

# E-Marketplace 모델 및 추진전략

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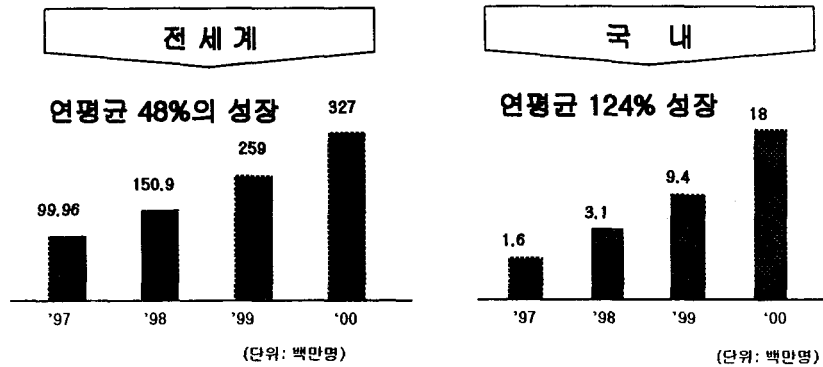
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## 패러다임의 변화 - 인터넷의 고속성장



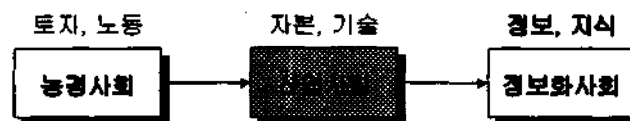
\* 출처: Computer Industry Almanac 99, 11

\* 출처: 정보통신부, SDS 2000.1



## 인터넷 확산에 따른 패러다임 변화

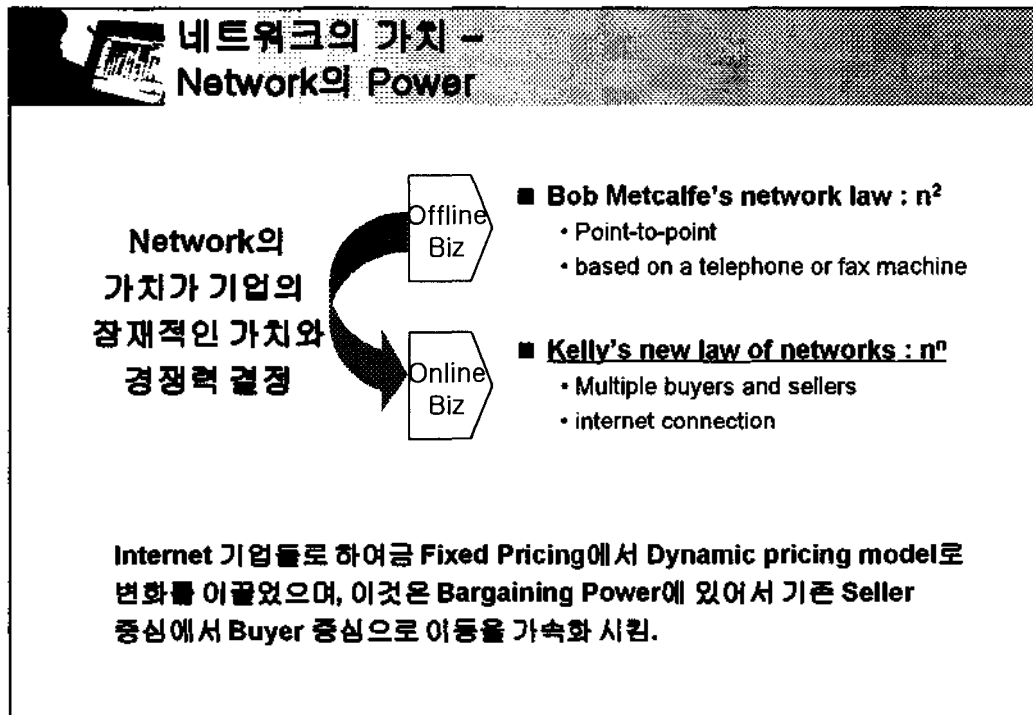
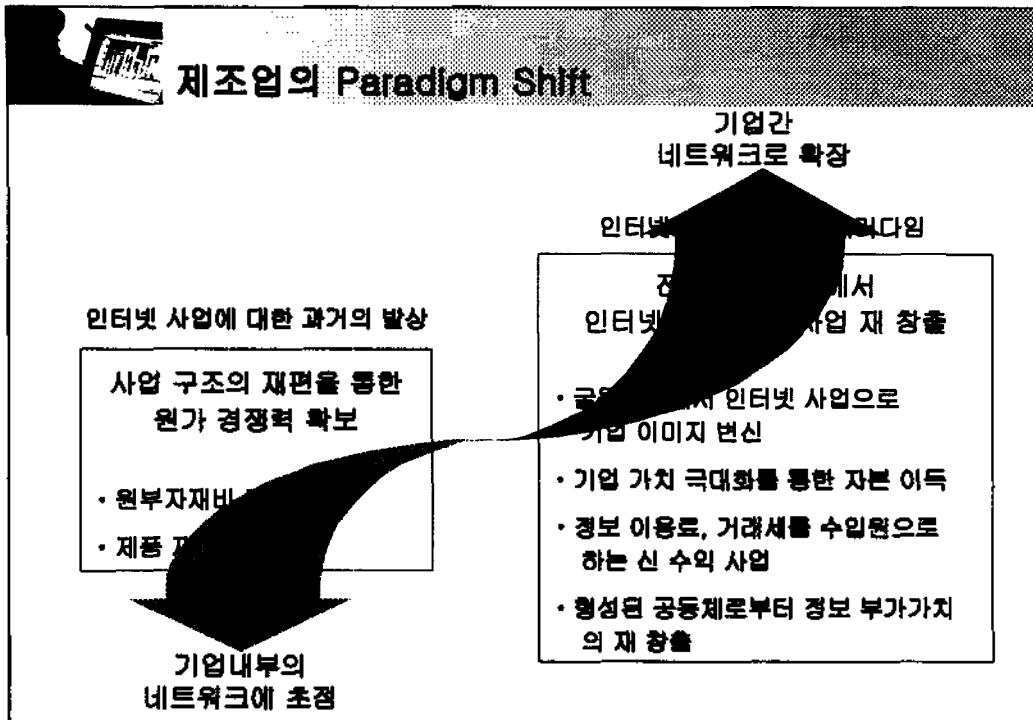
- 인터넷의 급속한 확산은 사회기반 가치의 중심이동을 가속화하고 있음



- 인터넷이 주도하는 정보화 사회는 부가가치의 75%가 정보와 지식으로 부터 창출됨

▷ 산업사회의 강자는 새로운 paradigm을 강요 받고 있음

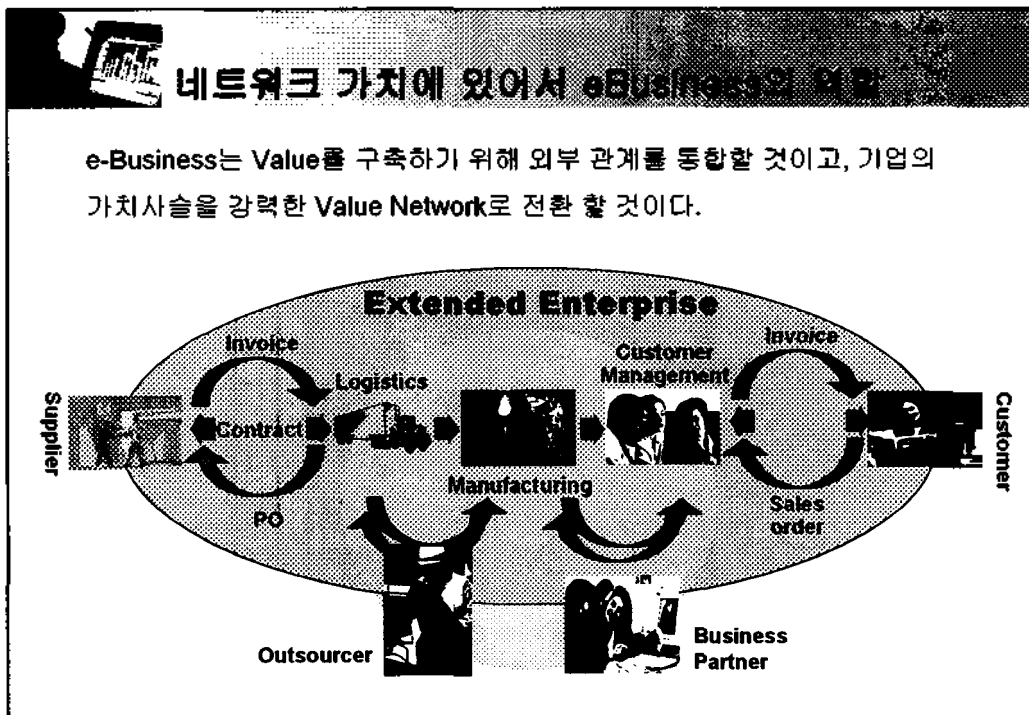






## How Companies Can Create Value During This Shift

- Working more effectively with current partners
  - Deliver rich, real-time information to partners
  - Design products more efficiently
- Extending the reach of your company
  - Sell to new customers
  - Buy from new suppliers
  - Identify and collaborate with new operational partners
- Leveraging shared internet infrastructure
  - Industry templates
  - Connectivity standards (XML, RosettaNet, EDI)
  - Hosted services





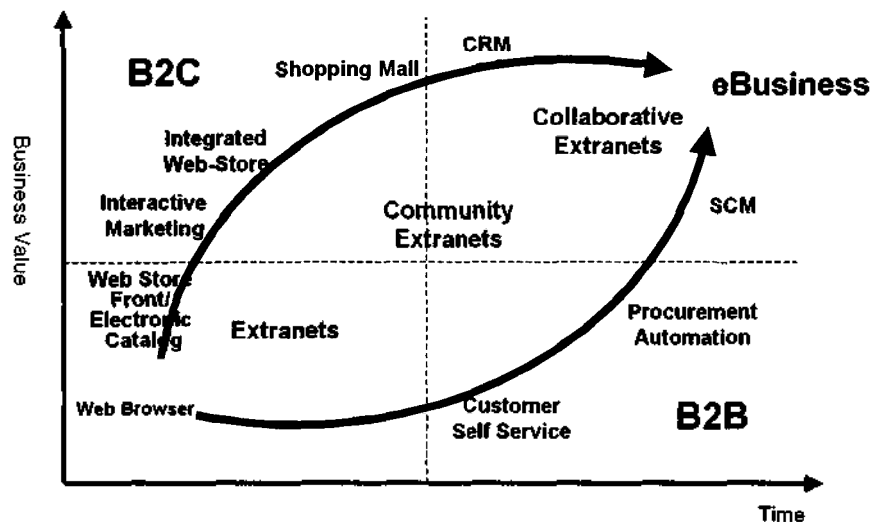


## eBusiness 발전단계 및 모델 - eBusiness 분야

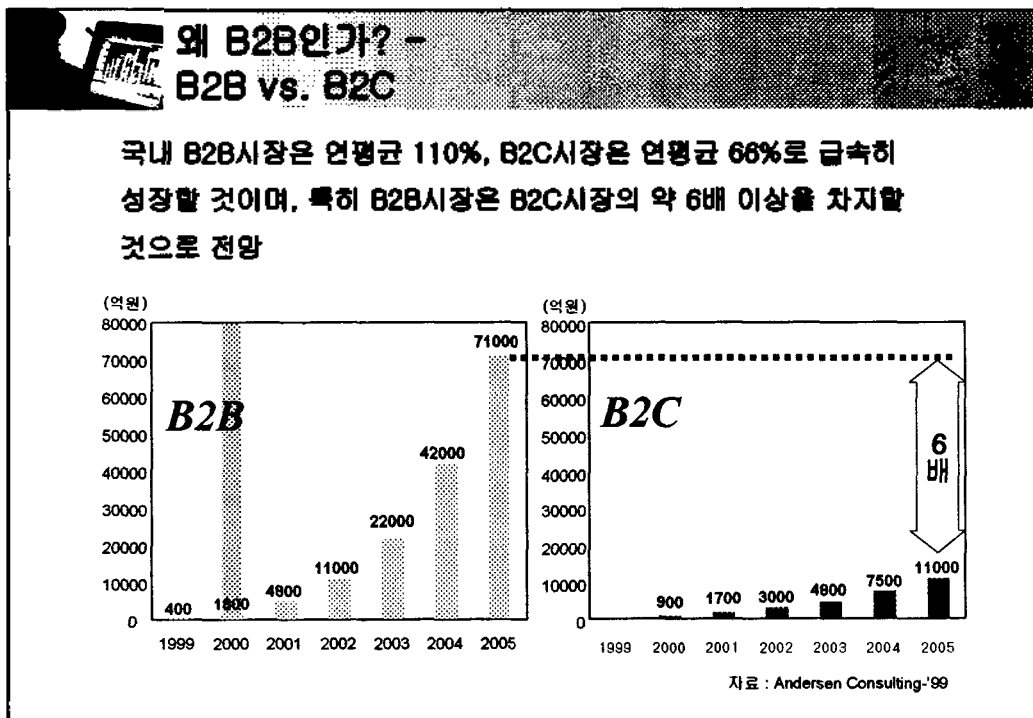
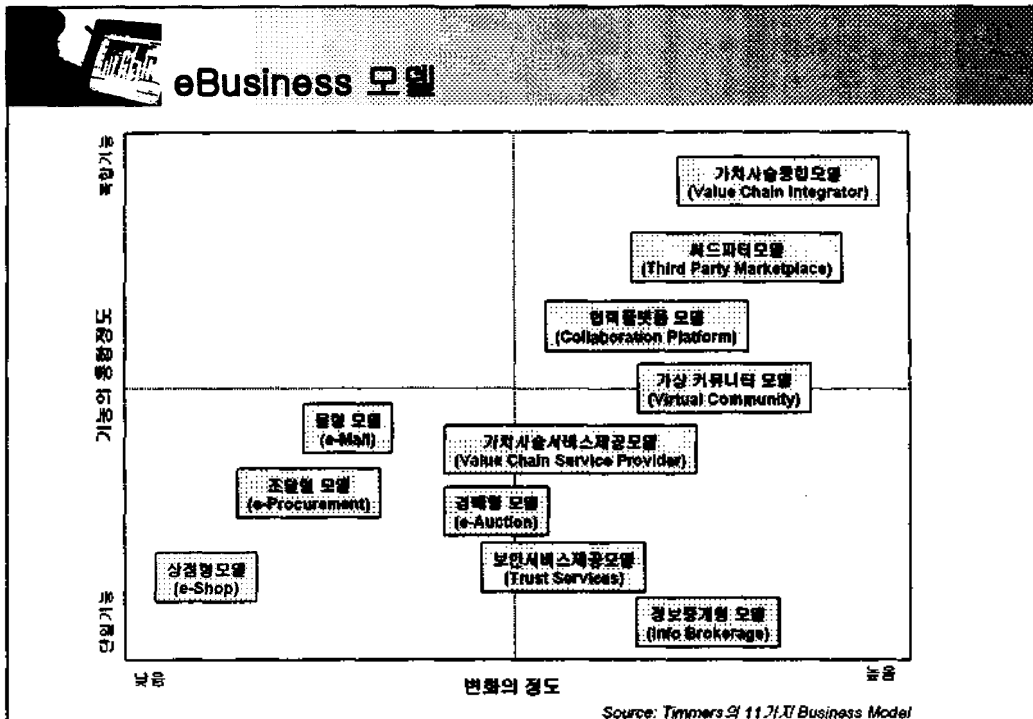
- B2C : Business to Customer (amazon.com)
  - C2C : Customer to Customer (eBay)
  - C2B : Customer to Business (priceline.com : 항공권)
  - B2G : Business to Government
  - B2B : Business to Business
  - P2P : Pier to Pier
- .....



## eBusiness 발전단계





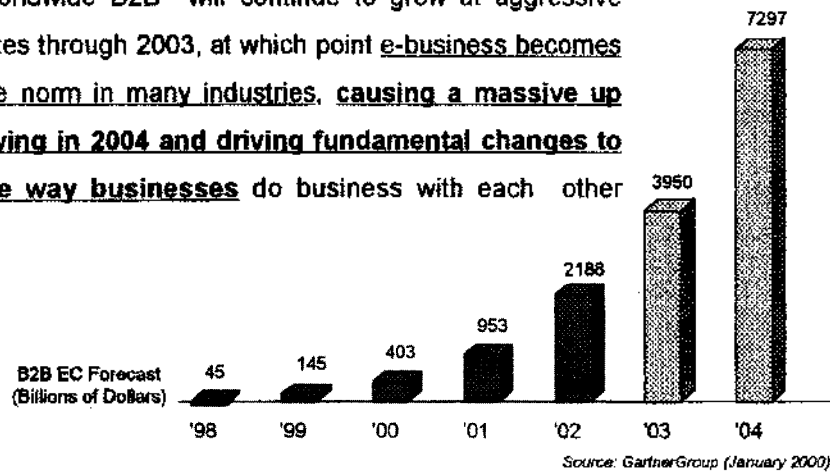




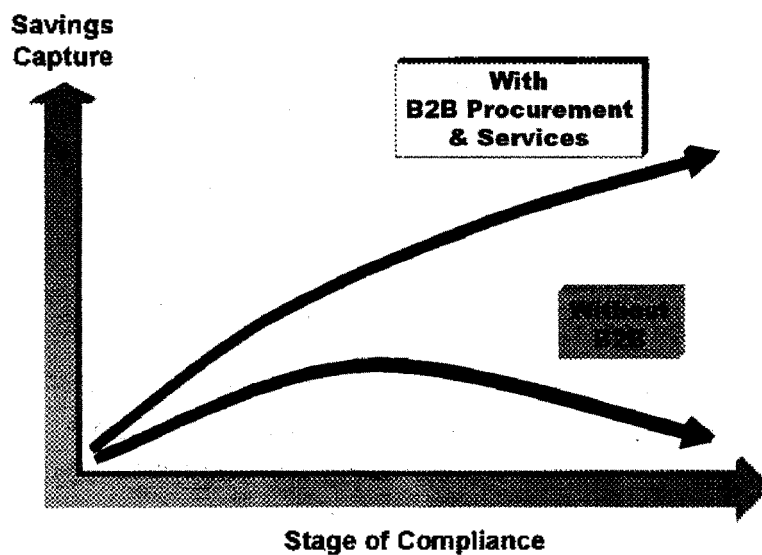


## B2B Market Size – Worldwide

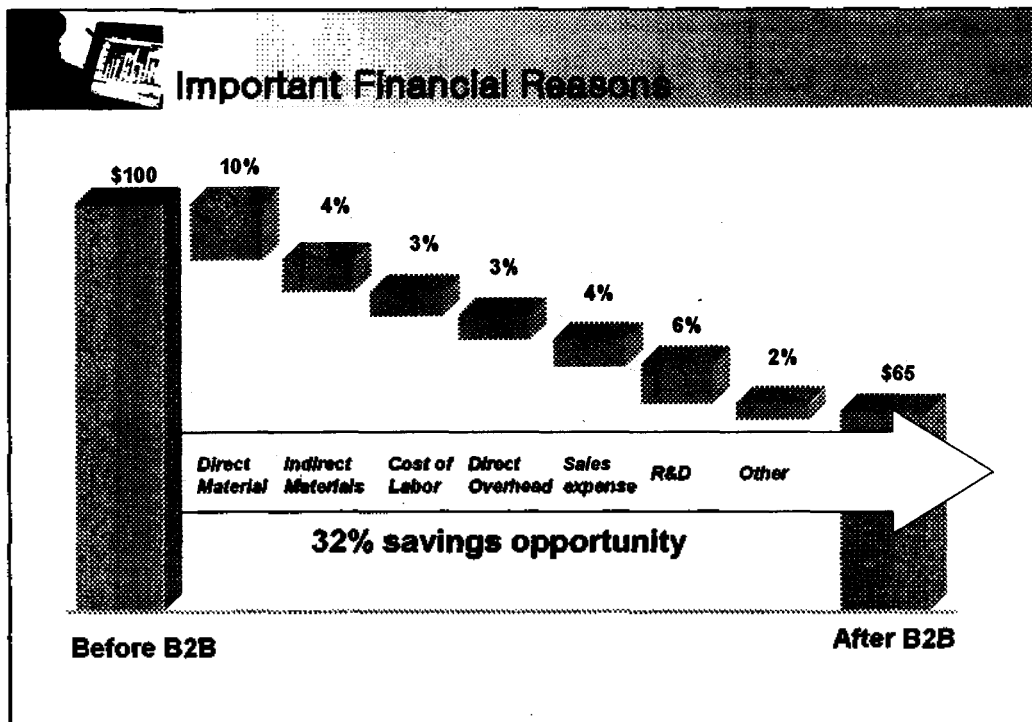
Worldwide B2B will continue to grow at aggressive rates through 2003, at which point e-business becomes the norm in many industries, causing a massive up swing in 2004 and driving fundamental changes to the way businesses do business with each other



## B2B : Last Impact







### B2B 정의 및 분류 -

#### B2B Define : B2B Exchange

- **B2B Exchanges (Marketplace : different B2B e-commerce)**

The unique feature of a B2B Exchange is that it brings multiple buyers and sellers together (in a "Virtual" sense) in one central market space and enables them to buy and sell from each other at a dynamic price which is determined in accordance with the rules of the exchange.
- **B2B e-Commerce (different B2B Exchange)**

B2B e-commerce companies offer products for sale, or seek to procure Products, on-line, but represent only one buyer or one seller so that they do not bring multiple buyers and sellers together.



## B2B Marketplace?

### Personal Workplace

기업별 업무담당자의 작업특성에  
맞는 web화면 및 Application을  
제공함으로써 Internet 상에서  
다양한 형태의 업무지원서비스를  
구현

### Collaborative Marketplace

Internet상에서 Cyber Marketplace를  
제공함으로써 모든 형태의 상거래를  
on-line으로 실현할 수 있는 서비스를  
지원

Buyer



B2B Marketplace



Supplier

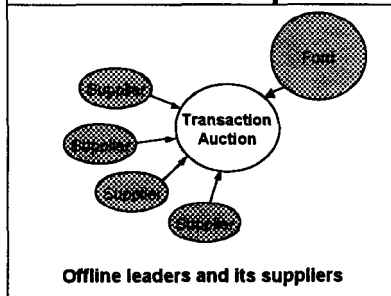


### Optimized B2B Process

기업간의 한계를 넘는 Supplier와 Buyer간의 비즈니스 환경을 구성하고,  
이를 바탕으로 기업간 최선의 대안을 찾을 수 있는 비즈니스 프로세스를  
제공

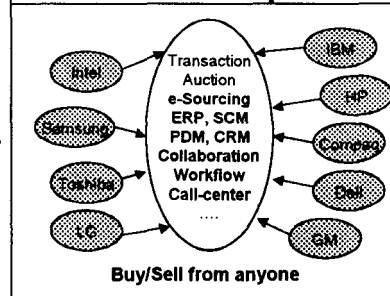
## B2B Classification : Private vs. Public

### Private Marketplace



VS.

### Public Marketplace



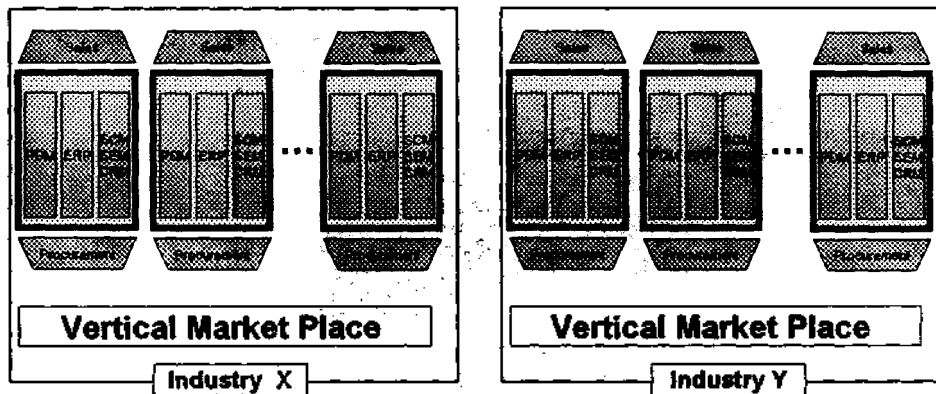
Private marketplace is just another "automation"  
True value of B2B marketplace is being created by "Public Trading"





## B2B Classification : Horizontal vs. Vertical

### Horizontal Market Place



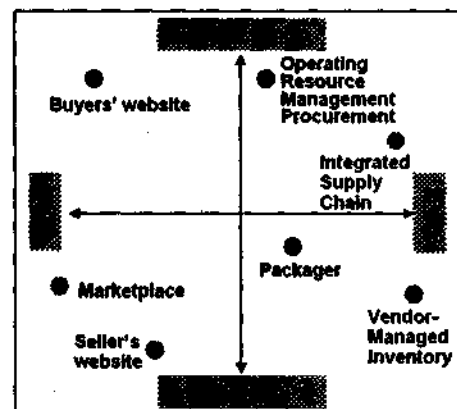
## B2B 모델 - B2B 사업성격 및 기업간 관계의 이해

### 사업성격

- 판매자 중심 : 기업이 다른 기업을 대상으로 website를 통해 상품, 서비스, 그리고 정보를 제공하는 전자 Shop
- 구매자 중심 : 기업의 필요한 것을 다른 기업에 공급함으로써 구입하려는 "구매자중심의 시장"

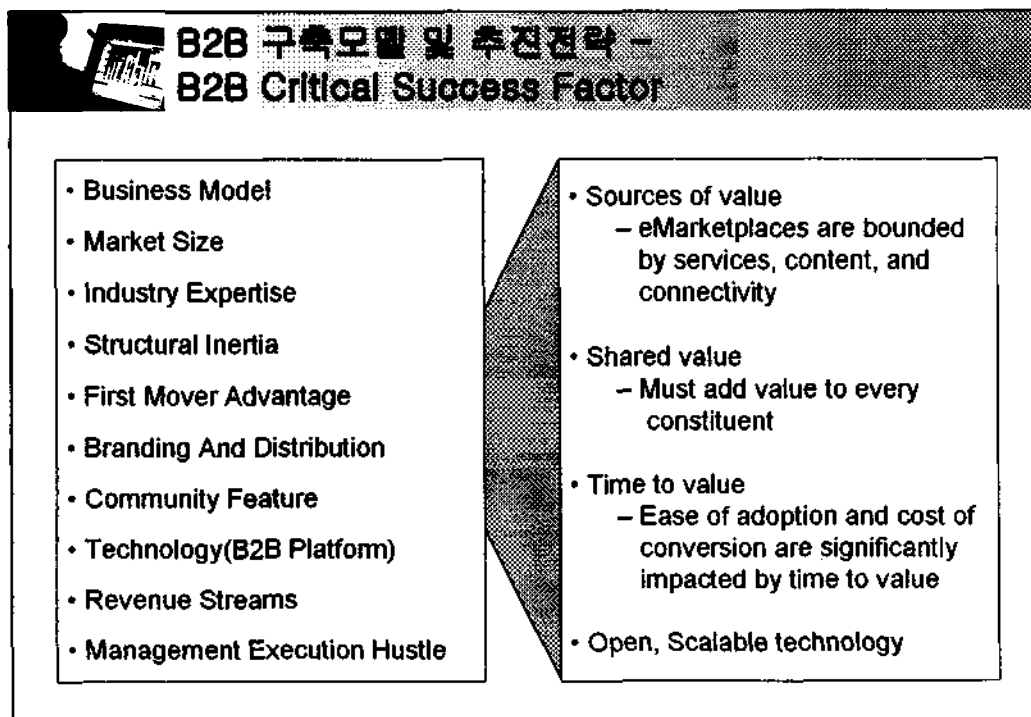
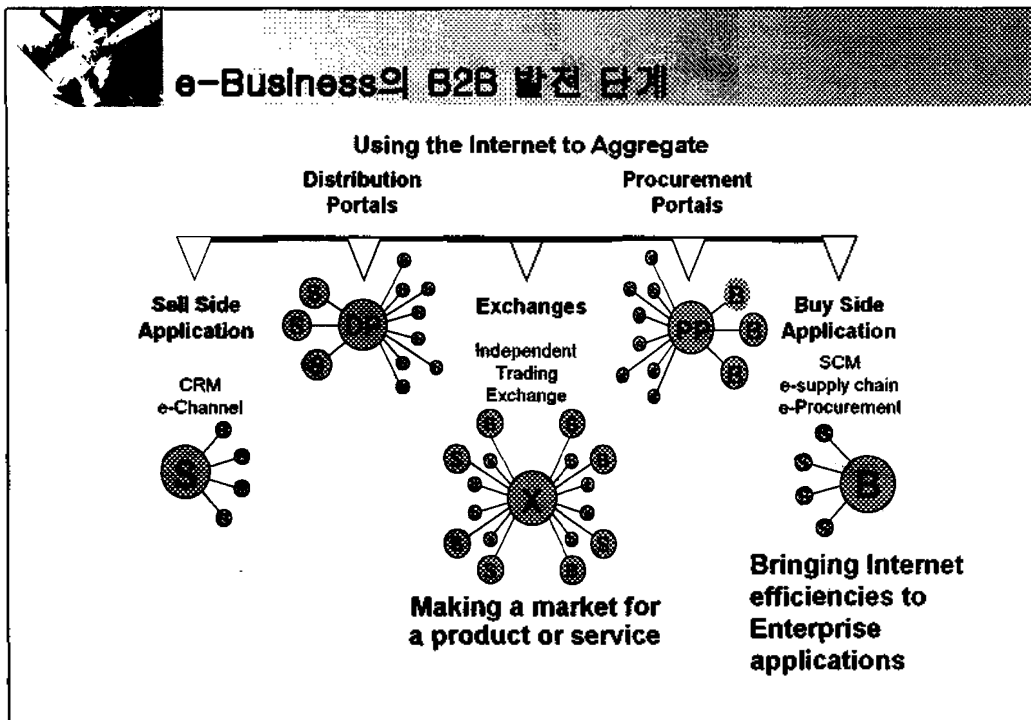
### 기업간 관계 성격

- 경쟁적 : 관련 기업들은 거래에 있어 자신에게 유리한 흥정을 원하고 협력관계형성에는 관심이 적음 (경쟁입찰 사업)
- 협조적 : 반복되는 거래에 있어 지속적인 협력 관계를 형성하기 위해, 둘이상의 기업들이 지식, 시장예측, 어떤 경우에는 정보시스템을 공유함 (VAN 사업 등)



자료 : Dataquest (1999.11)









## B2B 구축모델

### ■ End-User-Driven Models(driven by industry stakeholders)

- **Demand-side alliances** : Industry feeling significant pressures to improve supply chains to cut costs and gain efficiencies with a propensity to act collectively (automotive industry & high-tech manufacturing industry)
- **Dominant end users** : Industry segment with large enterprises feeling significant supply chain or competitive pressure with a propensity to invest in IT (financial service industry & mass-market retail industry)

### ■ Vendor-Driven Models(driven by IT vendors independent of demand-side alliances and dominant end users)

- **Vendor-driven marketplace(JV)** : Industries where vendors perceive sizable consulting and system integration opportunities with portal participants (Chemical industry & consumer packaged goods manufacturers & healthcare)
- **Vendor-driven portal** : Industry segments in which there is a high degree of industry fragmentation (Not follow-on opportunity related to consulting and system integration, but value-added services)



## B2B 구축모델 : Comparison

	Dominant End User	Demand Alliance	Vendor-Driven MP: JV	Vendor-Driven Portal
Level of Industry Segment Fragmentation	Low to medium	Low to medium	Low to medium	High
Propensity of Industry to Invest in IT	High	High	Low to medium	Low to medium
Target Market	Financial services, mass-market retail, apparel manufacturers	Automotive, high-tech manufacturing	Chemical, CPG manufacturers, health care	CPG retailers, nurses, niche verticals

Source: Dataquest (November 1999)





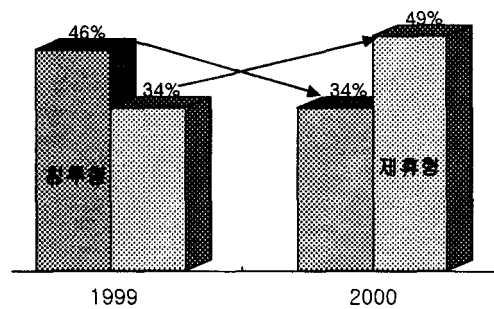
## B2B 추진전략 : 침투형 vs. 제휴형

### ■ 침투형(실리 추구)

- 기업 내 각 사업부문에서 가능한 부분부터 착수 후 점차 확대
- 기업이미지보다 경비 절감, 신규 고객개발 등의 실질적 효과 초경

### ■ 제휴형(스피드 중시)

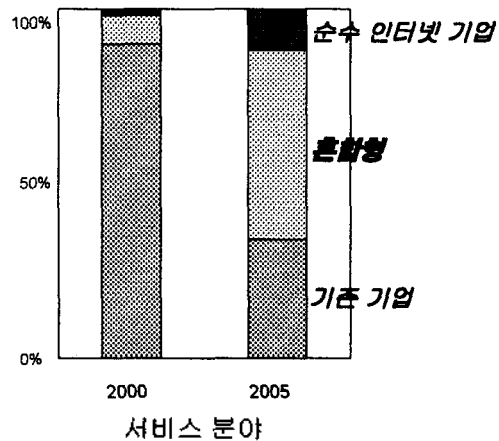
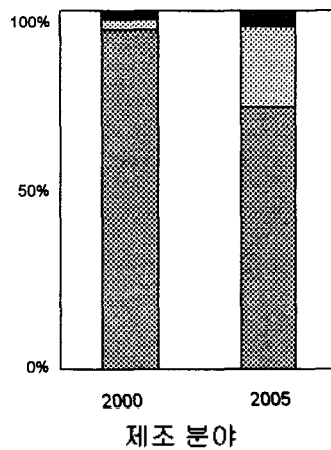
- 인터넷 전문기업과 제휴하여 신속히 추진
- 인터넷 전문기업의 스피드를 활용한 사업 전개의 스피드화



Source : Informationweek 1999.12



## B2B 추진전략 : 순수 인터넷 기업 vs. 기존 기업



Source : Informationweek 1999.12





## B2B 추진전략- 추진조직

사업부문이 개별적으로 조직

Web전문기업과 제휴

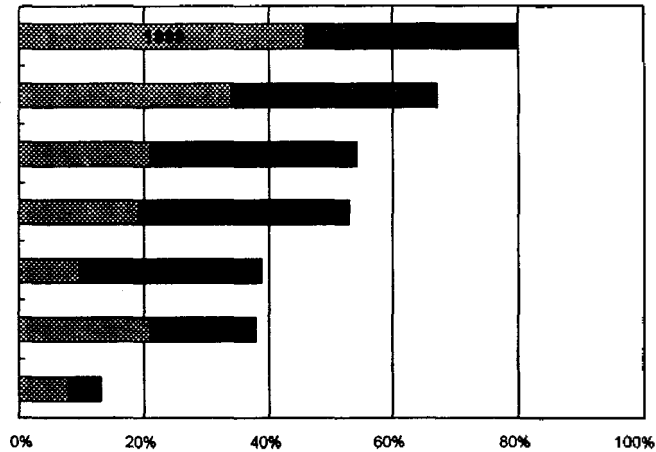
Web전문부문을 창설

업계의 추진단체 가맹

Web전문 부문을 분사

신용기업에 투자 (합작)

사업을 Web상해 이관



Source : Informationweek 1999.12



## B2B's General Revenue Model


일반적으로 B2B사업의 수입은 주로 Web상에서 이루어지는 거래, 광고, 경매, 입경, 가입, 정보서비스 등에 대한 수수료(Fee) 형태로 발생함.

- Seller transaction fee (74% ▶ 84%)
- Fees for data or analysis (18% ▶ 74%)
- Marketing Fee(Advertisement) (32% ▶ 56%)
- Revenue from other sites (18% ▶ 56%)
- Custom storefronts for suppliers (26% ▶ 44%)
- Buyer Transaction Fees (32% ▶ 40%)
- Seller Subscription fee
- Buyer Subscription fee

(source : Forrester, Feb. 2000)




## B2B 솔루션 - FEB vs. Innovation Solution



**FEB Solution**  
(Faster, Better, Cheaper)

VS.



**Innovative Solution**


- Traditional Paper Model Solution과 대비되는 개념으로 Online 및 Information Access의 자동화를 지원
- 비용절감, 운영효율 향상에 초점
- 이미 존재하는 비즈니스 프로세스와 솔루션을 포함한 Traditional System의 통합 및 Basic web-programming

- 비즈니스 모델의 확장 및 새로운 기회를 통한 비즈니스 모델 창출
- 새로운 마켓에서의 경쟁적인 이익 및 고객에 대한 "Value-add"에 초점
- 솔루션과 Digital Consulting이 결합된 형태로써, Web-based tech.(package, custom) 통한 Business Model-making 및 Reengineering, Business/Brand 전략, Package Implementation, Custom Application 개발, Traditional Sys. 통합 및 투자지원

## Solution Requirements : Holistic Solution

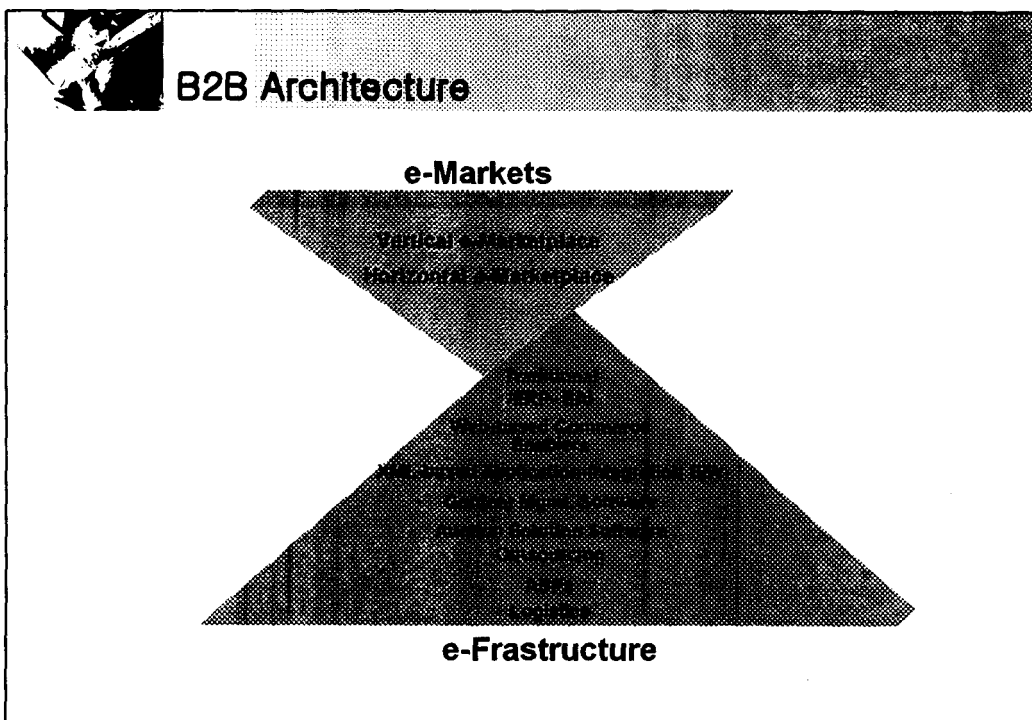
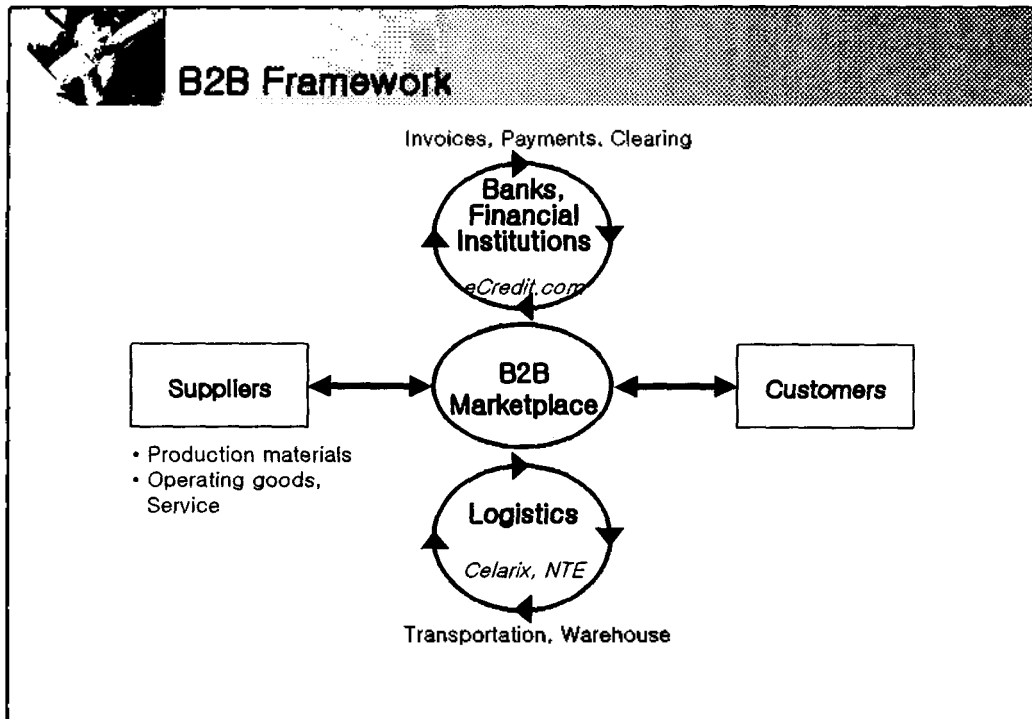
**"Because most companies fail to capture the true costs of fulfillment, many delude themselves into thinking their Web commerce transactions are profitable."**

**"Web commerce involves end-to-end business processes. Companies need to place just as much focus on the back-end processes as on the front-end processes"**



Source : Gartner Group, April, 1999

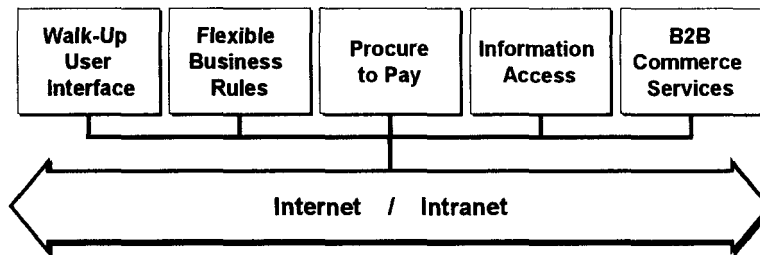




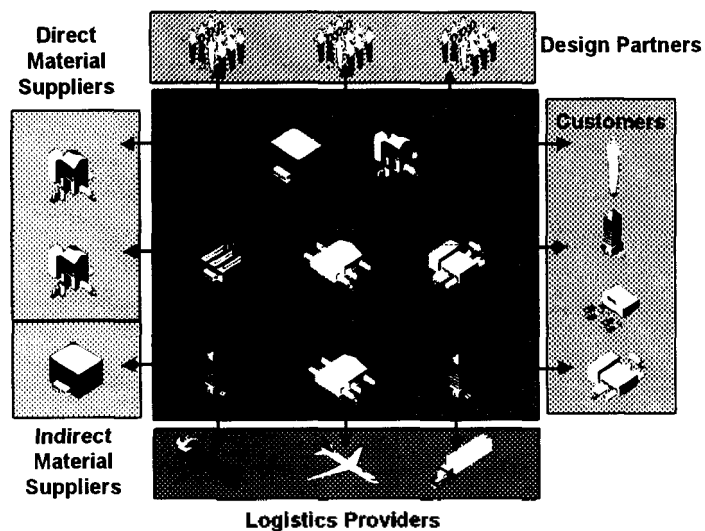


## Solution Requirements

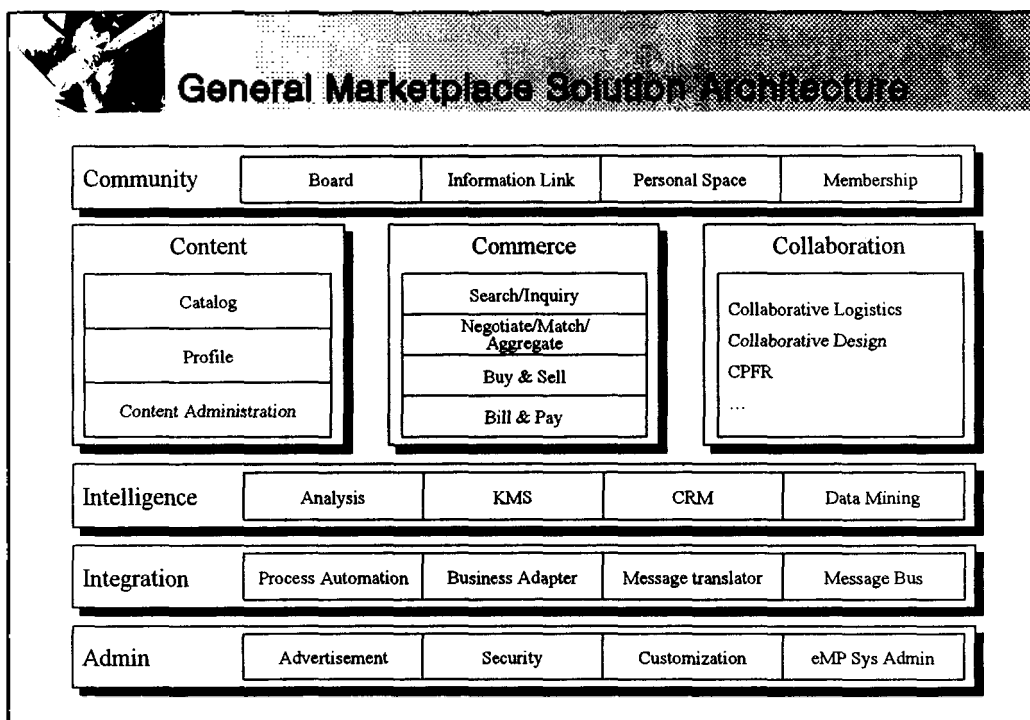
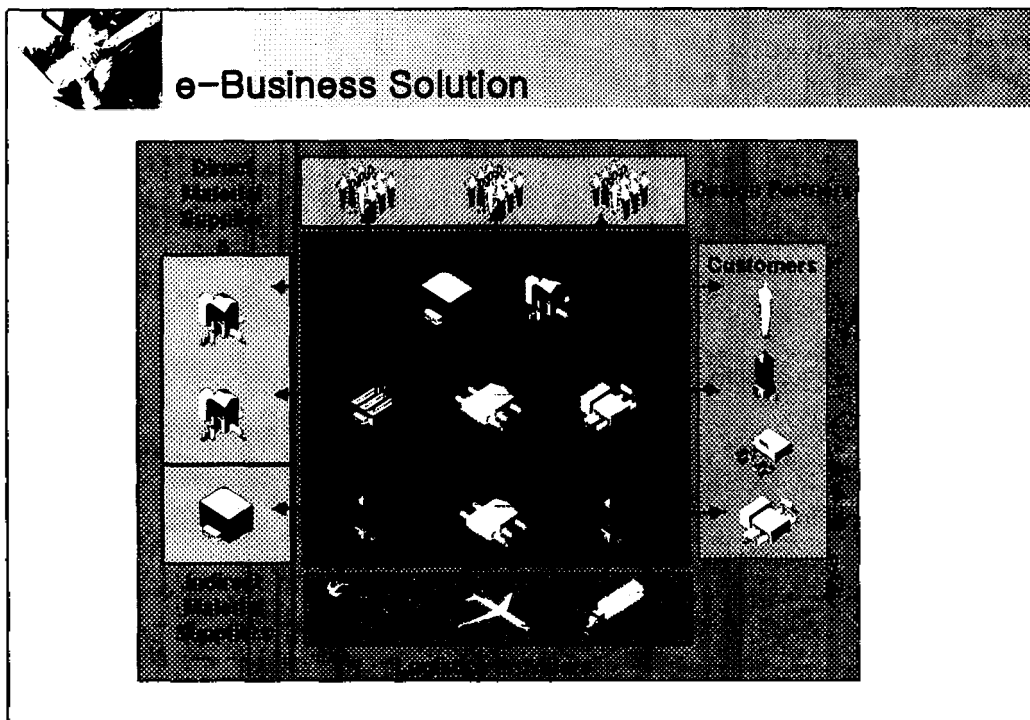
- **Mirror your business**
  - Organization
  - Business processes
  - Multiple catalog sources
- **Sophisticated**
  - Complete requisition to pay functionality
  - Intelligent reporting
- **Minimum expense**
  - Easy to use shopping experience
  - No IT headaches



## e-Business and the Enterprise











## B2B Marketplace Solution Function

### For Collaborations and Value Added Service

- **Order Entry** – order capture with applicable discounts and substitute products
- **Sourcing of Products** – certifying suppliers and obtaining committed volumes and discount
- **Order Fulfillment** – transaction settlement, track and trace
- **Transportation Management** – merge in transit ; cross docking ; consolidation, and diversion. Shipping optimization via real-time integration with transportation exchange
- **Purchase Profile** – historical purchase data; convenient reorder
- **International trade logistics, customs, duties, tariffs; compliance check; landed cost analysis and export document production.**



## B2B Marketplace Solution Function

- **Contracts Management** – terms and conditions, renewals, volume agreements, compliance
- **Product Lifecycle Collaboration** – joint design processes, advanced part change notification, effectively dates, transition planning
- **Regulatory Filing** – coordinated across supply chain
- **Planning** – high-level supply chain design and warehouse positioning
- **Scheduling** – production scheduling and optimization across multiple partners
- **Forecasting** – demand, production, and promotion responses
- **Asset Management**– tracking, MRO, depreciation schedules





## B2B Marketplace Solution Function

- **Meta Catalog/Content Management** – multi-vendor catalog rationalization, SKU mapping and resolution, part substitution and suggestion
- **Electronic Bill Presentment and Payment**
- **Community Functions** – news, job postings
- **Escrow Warranties ; Risk Management**
- **Receivables Management**
- **Performance Management** – best and worst delivery record, quality, rework across the trading community
- **Reverse Logistics** – demand, production, and promotion responses



## B2B Marketplace Solution Function

- **Payment Reconciliation**
- **Scrap Processing** – efficient disposition of scrap material into the marketplace
- **Interactive Online Selling** – product configuration; validate viable configuration of option for each order; tie in availability and substitutes from multiple vendors; comparative product analysis
- **Integrated, multi-vendor Order Processing**
- **Application Hosting**
- **Complex Pricing** – negotiated rates; volume discount; promotions; tiered pricing; future pricing with effectively dates; multiple price lists; quote management and status





## B2B Marketplace Solution Function

- **Digital Certificate Management**
- **Inventory Availability – capable to promise; available to promise across Multiple suppliers**
- **Clearing Service**
- **Payment Processing – payment system integration and settlement; credit line check and reservation; cost code analysis**
- **Carrier Notification and Acknowledgement**
- **Bill of Material Explosion/Confirmation – routing separate line items in a single order to multiple suppliers and handling fulfillment; confirming delivery and status agreement and status**



## B2B Marketplace Solution Function

- **Procurement Workflow Rule**
- **Content Filtering**
- **Comparison Shopping**
- **Feasible modeling and scenario planning**
- **Derivative Tools – forward contracts, option on commodities and Manufacturing Capacities**
- **Market Intelligence – benchmarking**
- **Personalization/Profiling of Customers and Market Segments**





## B2B Marketplace Solution Function

- **Channel Management Service** – lead sharing; warranty registration
- **Fulfillment Modeling** – across customer, seller, and product hierarchy to forecast impact of pricing changes and product configuration change
- **Wire Service**
- **Link to other Exchange** – e.g. transportation capacity exchange
- **Quick Pay Service (take receivable) to Increase Liquidity**
- **Uniform Customer entitlements across all customer channels** – benchmarking
- **Anonymous Inventory Posting** – take title



## B2B Marketplace Solution Function

- **Private-label Exchange Services** – hosting partner communities
- **Route Optimization**
- **Integration with back-end-systems** – support for rich data transfer with major ERP systems; support of native APIs(Application Programming Interfaces)
- **Trade Credits**
- **Education and Training** – multimedia training of complex processes; how-to videos tied to product configuration process
- **Factoring Service**





## B2B Marketplace Solution Function

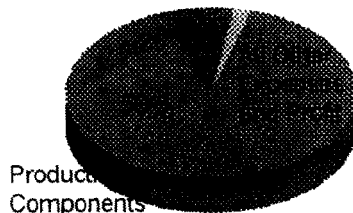
- **Specialized Market Making** – auction, reverse auctions, consortium purchases, Program buys, and contract buys.
- **Buyer and Supplier Profile Validation**
- **Affinity Programs**



## Enormous Impact of B2B

### Manufacturers

MRO Supplies



Production Components

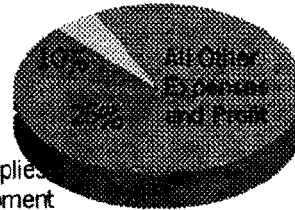
### Service Organizations

2% Office Supplies

5% Office Supplies

Services

MRO Supplies and Equipment



## Business Impact of Next Generation B2B Solutions

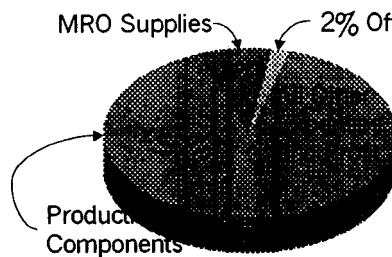
Business Objective	New B2B Capability	First Gen.	Next Gen.
Reduce Ordering Cost	Transaction Automation	X	X
Reduce Inventories	Collaborative Planning		X
Reduce COGS	Spend Aggregation		X
Reduce OpEx	Spend Aggregation		X
Speed Product Devel.	Design Collaboration		X



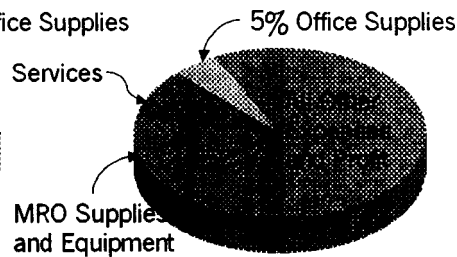


## Biz Impact of Next Generation B2B Solutions

### Manufacturers



### Service Organizations



Business Objective	New B2B Capability	First Gen.	Next Gen.
Reduce Ordering Cost	Transaction Automation	X	X
Reduce Inventories	Collaborative Planning		X
Reduce COGS	Spend Aggregation		X
Reduce OpEx	Spend Aggregation		X
Speed Product Delv.	Design Collaboration		X



## B2B 추진동향 - 국내 B2B 추진현황

### ■ 국내 시장 난립이 상당 기간 지속 예상

- 대기업의 개별 Portal (B2B e-Commerce)
- 조합/협회 중심의 Portal
- 중소 독립 B2B Portal
- 해외 대형 Portal
- 컨텐츠 구축

### ■ 오프라인 기업의 독자적인 B2B 시장 진출 및 Click-to-mortar의 B2B Player간 전략적 제휴 가속화

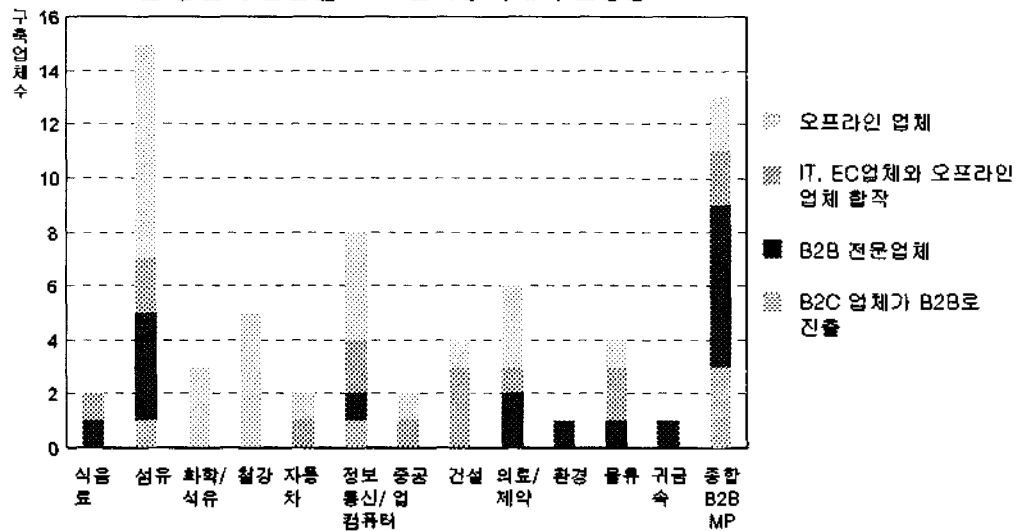
- B2C 업체가 B2B 업체로 진출 (7.6%)
- B2B 전문업체 (25.6%)
- IT 및 EC업체와 오프라인 업체 합작 (22.7%)
- 오프라인 기업 진출 (43.9%)

Source : 전자상거래연구조합, May, 2000



## 국내 B2B 산업별 추진현황

2000년 상반기 산업별 B2B 전자상거래 추진동향



Source: 전자상거래연구조합, May, 2000

## 국내 B2B 추진전망

- Intermediary의 비중 지속 : Data or analysis을 통한 Information Service 강화
- Vertical Portal의 증가 : 기존 기업과 전략적 제휴를 통한 확장
- Workplace 및 Collaboration 기능 강화 : Process Automation 및 기업간 협력 강화
- 마케팅 비용 증가 : Brand Power, 선점경쟁
- B2B Marketplace 구축비용 증가 : 경쟁력 확보를 위한 부가서비스 기능 확충
- 기술적으로 기존의 EDI는 퇴조, XML 부상 및 JAVA가 핵심기술로 부상
- 인터넷 서비스의 통합 (Convergence) : 무선인터넷의 성장
- Web Hosting 사업의 부각 : ASP 사업 성장
- 기업용 솔루션의 시장 확대 : SCM, Web ERP
- Internet Marketing의 성장 : FMO(Fusion Marketing Online), CRM, Ad. 성장





감사합니다.....

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