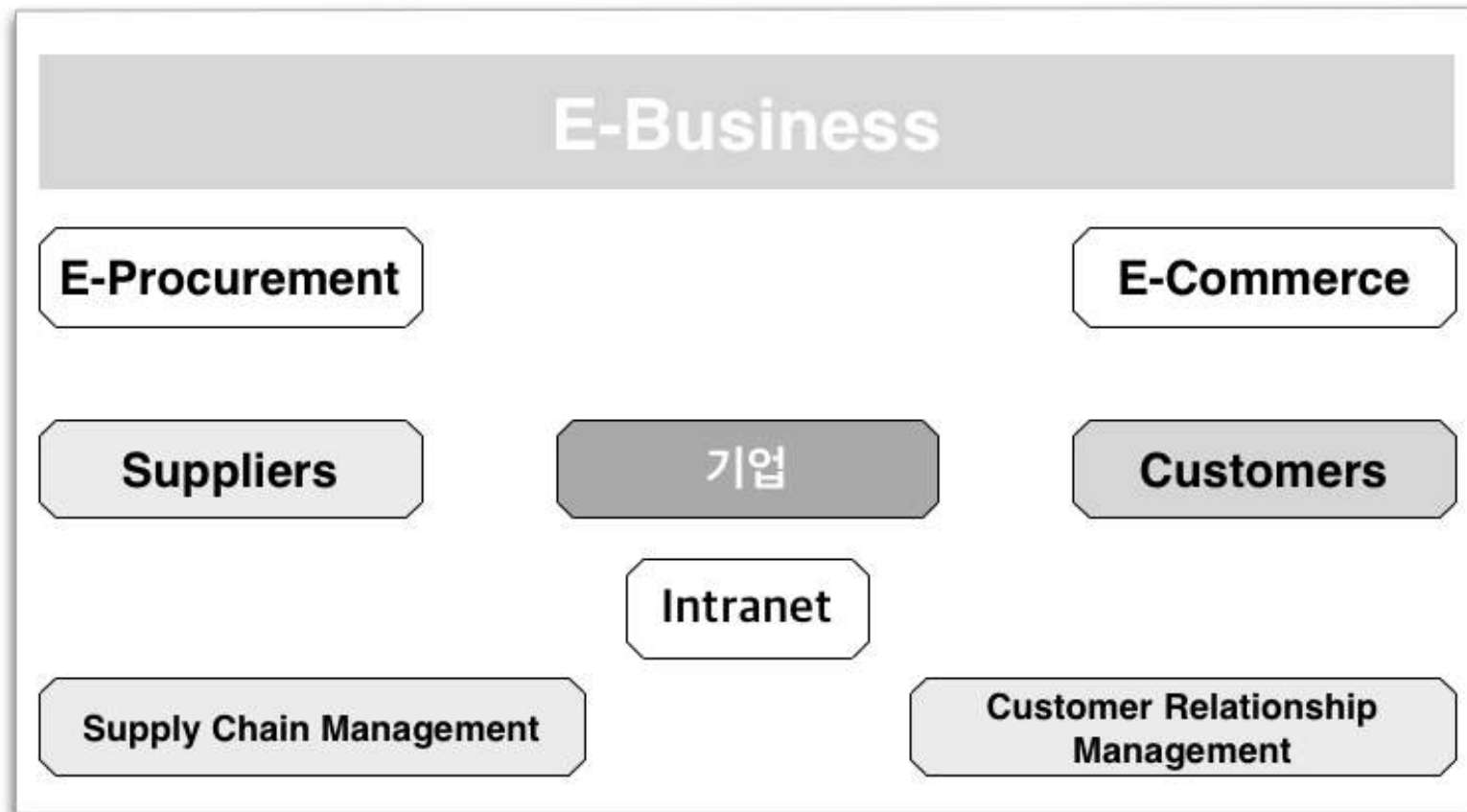
MC MARKETINGCHARTS.COM

Source: IBM

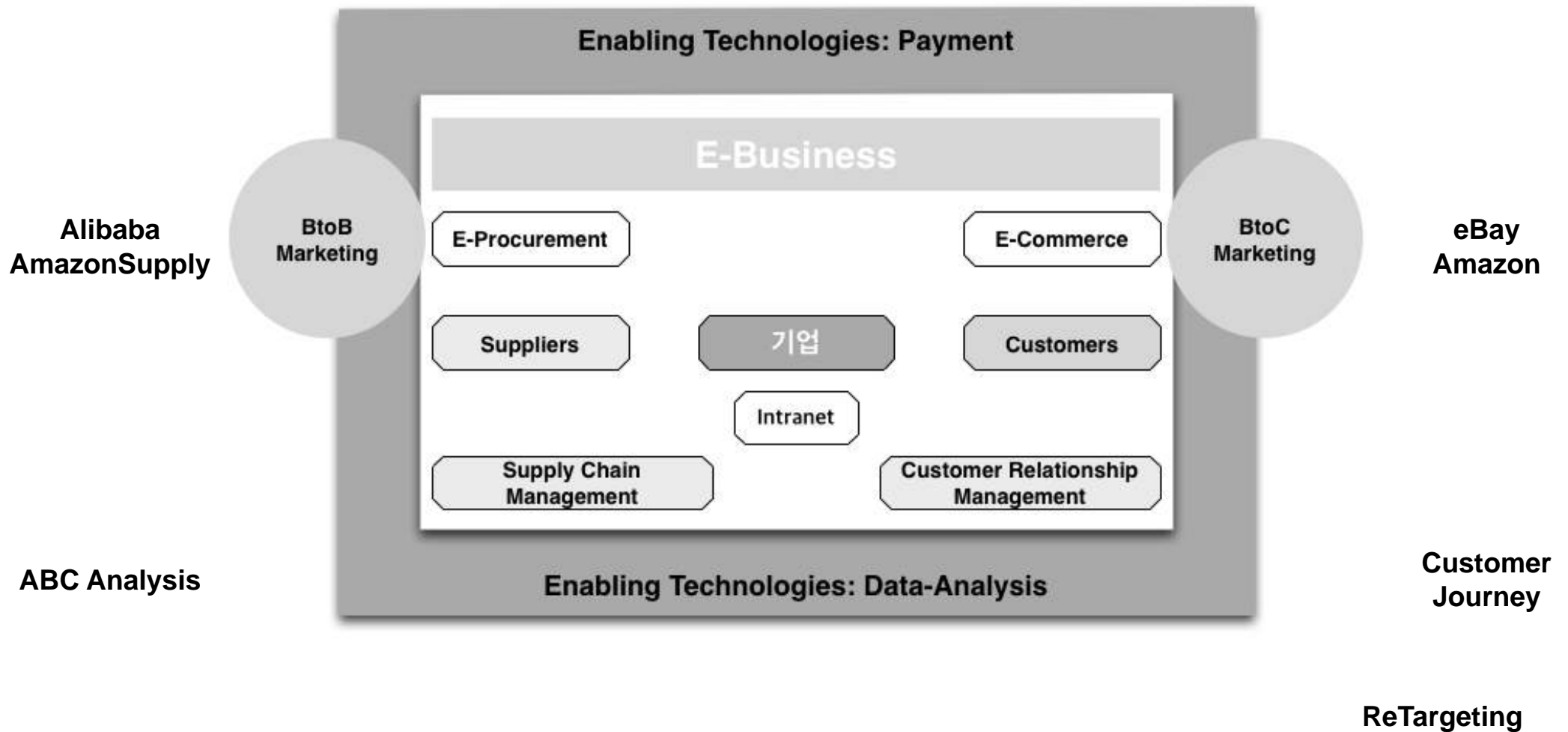
consolidation at Point of Sale



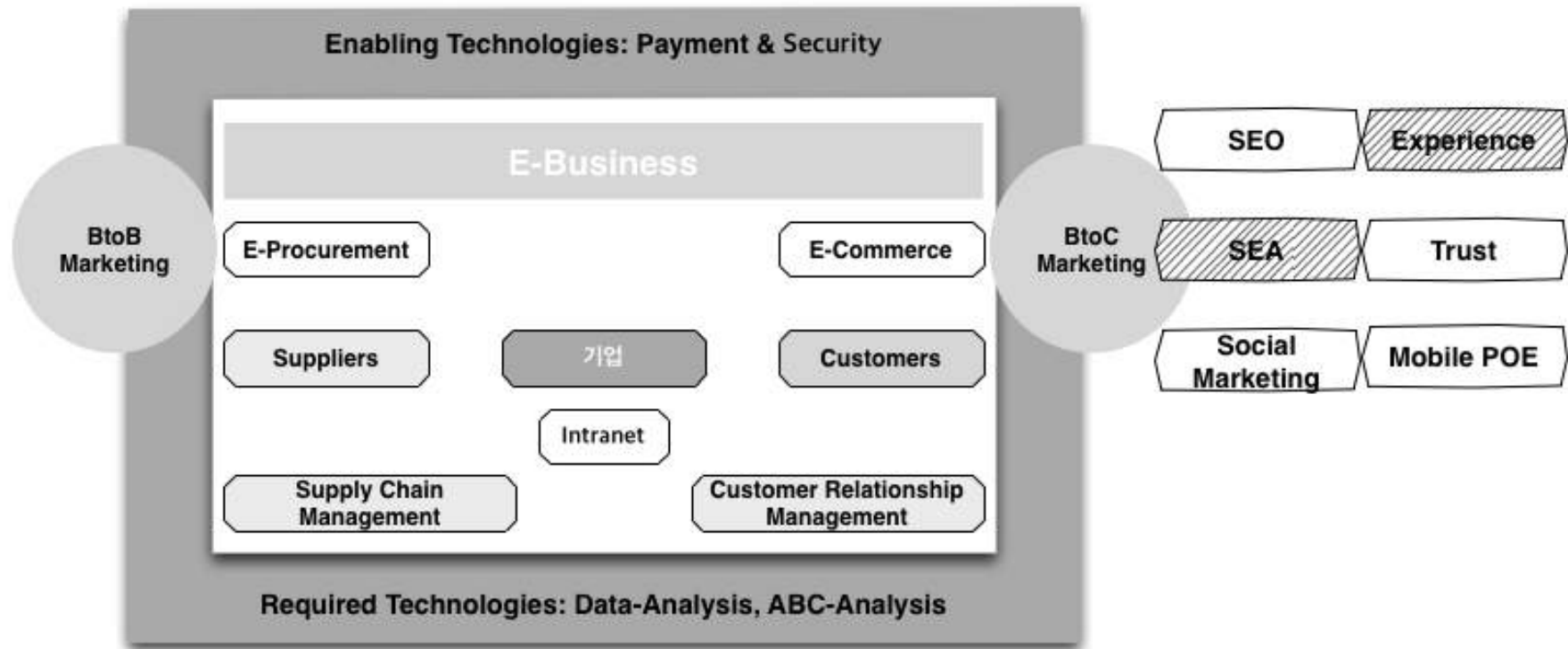
전통적인 E-Commerce 정의



E-Commerce (확장)

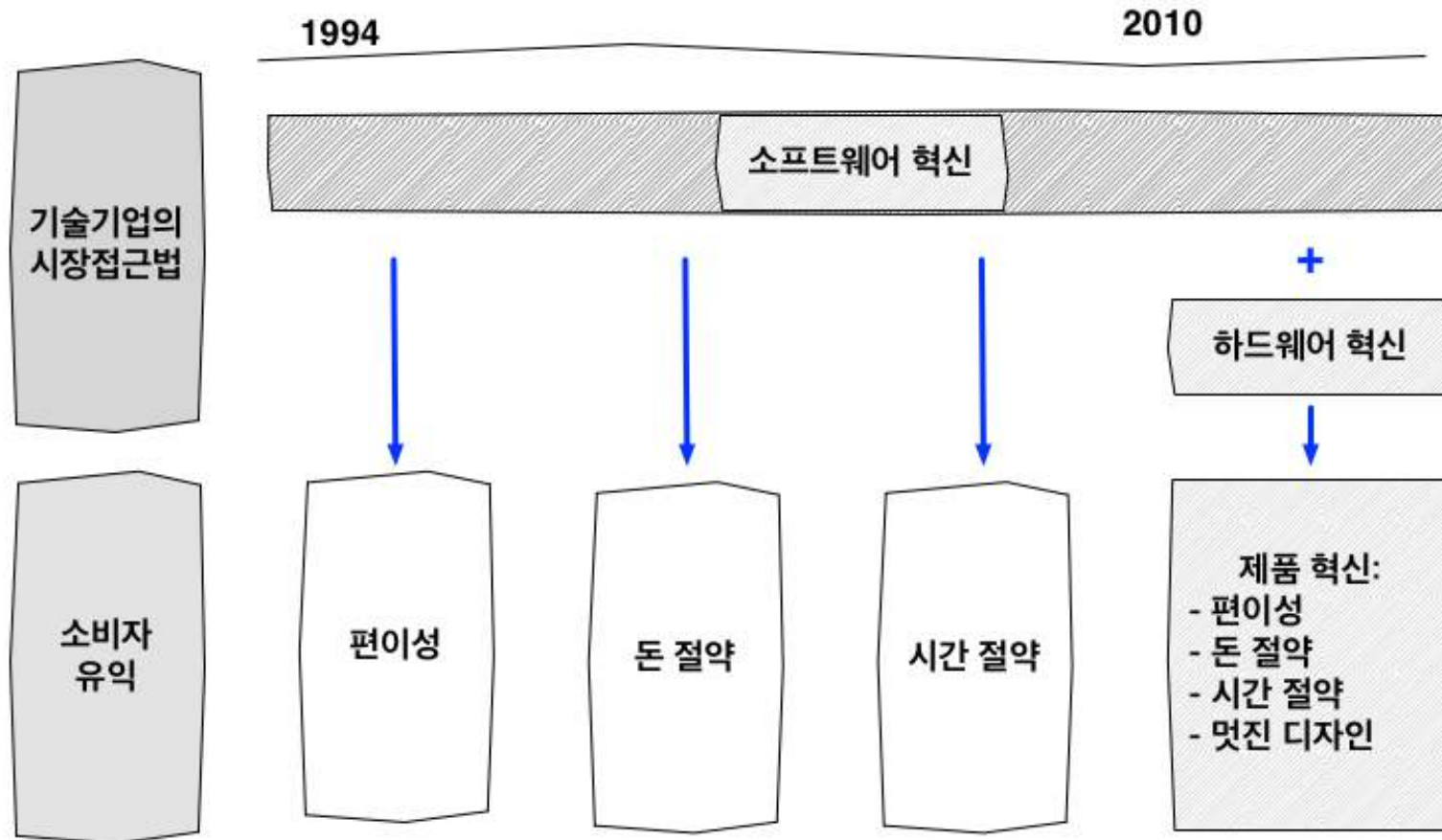


E-Commerce(확장 II)

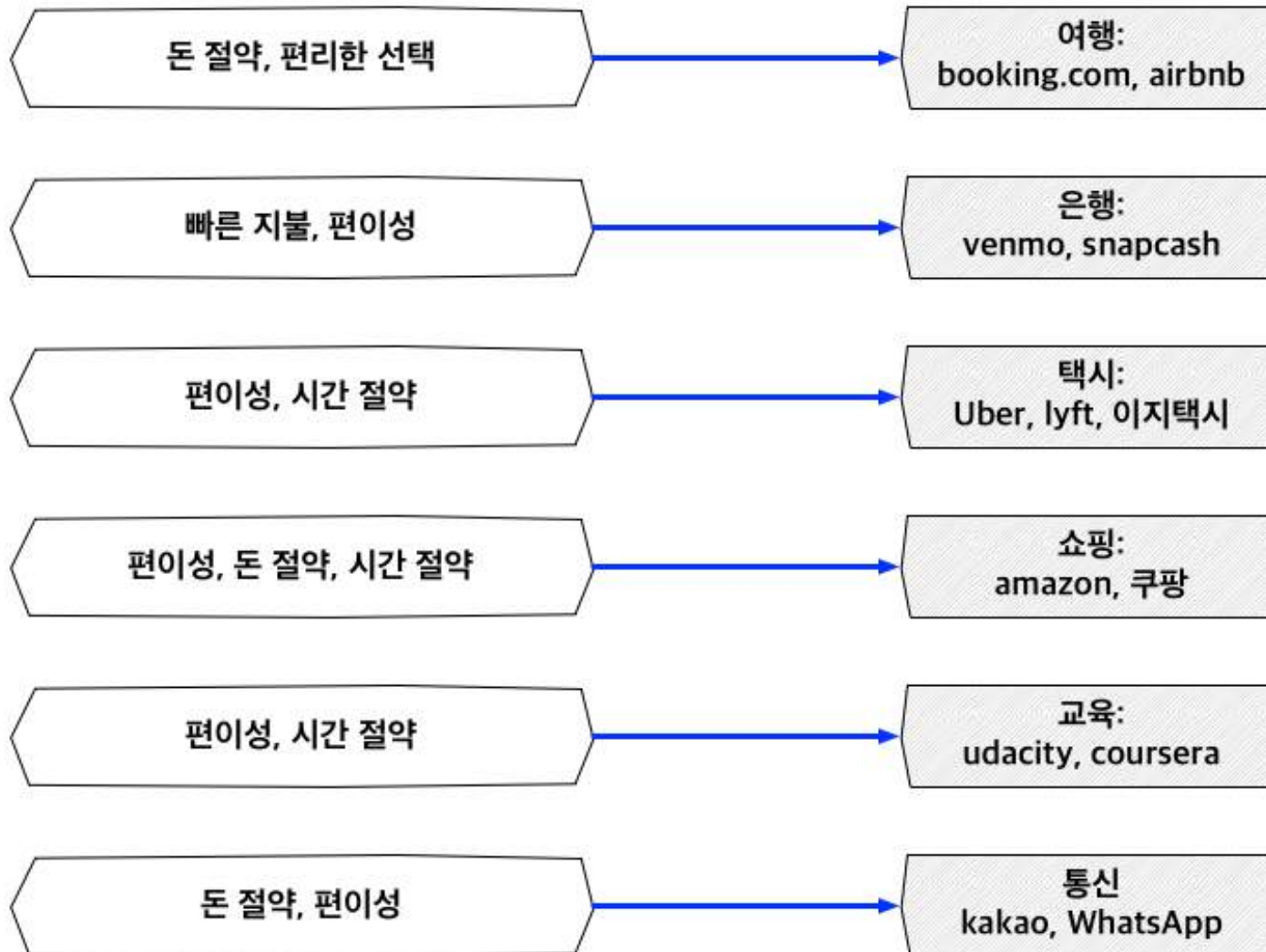


From Software to Hardware

기술기업의 시장접근법



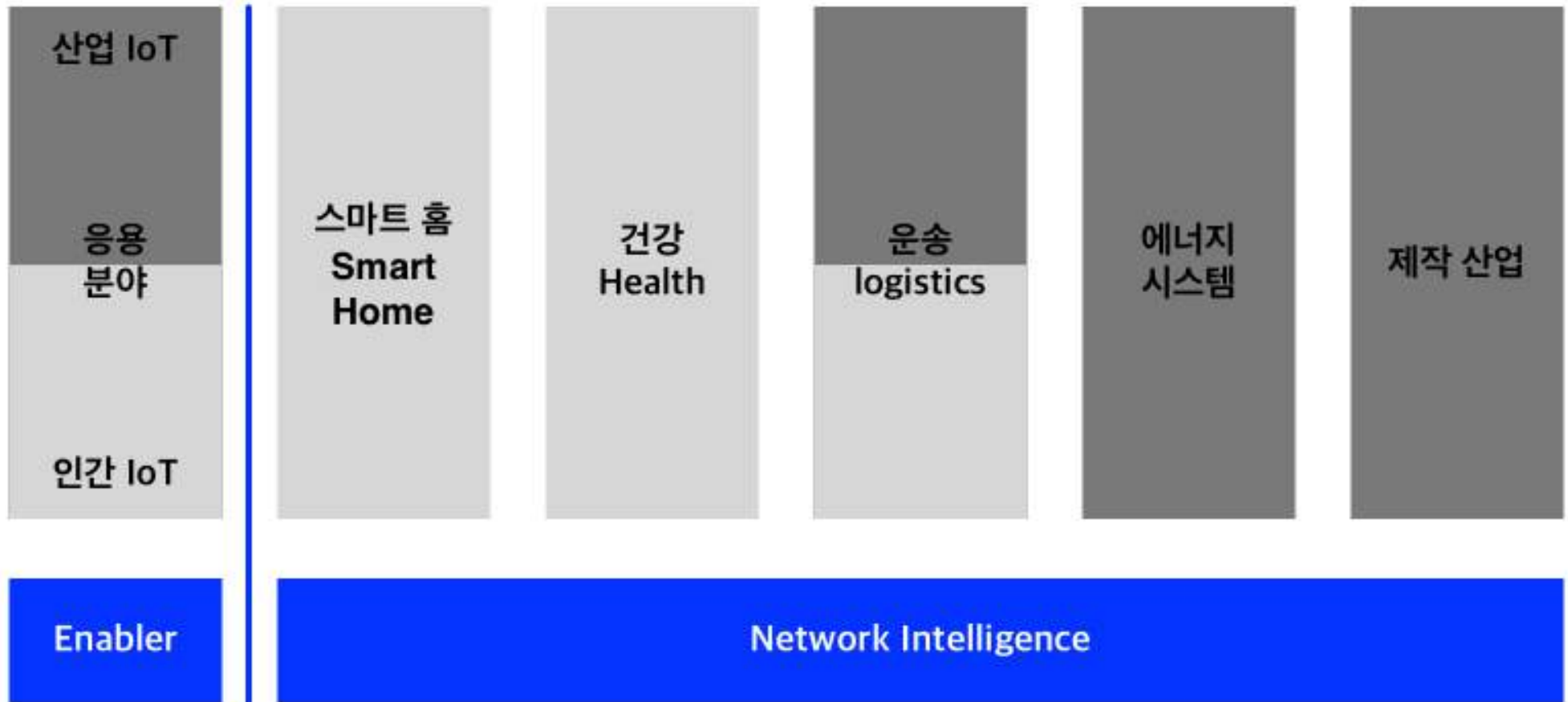
기술기업의 시장접근법



시장질서파괴기술로서 소프트웨어



사물의 인터넷



Network Intelligence

enabling technologies

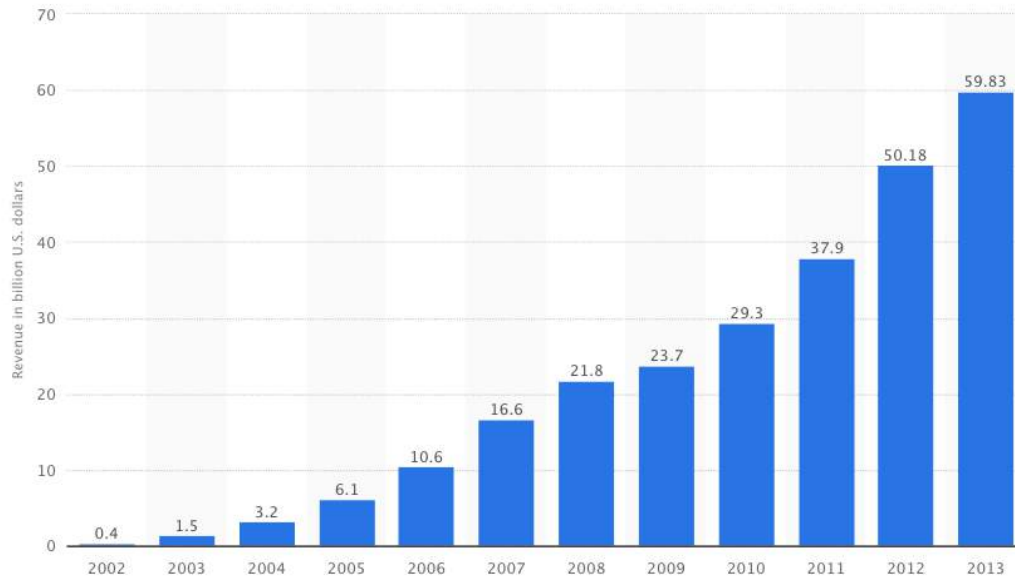
sensor network?

protocol: network intelligence

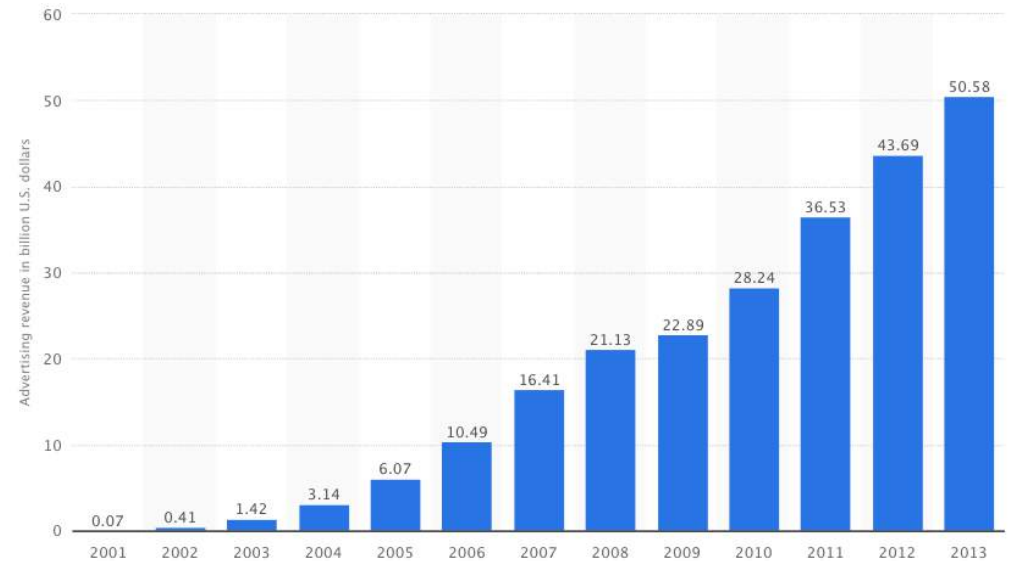
구글과 디지털 포석

구글 매출 변화

Google's global revenue from 2002 to 2013 (in billion U.S. dollars)



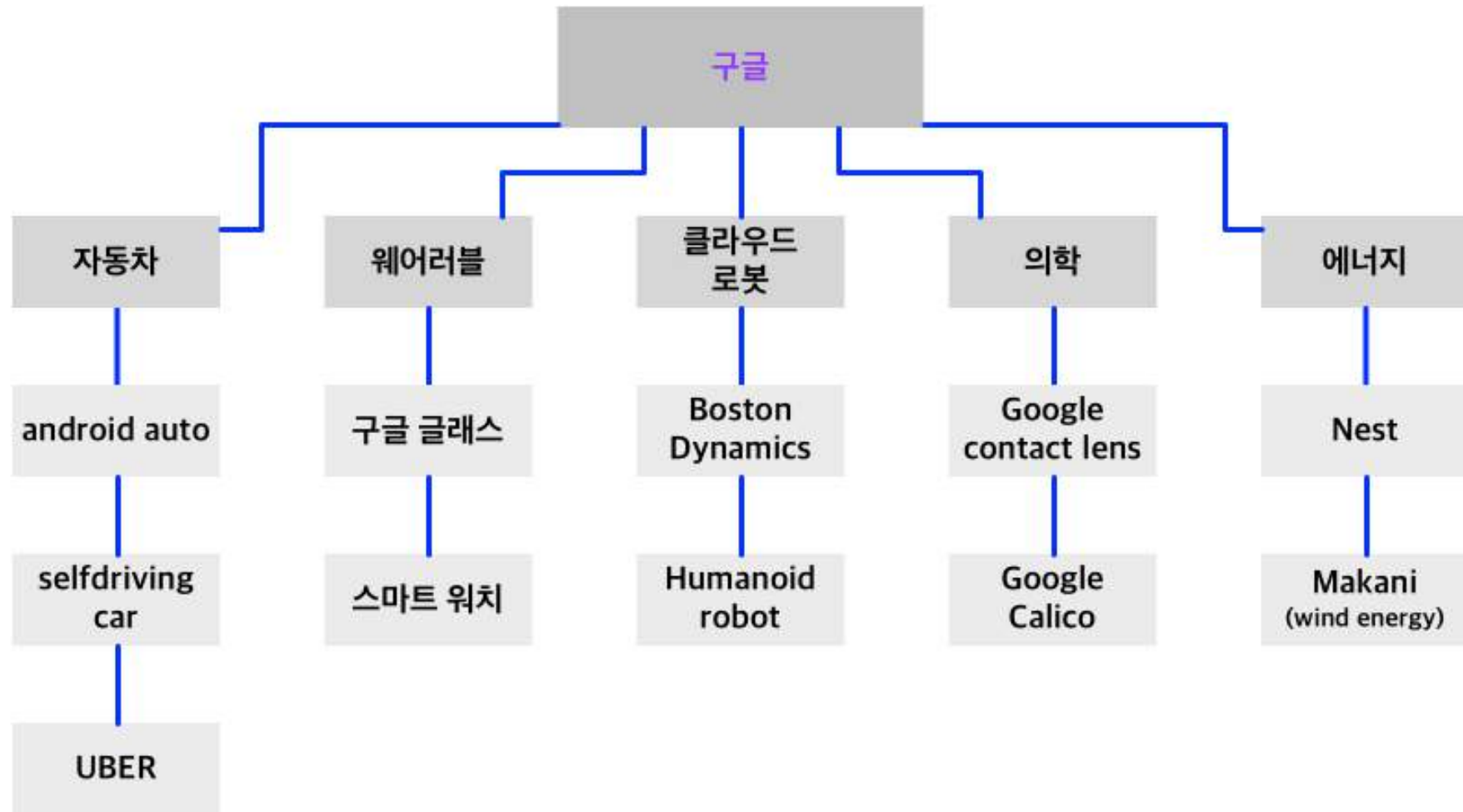
Google's advertising revenue from 2001 to 2013 (in billion U.S. dollars)



Google X Labs since 2010



Google X Labs



디지털 포석

Amazon의 AWS since 2006

Axel Springer since 2007

Amazon

아마존 사업 및 서비스



amazonfulfillment

창고/보관

amazon supply

BtoB

amazon Prime

Bundling: shopping
+ media

아마존 사업 및 서비스



클라우드/SaaS



전자책 서비스/하드웨어



스마트폰

아마존 사업 및 서비스

amazon fireTV

OTT Tool

amazon  instant video

VoD

amazonstudios

시나리오 창작센터

아마존 특허



US006963850B1

(12) **United States Patent**
Bezos et al.

(10) **Patent No.:** **US 6,963,850 B1**

(45) **Date of Patent:** **Nov. 8, 2005**

(54) **COMPUTER SERVICES FOR ASSISTING
USERS IN LOCATING AND EVALUATING
ITEMS IN AN ELECTRONIC CATALOG
BASED ON ACTIONS PERFORMED BY
MEMBERS OF SPECIFIC USER
COMMUNITIES**

(75) Inventors: **Jeffrey P. Bezos**, Seattle, WA (US);
Joel R. Spiegel, Woodinville, WA (US);
Jon McAuliffe, Seattle, WA (US)

OTHER PUBLICATIONS

Peggy Watt "Varied collaborative approaches entice intranet users," Network World, Framington, Apr. 21, 1997, vol. 14, issue 16, p. S14.*

Gerald O'Connell, "New Pitch", Internet World, May 1995, pp. 54-56.*

(Continued)

1-Click

아마존 특허

United States Patent
Scofield et al.

(10) **Patent No.:** US 8,073,460 B1
(45) **Date of Patent:** Dec. 6, 2011

**SYSTEM AND METHOD FOR PROVIDING
ADVERTISEMENT BASED ON MOBILE
DEVICE TRAVEL PATTERNS**

Inventors: **Christopher L. Scofield**, Seattle, WA
(US); **Elmore Eugene Pope**,
Sammamish, WA (US); **Brad E.
Marshall**, Bainbridge Island, WA (US);
Eric B. Merritt, Seattle, WA (US)

Assignee: **Amazon Technologies, Inc.** Reno, NV
(US)

6,801,778	B2	10/2004	Koorapaty	
6,806,830	B2	10/2004	Panasik	
6,903,685	B1	6/2005	Arndt	
2002/0002504	A1 *	1/2002	Engel et al.	705/26
2002/0050927	A1 *	5/2002	De Moerloose et al.	340/539
2002/0077130	A1 *	6/2002	Owensby	455/466
2002/0094787	A1	7/2002	Avnet et al.	
2002/0111154	A1	8/2002	Eldering et al.	
2002/0183059	A1	12/2002	Noreen et al.	
2003/0126150	A1	7/2003	Chan	
2003/0200128	A1 *	10/2003	Doherty	705/8
2004/0044574	A1 *	3/2004	Cochran et al.	705/14
2004/0127217	A1	7/2004	Aoki et al.	

(Continued)

예측기술

아마존 예측 기술

CBS NEWS / January 20, 2014, 11:56 AM

Amazon files patent for “anticipatory” shipping



WSJ. **D** ☰ TECH

Digits Tech News & Analysis
From the WSJ



COMPANIES ▾

MOBILE

PRIVACY

SOCIAL MEDIA

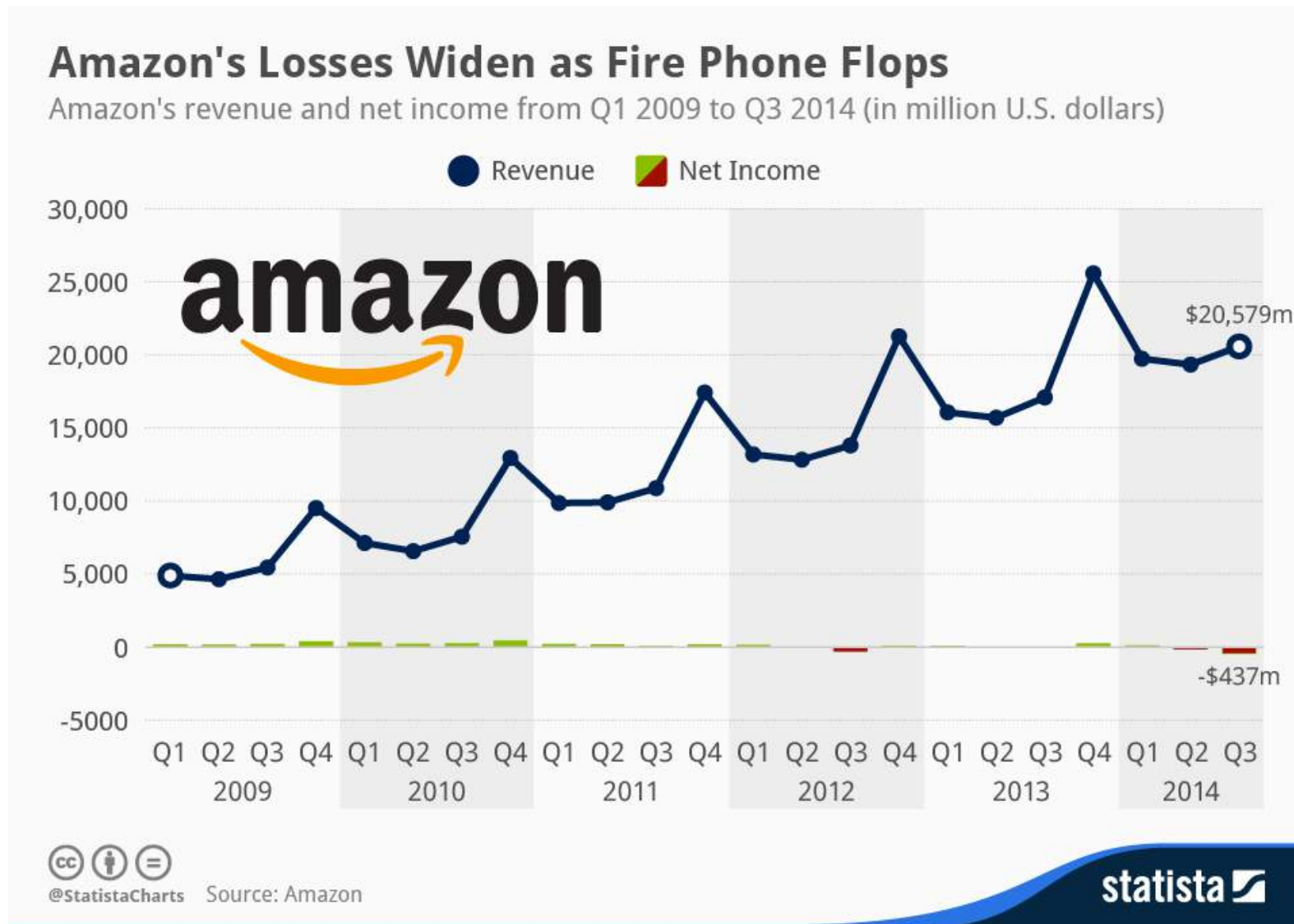
HOT TOPICS: PERSONAL TECHNOLOGY VENTURE CAPITAL APPLE GOOGLE ALIBABA B

3:12 pm ET
Jan 17, 2014

AMAZON

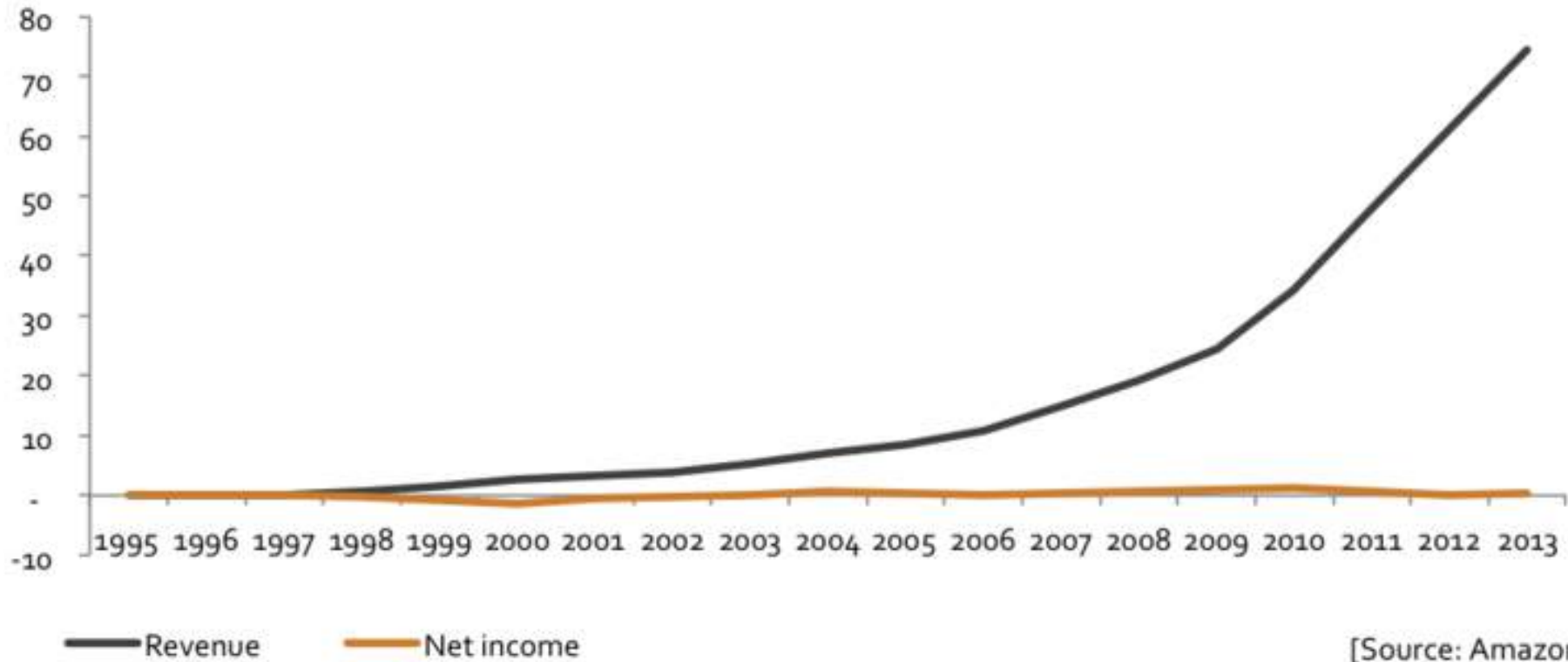
Amazon Wants to Ship Your Package Before You Buy It

2014년 3/4분기 손실 사상 최대

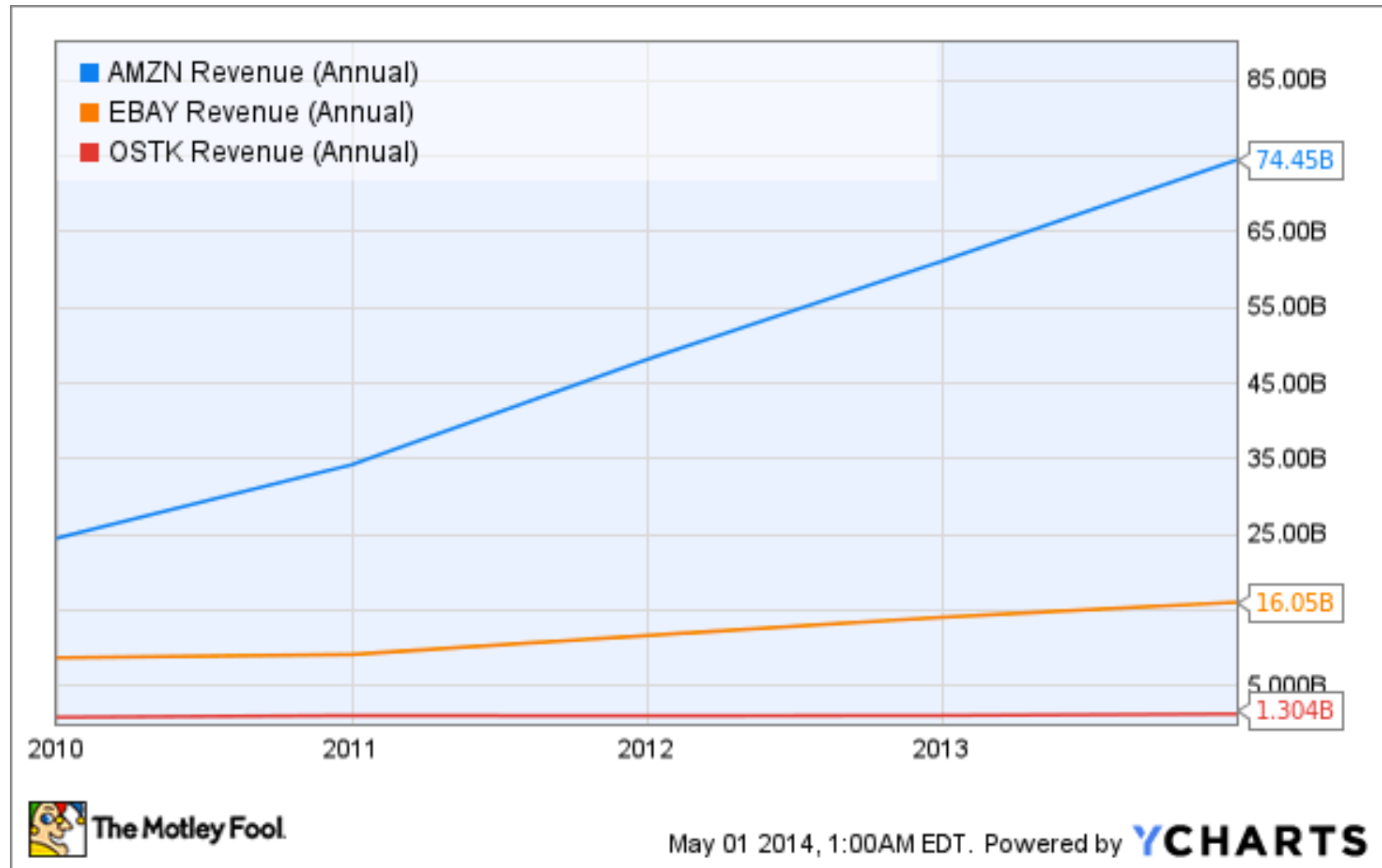


매출 vs. 순이익

Amazon since launch (\$bn)

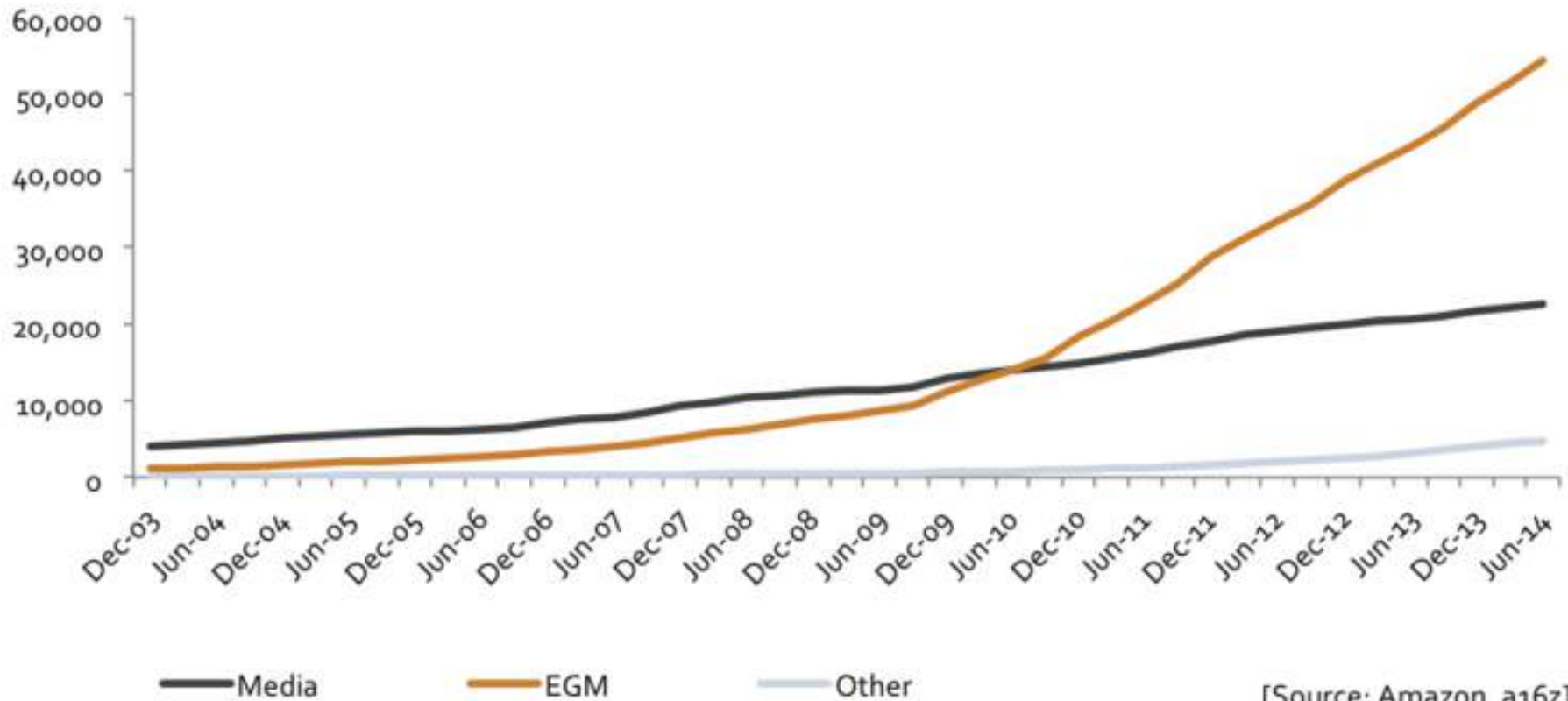


아마존 vs. 이베이



매출 구성

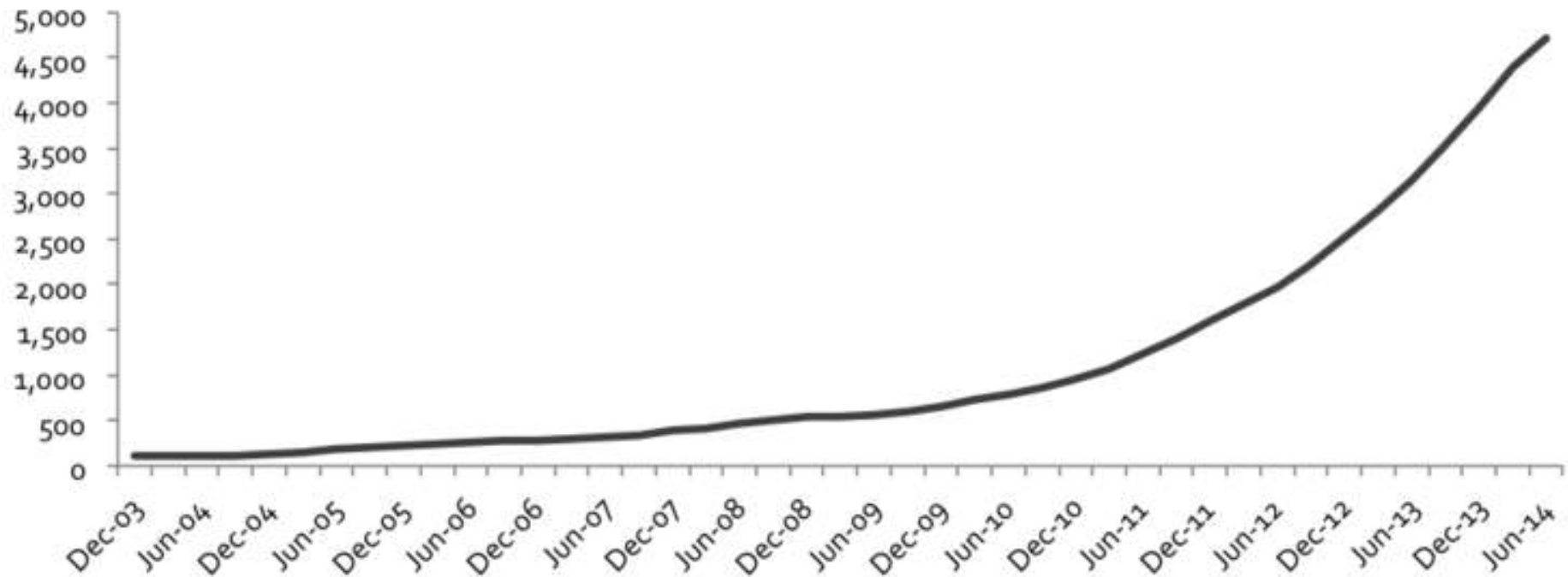
Amazon TTM segment revenue (\$m)



[Source: Amazon, a16z]

매출구성

Amazon 'Other' TTM revenue (\$m)



[Source: Amazon, a16z]

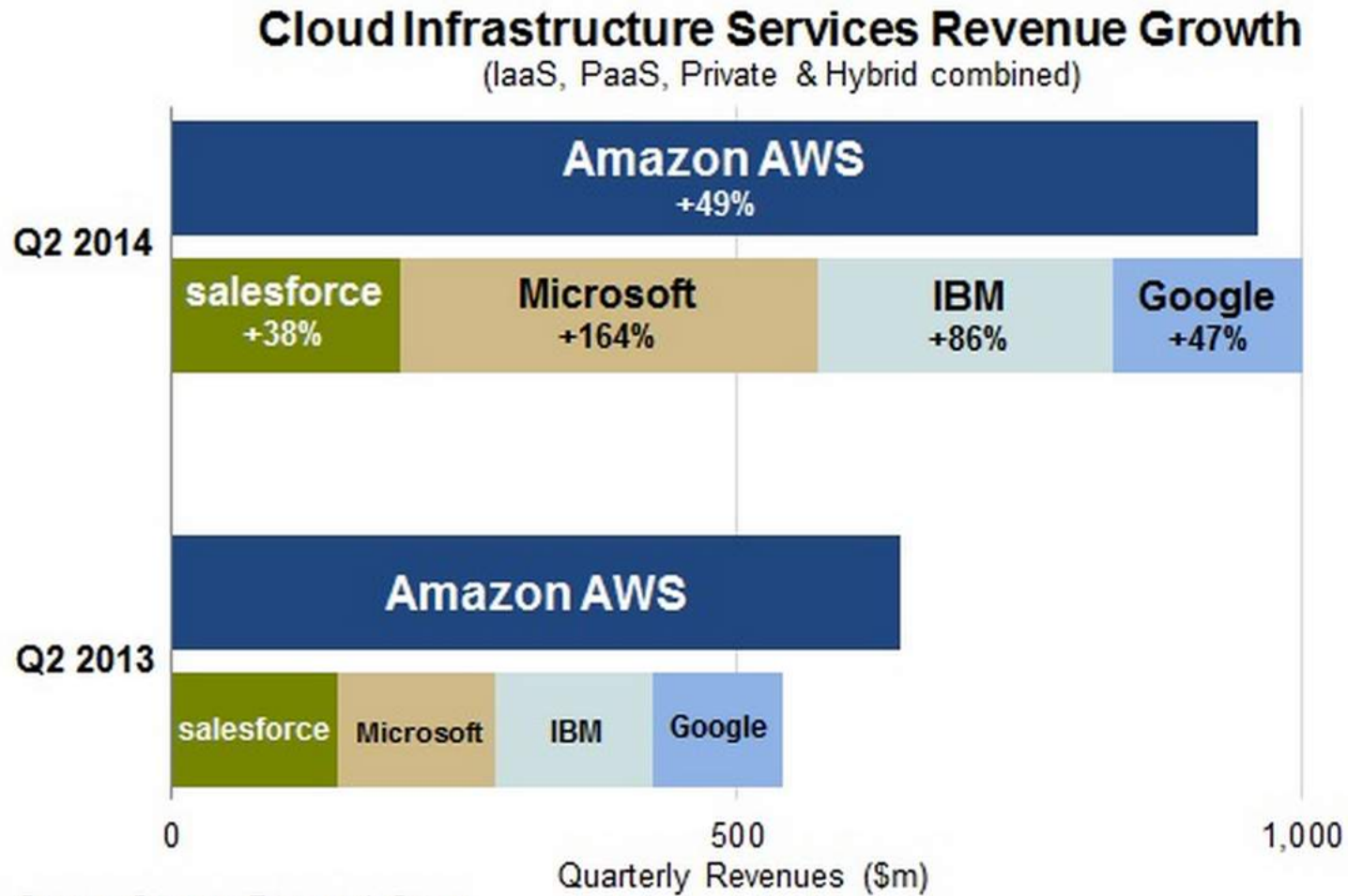
디지털 포식: AWS

Amazon Web Services since 2006

2003년 하반기부터 기획

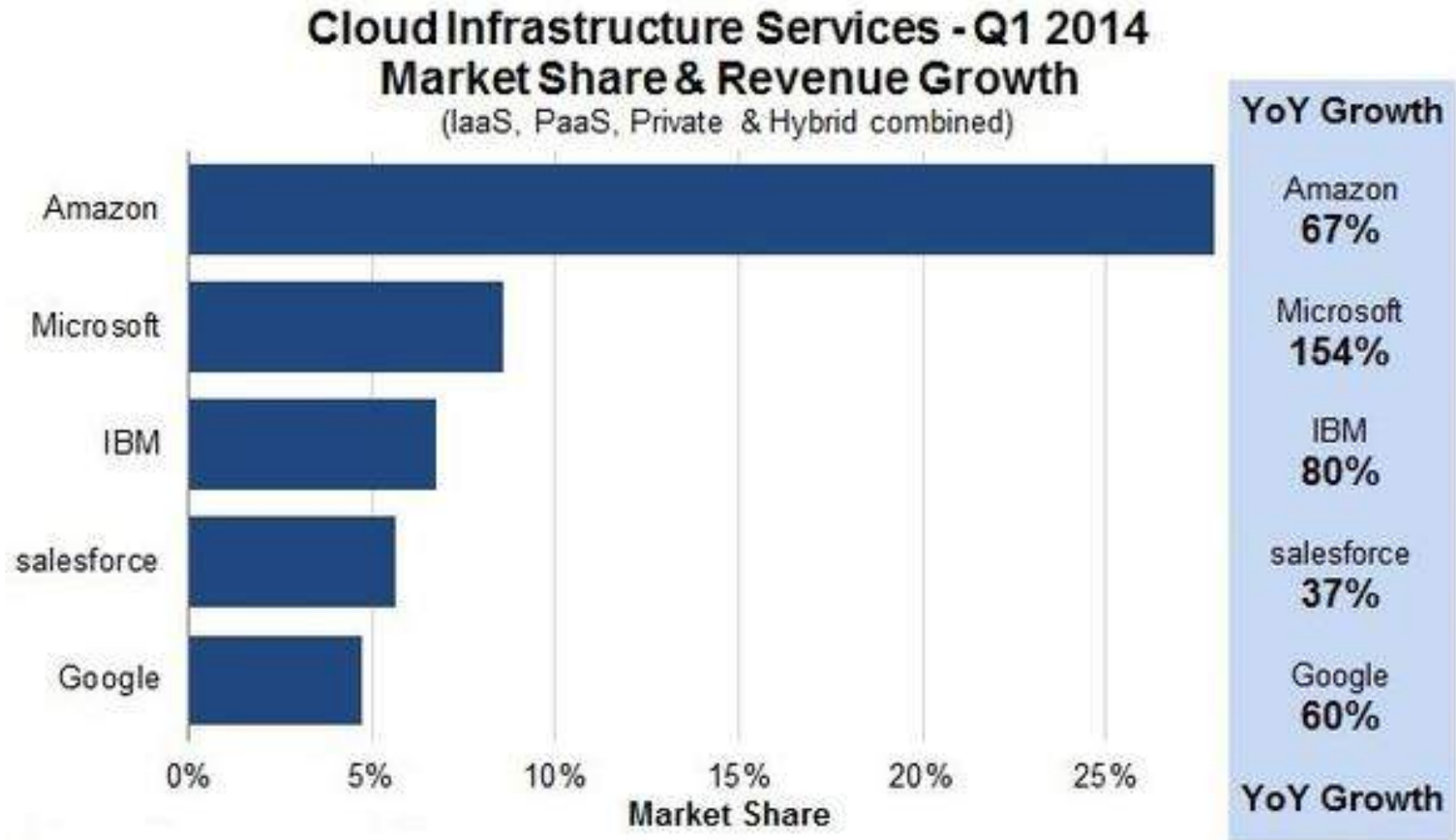
3대 수익원 중 하나로 성장

아마존 AWS



Source: Synergy Research Group

아마존 AWS





목표

‘Not to discount a small number of products for a limited period of time, but to offer low prices everyday and apply them broadly across our entire product range.’



핵심 가치

(Low) Price

Convenience: One Click

Selection: Long Tail



전략

‘To ‘Get Big Fast’ by investing aggressively in new product categories and new businesses, by spending money on brand awareness and getting new customers.’

Attention Economy & Trust

SEO + Update: Attention

Rating Community: Co-Creation & Trust

1-Click: Trust

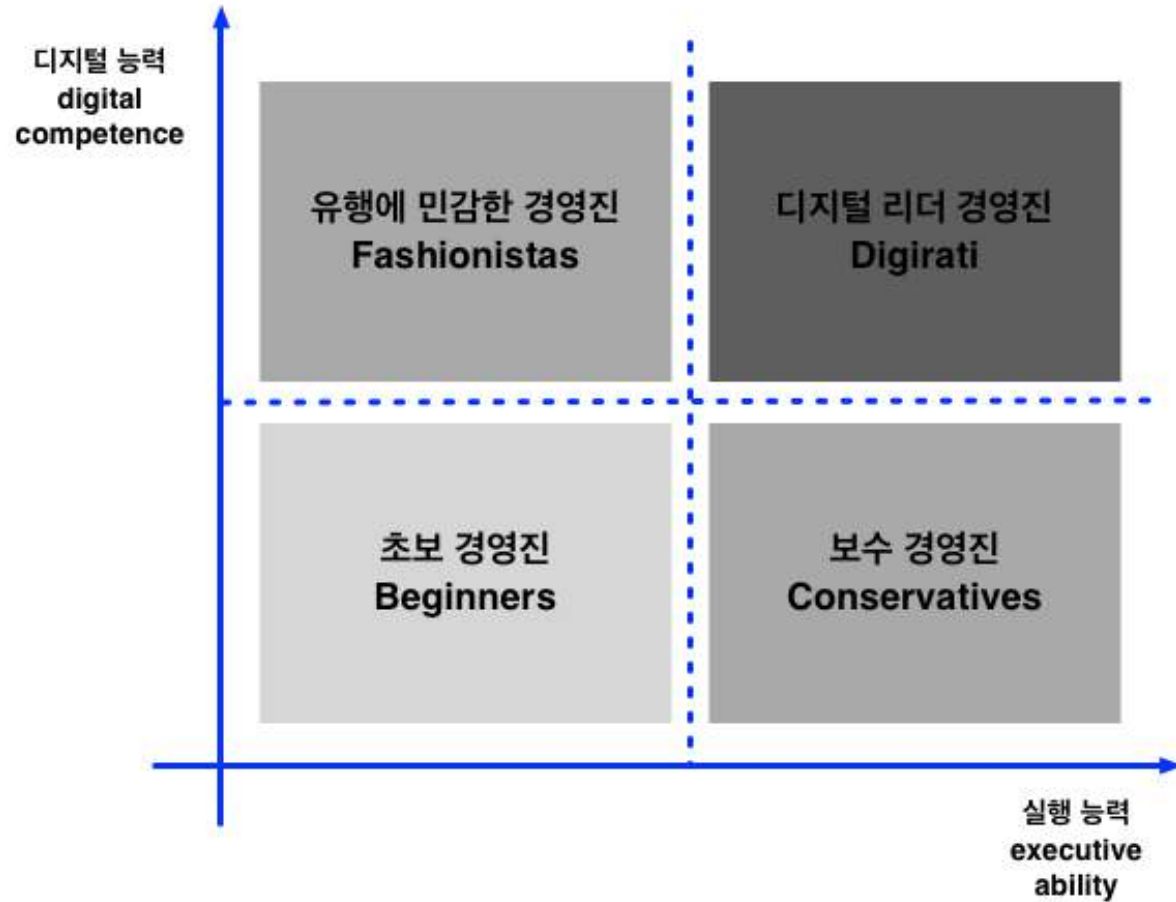
Digital Management Competence

참고자료

**MIT Sloan Management Review(2013),
“Embracing Digital Technology, A New
Strategic Imperative”**

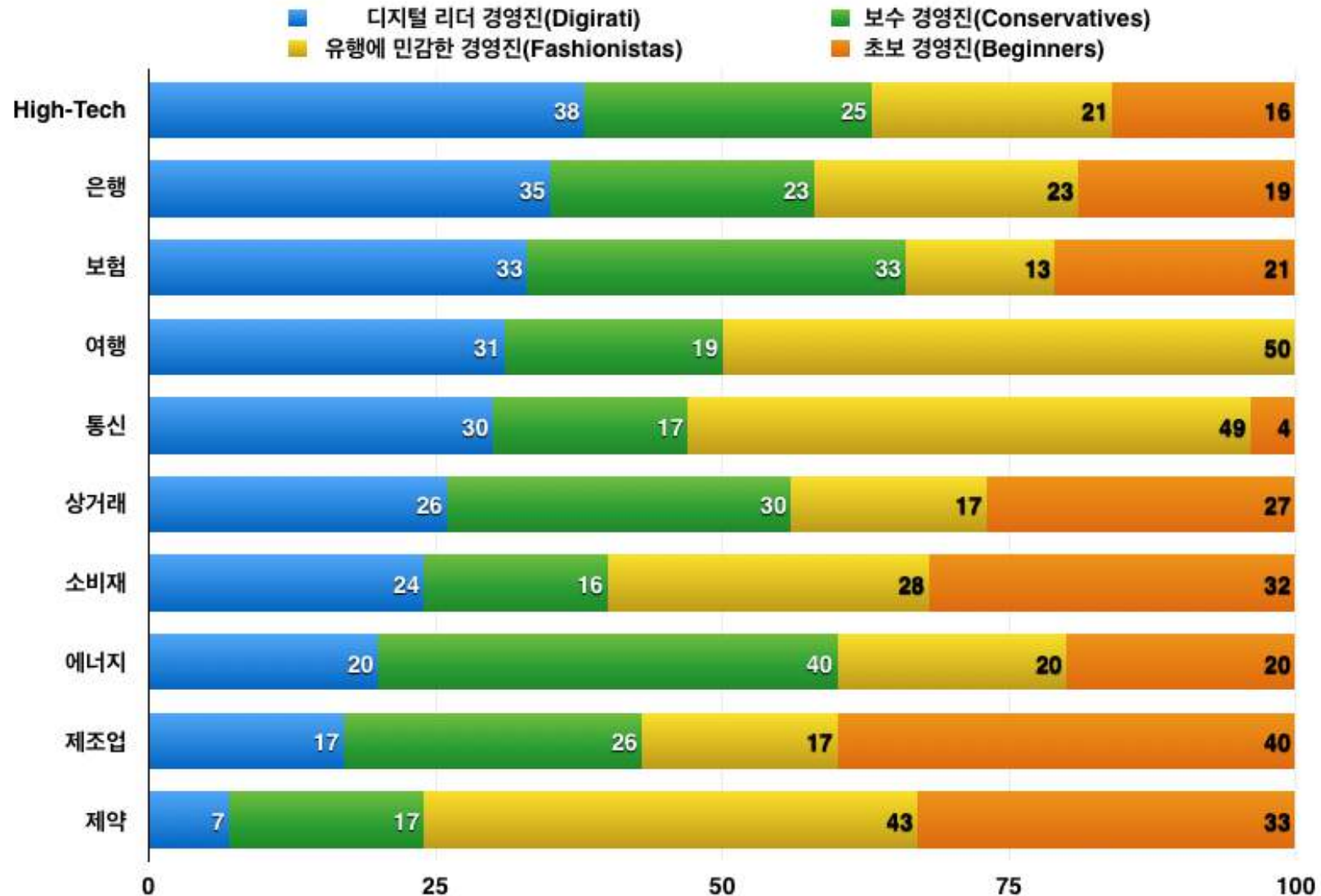
**MIT Sloan Management Review (2012),
“The Digital Advantage: How digital
leaders outperform their peers in every
industry”**

디지털 경영 능력 구분

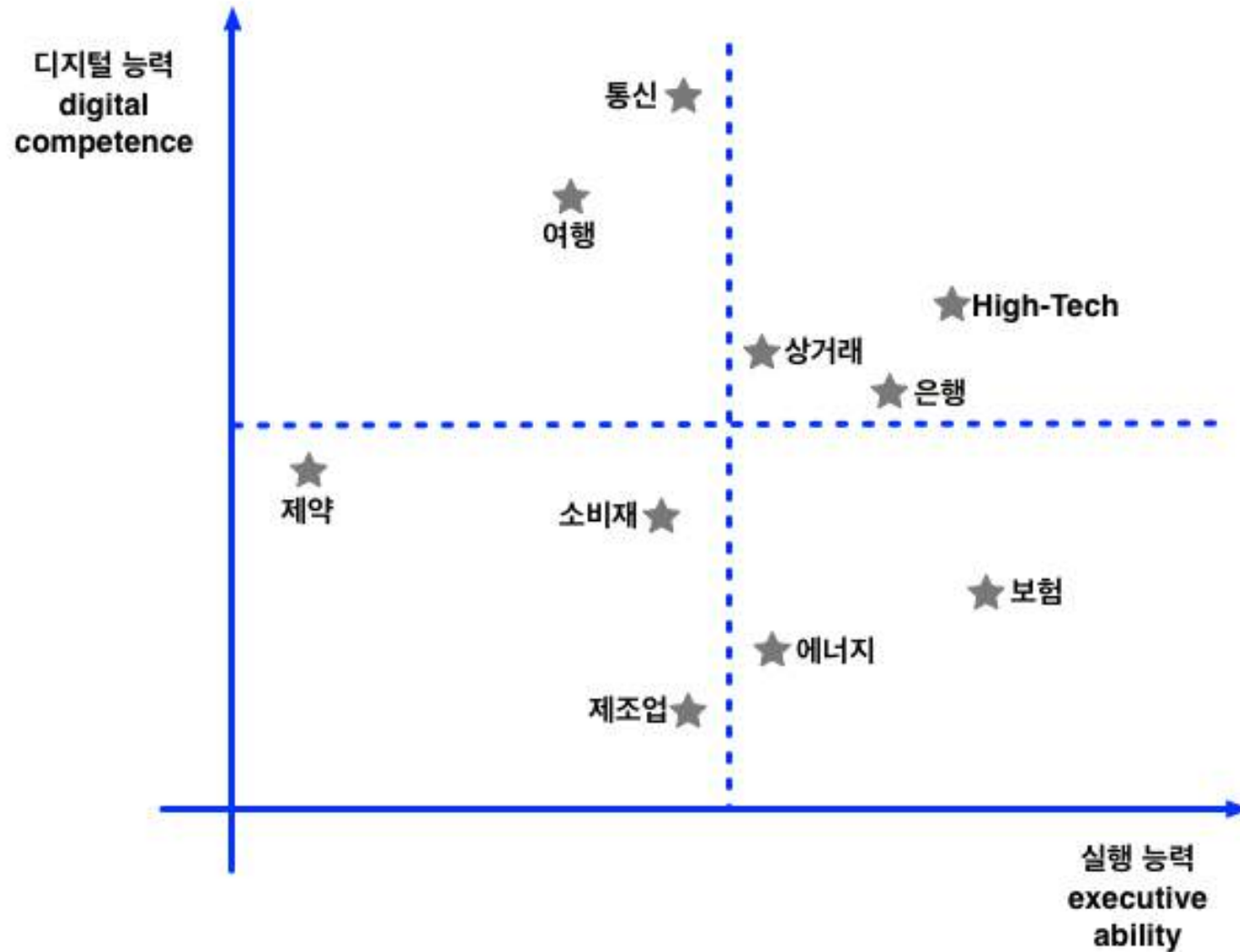


450개 기업, 1,559명 경영진 대상 분석

업종별 디지털 경영 능력

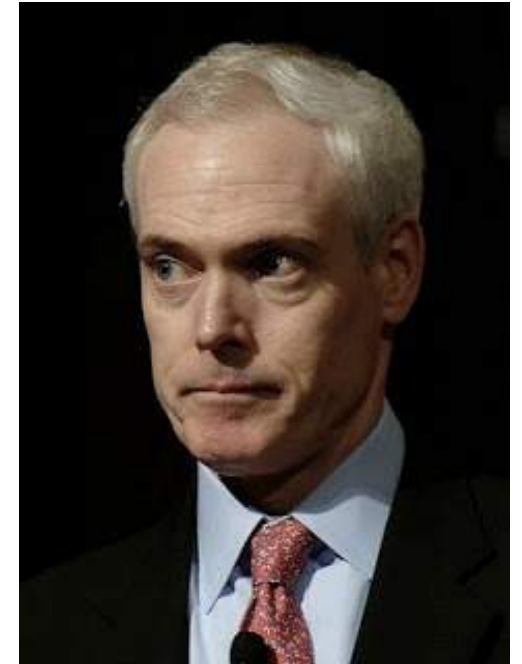
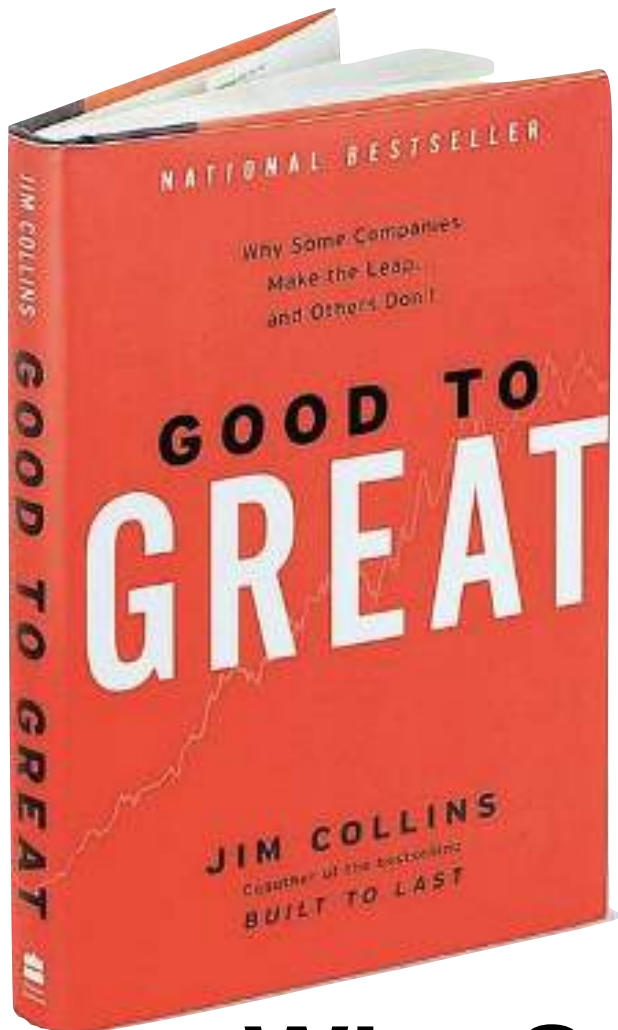


업종별 디지털 경영 능력



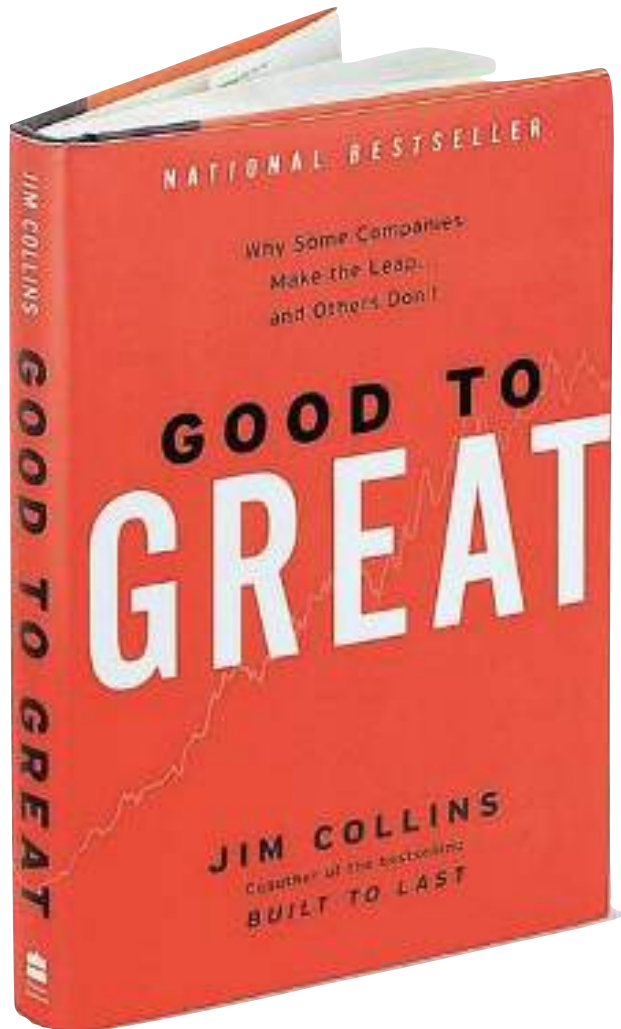
Good to Great

Jim Collins



**Good to Great:
Why Some Companies Make the
Leap... and Others Don't.**

Good to GREAT



BESTSELLER

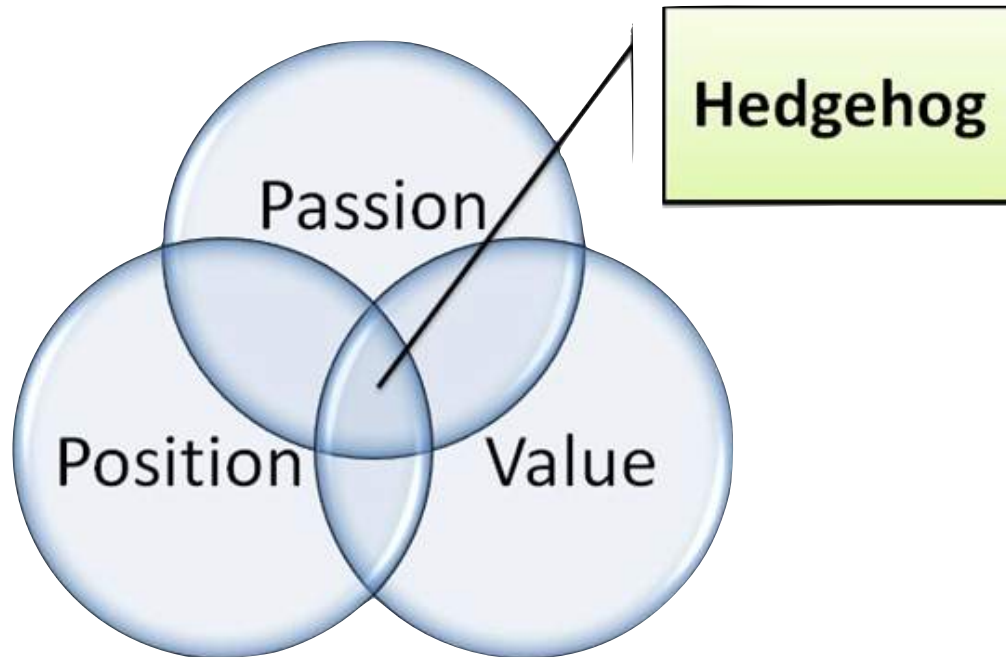
4 million copies

“GREATNESS”

financial performance

**several times better than
the market average**

“Hedgehog”



**Companies should only do
what they can be great at
what makes tons of money.**

“great companies”



Circuit City Stores

“great company”



PHOTO: KEN CEDENO/BLOOMBERG/LANDOV

FannieMae

“great company”



Wells Fargo

“great company”



Philip Morris

BUT!

bankrupt in 2009



Circuit City

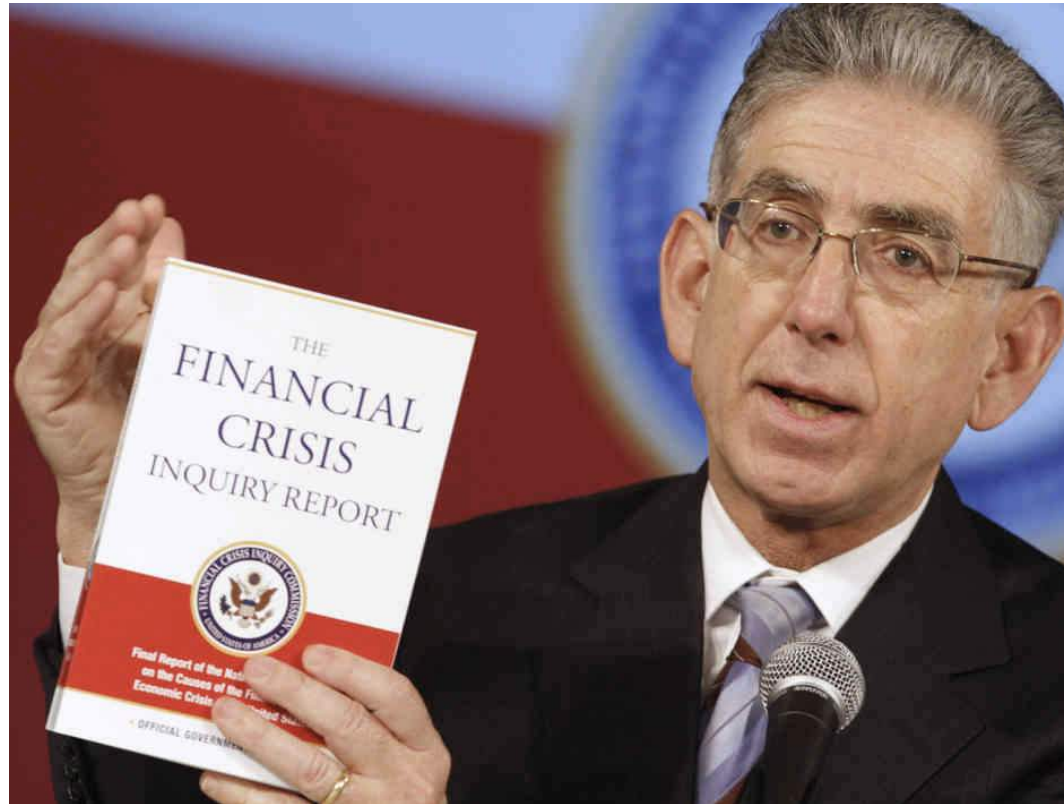
FannieMae Wells Fargo

Mortgage

FRAUD



financial crisis inquiry report



“mortgage fraud... flourished in an environment of collapsing lending standards and lax regulation.”





I pray for the children's
families and for the missing
children. I pray they will

미안합니다
사랑합니다