

經營學碩士學位請求論文

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**An Empirical Study on the Impact of the Maritime E-Commerce
on the Role of the Ocean Freight Forwarder**

指導教授 崔在洙

2001年 2月

韓國海洋大學校 大學院

海運經營學科

金東煥

Abstract

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Abstract

An Empirical Study on the Impact of the Maritime E-Commerce
on the Role of the Ocean Freight Forwarder

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Department of Shipping Management
The Graduate School of Korea Maritime University

There has been a few studies on how electronic commerce based on the NII(National Information Infrastructure) will change the structure of the industry and the market. Most of studies generally agree that NII can reduce transaction costs. However, an argument on the effect of the NII on the structure of the industry are divided into two groups. One is that the traditional intermediaries will be eliminated in the move to create direct producer-consumer links(Disintermediation) due to reduction of transaction costs, the other is that the intermediaries won't be eliminated, but will appear in the new forms(Cybermediaries) due to the new needs that electronic commerce imposes on producers and consumers. Especially several social and institutional factors may mitigate against the elimination of intermediaries.

This arguments can be applied to the liner shipping industry. The intermediary such as ocean freight forwarder in the liner shipping industry can be threatened by the advent of electronic commerce companies. The aim of this paper is thus to examine whether the role of forwarder as traditional intermediary will be eliminated or reinforced in the process that the liner shipping market moves to electronic market. The theoretical background was included in this paper by conducting a literature survey and the present condition of electronic commerce in the maritime industry was reviewed.. Also a questionnaire survey was carried out for the purpose of this study.

The summaries of this research are as follows :

First, maritime electronic commerce has enough capability to replace a role

of the traditional forwarder. Maritime electronic commerce is emerging in almost all areas of the industry and in a electronic market all attendants are able to deal maritime resources they want.

Second, the current ratio of using maritime electronic commerce is relatively low because the integration of the system between the system of independent personal users and that of maritime electronic commerce service companies has not been made.

Third, the transaction cost theory and 'Disintermediation' are proved in this paper. It is found in this study that the traditional role of the forwarder as the intermediary in the liner shipping industry can be weakened or even eliminated by the introduction of the maritime electronic commerce.

Finally, this study also found that the non-economic factors such as the social and institutional factors in the market would mitigate against the elimination of intermediaries. The liner shipping industry has traditionally formed the complicated business relationships between the intermediaries and transport service providers. In fact the non-economic factors exist in the liner shipping industry. Therefore it can be said that although electronic commerce systems become more sophisticated, those systems can not reflect the complicated business relationships completely.

In conclusion, this study proved ironically both the disintermediation argument and the opposite one. It shows that at the present the traditional forwarders and the maritime electronic commerce are in the competitive relationships and on the balance of power. The role of the traditional forwarders seems to be more reinforced in the future, considering the conservative characteristics of the trading mechanism and non-economic factors in the liner shipping industry.

1

1

IT .1)

가

가

가 , e-business

가

가

가가

가

(value chain)

가
Malone

1985 Porter & Millar²⁾

"unit cost"가

.3)

-
- 1) , , , “ ”, 「
」,2000-18 , LG , p.5.
 - 2) Porter, M. E., and Millar, V. E., "How Information Gives You Competitive Advantage," *Harvard Business Review*, July-August 1985, pp. 149-160.
 - 3) Malone, T., Yates, J. and Benjamin, R. "Electronic Markets and Electronic Hierarchies", *Communication of the ACM*, Jun 1987, pp. 484-497.

mediary)' 가 . 가 ' (inter (value chain) , (disintermediation)

Benjamin Wigand 가 (value chain)

가

.⁴⁾ Bakos

가

.⁵⁾

, Saker, Butler and Steinfield 'electronic network'

"cybermediaries"

.⁶⁾ Bailey and Bakos(1997)

13 Case Study

"disintermediary"

가

.⁷⁾

4) Benjamin, R. and Wigand, R. "Electronic Markets and Virtual Value Chains on the Information Superhighway", Sloan Management Review, Winter 1995, pp. 62-72.

5) Bakos, J. "A Strategic Analysis of Electronic Marketplaces", MIS Quarterly, September 1991, pp. 295-310.

6) Sarkar, M. B., Bulter, B. and Steifield, C. "Intermediaries and Cybermediaries: A Continuing Role for Mediating Players in the Electronic Marketplace", Journal of Computer-Mediated Communication, 1996.

7) Joseph P. Bailey and Yannis Bakos, "An Exploratory Study of the Emerging Role of Electronic Intermediaries", International Journal of Electronic Commerce, Volume 1, No. 3, Spring 1997, pp. 7-20.

가 (value chain)
가 (value chain) Forwarder()
NVOCC(), Shipping Agent()가 (intermediary)
가
trading mechanism
mechanism 가
가 (disintermediation) ,

2

가 ()
가

3

(Liner Shipping Industry)'

가
' (Freight Forwarder)' 가
, Documentation
가 (value chain)

trading machanism

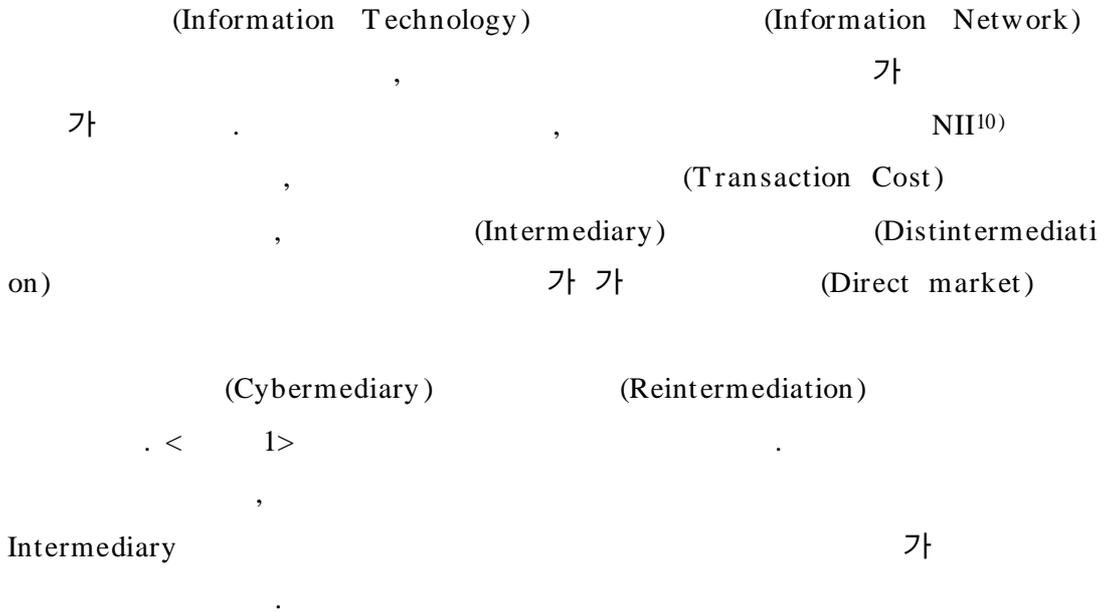
가
가
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,8)

2000 8
846 9) 300
2000 9 1 30
MS

'Microsoft Excel 2000'
가 가

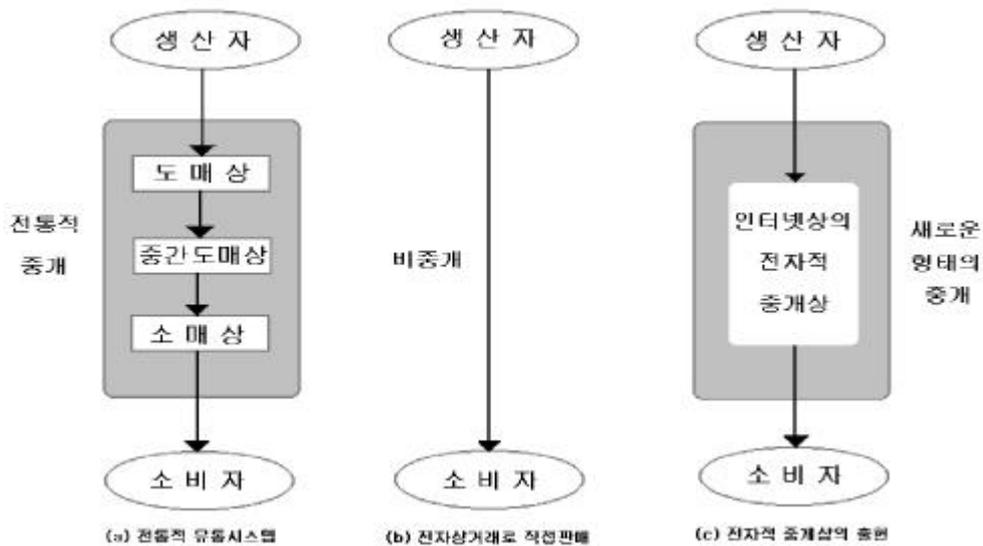
8)
9) <http://www.kiffa.or.kr/member/>

2



< 1>

11)



10) The National Information Infrastructure. The proposed communications network that will interconnect all aspects of society and telecommunications. Commonly known as the Information Superhighway.

11) E. Turban, Jae Kye Lee, D. King and M. Chung, Electronic Commerce: A Global Perspective, Prentice Hall, 1999.

1

(Disintermediation)

1. Stigler 12)

가 가 가

가

0 가

가

가

가

가

2. Coase¹³⁾ Demsetz¹⁴⁾

가

12) Stigler, George J.(1961), "Information Economics", *Journal of Political Economy* LXIX (3): pp.213- 225.

13) Coase, R.(1937), "The nature of the firm" *Economica*, 4(November), pp.386-405.

14) Demsetz, Harold(1968), "Transaction Cost", *Quarterly Journal of Economics*, LXXXII: pp.33-53.

가 가 .

가 .

3. Malone, Yates, and Benjamin 15)

가 (Electronic Hierarchy) 가 (Electronic Mark
 et) 가 가
 . - - 가
 , - - 가
 EDI .
 가 .
 가

4. Bailey 16)

“ ” “ ”
 가 .
 . < 2>
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(Supplier):

15) Malone, Thomas W., Joanne Yates, and Robert I Benjamin(1987), "Electronic markets and electronic hierarchies : Effect of information technology on market structure and corporate strategies", *Communications of the ACM*, 30 (6), pp. 484-497.

16) Bailey, Joseph P, "Intermediation and Electronic Commerce". MIT.

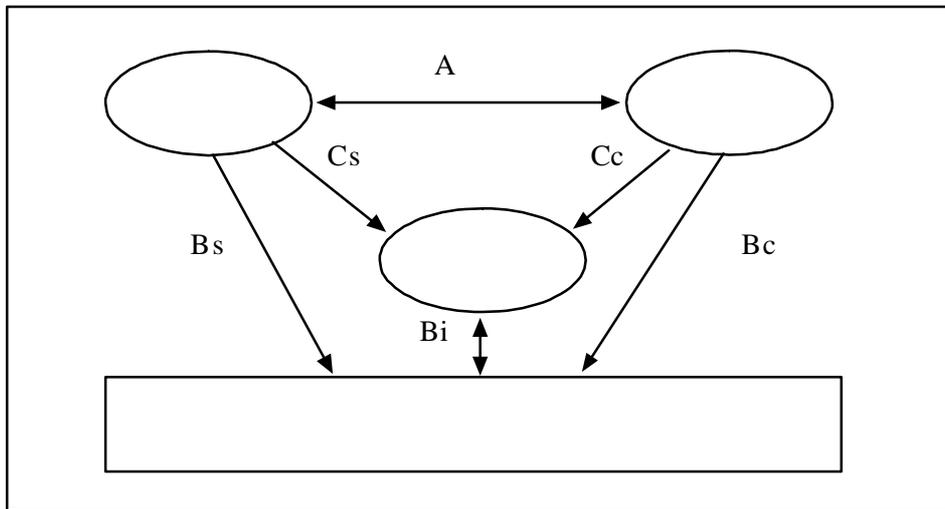
(Custom):

(Intermediary):

가 가 가
가 .

(Infrastructure):

< 2 >



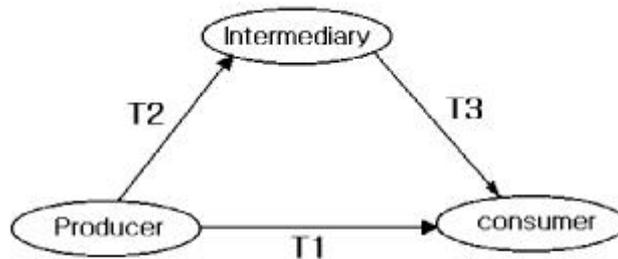
< 2 >

“A”
 “Cs, Cc” . 가
 (“Bs, Bc”) (“Bs, Bi, Bi, Bc”)가
 . “Cs,
 Cc” “A” (“Bs, Bi, Bi, Bc”
 “Bs, Bc”).
 가 .

1. Sarkar, Butler, and Steinfield 17)

Sarkar, Butler, and Steinfield

< 3>



Possible Transactions Between Producers, Consumers, and Intermediaries, T1, T2, T3 = Transaction costs

Benjamin and Wigand NII가 18) 가

가 1: NII

'0'

17) Sarkar, M. B., Butler B., & Steinfield. C.(1995), "Intermediaries and cybermediaries: A continuing role for mediating players in the electronic marketplace", *Journal of Computer-Mediated Communication*, 1(3).
 18) Benjamin, R. and Wigand, R. "Electronic Markets and Virtual Value Chains on the Information Superhighway", *Sloan Management Review*, Winter 1995, pp. 62-72.

가 2 : .()

'0' 가 1 가 .
0
가 . 가 1 .

가 1` (가 1) : NII 0 (T*)

T 1, T 2, T 3 Pre-NII 19) . T 1`, T 2`, T 3`
Post-NII 20)

Pre-NII Intermediary가 , T 1 > T 2 + T 3 가
. , Post-NII

$$T 1` = T 2` = T 3` = T *$$

$$T * = T 1`
T 2` + T 3` = 2T *
T 1` < T 2` + T 3` .$$

, Post-NII Intermediaries ,
가 . 가 1`

$$T *$$

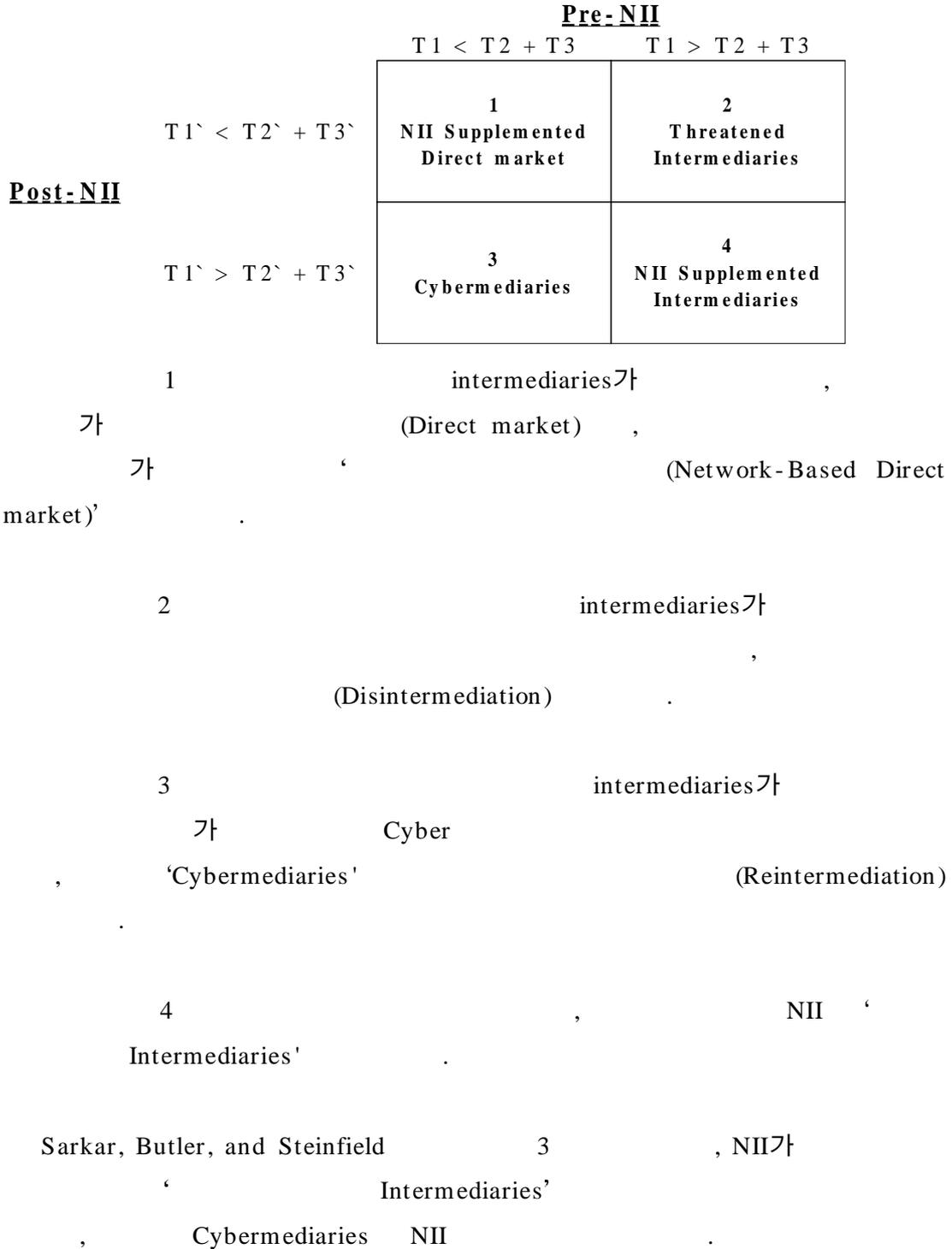
$$T 1` = T 1*, T 2` = T 2`, T 3` = T 3`* T 1`* T 2`* T 3`* , < 4>$$

19) NII가 ' ,
20) NII가 ' ,

< 4>

(T*)

4가



(T2) Portal (yahoo., EInet Galaxy),
The All-Internet Shopping Directory),
Frhohwein's ISDN Technical Page),
, Virtual Reseller,
Sarkar, Butler, and Steinfield
(Producer-centric structure)

(T3) NII
(Cybermediaries)

2.

(1) Gellman 21)

가

가 가

가

“ ”

21) Gellman, Robert(1996), "Disintermediation and the Internet", *Government Information Quarterly* 13 (1): pp.1-8.

(2) Kalakota and Whinston

Kalakota and Whinston

가 가 가 ,
,22)

(3) Bollier

Bollier 1996 ' 4 Aspen
Institute ' ' , 가

22) Kalakota, Ravi, and Andrew B. Whinston(1996), "Electronic Commerce World",
MA: Addison -Wesley.

3

1

1.

가
 가 .
 가
 (UNCITRAL)²³⁾
 “ (EDI), , ,
 ,
 ” (1 , 2).
 , (Electronic Commerce
) (Electronic Data Interchange: EDI), , PC , ,
 , , 가
 .
 “ ”
 , , , , , , , ,
 , , IT , , 가
 .

Portal

23) 1966

on on International Trade Law :UNCITRAL)

가
 (United Nations Commissi-
 . UNCITRAL GATT, WTO
 ,

가

2.

(1) Business to Business (B2B:) .

가

. , , , , .

가 <

1> (Supplier-Oriented Marketplace), (Buyer-Oriented Marketplace), (Intermediary-Oriented Marketplace)

가 (mall) , 가

가 가

가 .

< 1> 24)

가 .

24) . . . , 『 』 , p.286.

(2) 가 (Vertical Electronic Marketplace) .

가 (Electronic Marketplace)

가 .²⁵⁾ 가

가 B2B . , 가

가

가

,

가

가

. 가

(Vertical) 가

(Horizontal)

가

(Vertical) 가

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. 가

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(Horizontal) 가

가

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가 MRO(Maintenance Repair & Operation)

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‘

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‘

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가

,

가

(Vertical Electronic Marketplace) .

(3) (Disruption) 가 .

26).

25) , “B2B e-marketplace ”, 「 」, 575 , LG , p.34.

가
 PC
 가
 가
 PC
 (, ,)
 가
 가
 가
 ‘ ’ 가
 가
 , ,
 (internal negotiation)
 가 가 가
 (auction)
 27).

가
 26) , “ ”, 「 」, 586 , LG
 27) “E-business for shipping”, *Compuship*, June/July 2000, p. 4.

2

1.

가
 . eTForecast 1999
 2 7,600 2000 3 7,500 2005
 8 4 , 2010 18 가 .
 20 가 ,
 , PC가 ,
 , 가 .
 1 1990 0.4 , 1999 46 2000
 61.7 , 2005 129.5 .

Forrester Research <
 2> 2004
 6 8 US 8.6% . 가
 3 2 가 , , .
 2004 2 57 16.4% 가
 .
 ,
 가 , 가 .
 ,
 가 .

< 2>

(B2B+B2C)²⁸⁾

(: US)

	2000	2001	2002	2003	2004	*
	657.0	1,233.6	2,231.2	3,979.7	6,789.8	8.6 %
	509.3	908.6	1,495.2	2,339.0	3,456.4	12.8 %
	488.7	864.1	1,411.3	2,817.2	3,189.0	13.3 %
	17.4	38.0	68.0	109.6	160.3	9.2 %
	3.2	6.6	15.9	42.3	107.0	8.4 %
.	53.7	117.2	286.6	724.2	1,649.8	8.0 %
	31.9	64.4	146.8	363.6	880.3	8.4 %
	5.6	14.0	36.9	96.7	207.6	16.4 %
	5.6	14.1	39.3	100.5	205.7	16.4 %
	4.1	10.7	30.0	80.6	175.8	16.4 %
가	6.5	14.0	60.6	130.5	197.1	2.7 %
	87.4	194.8	422.1	853.3	1,533.2	6.0 %
	20.6	46.4	102.0	200.1	386.5	6.5 %
	17.2	38.5	83.2	165.6	288.8	7.1 %
	9.9	22.1	49.1	104.8	206.4	5.0 %
	7.2	15.6	33.8	71.4	142.4	4.3 %
	6.5	14.4	30.7	59.5	98.3	9.2 %
가	25.9	57.7	123.4	240.8	410.8	6.0 %
	3.6	6.8	13.7	31.8	81.8	2.4 %
	3.2	6.2	13.5	31.5	68.6	2.4 %

: Forrester Research Inc.

: 1) B2B B2C .

2) * 2004 .

2.

(Needs)

가

28) <http://www.forrester.com/ER/Press/ForrFind/0,1768,0,FF.html>

(1) (Shipper)

가
(tracking service) 가
가
가
Intermediaries
(Container Booking) 가
(Freight Auction service) 가
(Freight Bulletin board service)
3

(2) (Shipping Liner)

Intermediaries Intermediaries
ries 가
가 (Container
Booking)
(Fleet)
(Procurement) 가
가

(repositioning) .
 ‘ (Container Management)
 , 가 .
 가
 . 가 Maersk Sealand
 .
 (3) (Shipowner) (Charterer)
 (buyer) 가
 , .
 , ‘
 (Shipbroking) ’가 .
 .
 3
 . 가
 ,
 .
 ‘ , ’ 6가
 , (Maritime Portal), (Procurement),
 (container booking), (Shipbroking), (Online infor
 mation services), Community .

가 , 가

가 ,
가 .

1. (Maritime Portal)

(1)

(Internet Portal Site)

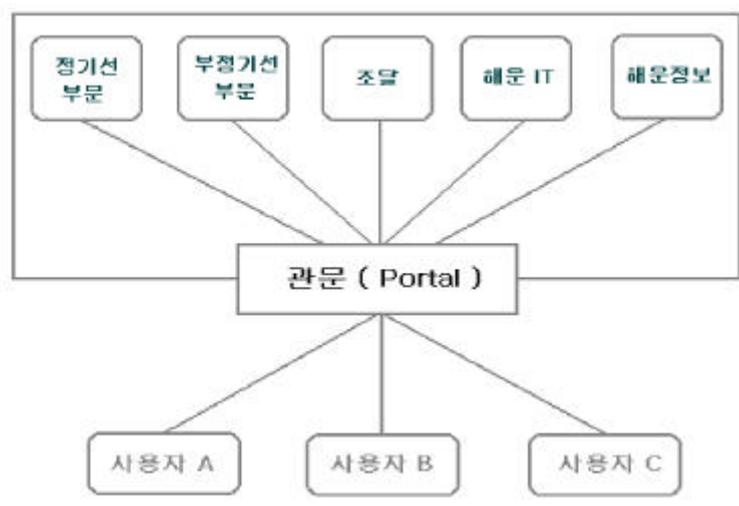
(Portal)

가

가

.29)

< 5 >



29) , 1999 7 5 .

, , , IT . < 5>
가 가 가

‘ (Portal)’

(2)

‘asiaship.com’ . asiaship.com
B2B . < 3> ,
(Ship Support), Freight (Freight Service),
(Port Related service), (Ship Building & Repair),
(Bulk Shipping), (Bunker Supplies) 6가
30)
asiaship.com (community) ,
, , , 가
asiaship.com
가
, Portal site
, e-commerce

30) <http://www.asiaship.com>

< 3> asiaship.com

	<ul style="list-style-type: none"> ■ , , , , ,
Freight Service	<ul style="list-style-type: none"> ■ Freight Booking : FCL, LCL, Air freight ■ Freight enquiries : view schedule & check shipment
	<ul style="list-style-type: none"> ■ ■ EDI
	<ul style="list-style-type: none"> ■ , ■ ■
	<ul style="list-style-type: none"> ■ , , ■ ,
	<ul style="list-style-type: none"> ■ : Shipowners, Charterers, Traders & Agents ■ : Bunker Suppliers, Traders & Brokers

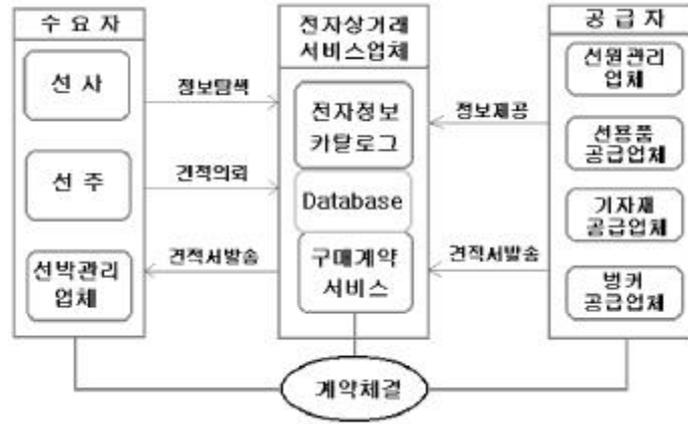
: <http://www.asiaship.com>

2. (Procurement)

(1)

가

< 6 >



< 4 >

< 4 >

31)

가	가
---	---

5 US

32)

31) <http://www.quotegate.com>

32) "Maritime e-procurement", *Compuship*, June/July 2000, p.8.

(2)

BT mE- World(btme.com), Onesea.com, Wallem Shipmanagement and Arena(arena.com), OceanConnect.com, Bunkerworld.com . 가 Arena , 1994 1995 Arena 24 220 . Arena , 33) Wallem 1999 4 Arena 20% 34)

< 5 >

www.btme-world.com	, , ,
www.onesea.com	, , ,
www.oceanconnect.com	, ,
www.maritmeprovider.com	,
www.quotegate.com	,
www.unitor.com	,
www.maritimedirect.com	,
www.bunkerworld.com	
www.ecrewing.com	,

3. (container booking)

(1)

가

33) <http://www.arena.com/about/aboutfr.htm>

34) Lloyd's List, "E-commerce Net link cuts costs for Wallem", 1999. 7. 1.

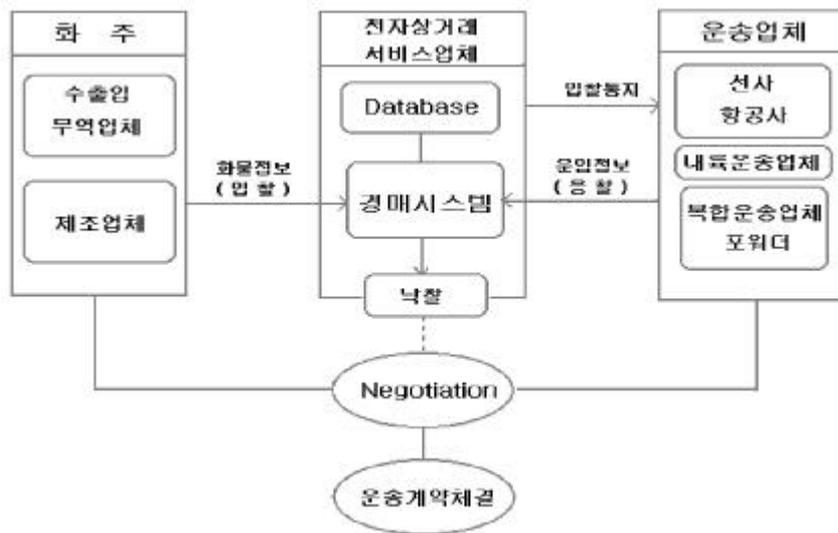
e-commerce

(Freight Auction service) (Freight Bulletin board service)가

(Freight Auction service)

가 ,
가 < 7> , 가
가
,
가 ,
negotiation ,

< 7> (Freight Auction service)



(Freight Bulletin board service)

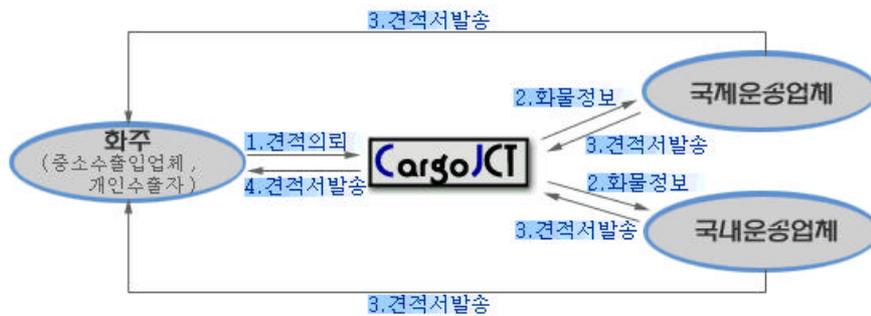
가

(available loads) ,

(desired loads) ,

, (negotiation) .35)

< 8> (Freight Bulletin board service) 36)



(2)

GoCargo, Celarix, E-Transport , e4cargo, ratequery, cargojct .

: GoCargo

gocargo.com 가 가 Freight Auction type 가 .

35) Prince, T. "E-commerce ignore it at your peril", *Containerisation International*, 2000. 1, pp.67-68.

36) <http://www/cargojct.com/intro.htm>

2000 5 , gocargo.com 5,000 ()
) 1,000 (, ,)
 , 1999 11 가 , 가
 .37)

1) e4cargo

e4cargo.com 2000 6 .
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 e4cargo.com ,
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 550 . 2000 9 550
 e4cargo.com 1,200 500
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2) Marine-i

37) "Shipping E-business Supplement", *Comp uship*, 2000. June/July, p.19.

marine-i.com 2000 5

가

marine-i.com

가

marine-i.com

marine-i.com

marine-i.com

가

30%

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marine-com

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marine-i.com

LG

17

17

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500

가

가

40

3) The3rdgate

the3rdgate.com 2000 5

9

가 10

가

가
 . 가
 가
 OOM(Optional Open Market) 가
 , MST (Message Simultaneous Transfer)
 가 가
 가 1
 . 9 the3rdgate.com
 1,500 250 가 가 ,
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 가 가 가 가
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 , , 가 . 4
 10% .

4. (Container Management)

(1)

(Container Management)

가

, , trucking ,

가 가

1

1999

128

가 . 1998

21.5% 420 TEU , 1999 20.5%

가 413 TEU 가 . 2001

19% , 441 TEU

.38)

가

(2)

가 InterBox . interbox.com

IAS(International Asset Systems) 1999 4

가 .

(fleet)

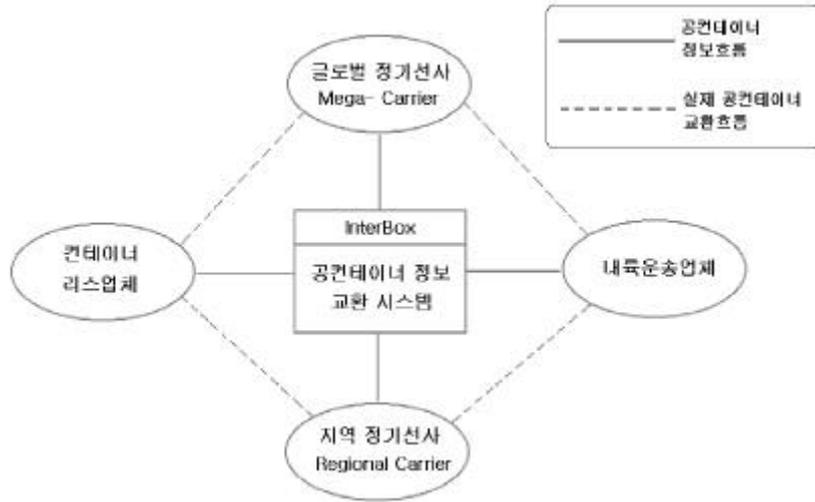
(Neutral

e-trading community) .39)

38) , “ . ”,

39) <http://www.interbox.com/company.html>

< 9 >



IAS 'InterBox' 가 가
 ,
 가 .
 interbox.com egreybox.
 com synchronetmarine.com .

5. (Shipbroking)

(1)

(Shipbroking) , ,
 .
 가

40)

(2)

: Marine-net, LevelSeas

Marine-net

가 , e-mail
 가 ,
 가 Marine-net
 가 0.25%
 가
 BP, Amoco, Cargill, Clarkson & Royal
 Dutch/Shell LevelSeas.com

: Shippingnet.net

shippingnet.net 2000 3

가 . shippingnet.net

40) "Shipping E-business Supplement", *Comp uship*, 2000. June/July, p.14.

shippingnet.net

. 2000 8

1,300

, 9

400-500

150

가

< 6>

< 6>

www.charteringsolutions.com	,
www.gotomar.com	,
www.netshipbrokers.com	
www.shipdesk.com	,
www.i-shipping.com	,
www.shipbuy sell.com	
www.shipbrokering.com	,
www.cargocharters.com	,
www.virtualchartering.com.sg	

6. (Online information services)

(Online information services)

가

1999

shippingkorea.co.kr

. 2000 9

63,000

400

schedulebank.com 1999 4 schedule114.co.kr
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 schedulebank.com
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 shedulebank.com 4,000 , 4000
 . ecplaza.net, e4cargo.com, the3rdgate.com,
 maritimepress.com, cargojournal.co.kr schedulebank.com .

7. Community

community seonet.co.kr, maritime.co.kr, shipp
 ingkorea.co.kr . community가 가
 seonet.co.kr . 1998 3 5,000

4

1

1.

1

가

가

가

(Quantitive)

(Qualitive)

2000 8

846

300

2000 9 1

30

. <

7>

300

52

17.3%

< 7>

300	52	17.3%

2.

MS 'Microsoft Excel 2000'
가

3.

< 8>
11 20 가
30 10% .
67%가

< 8>

			(%)
	30	5	10
	21 30	17	33
	11 20	27	52
	10	13	25
		52	100
	30	4	8
	21 30	14	27
	11 20	21	40
	10	13	25
		52	100
		35	67
		12	23
		3	6
		2	4
		52	100

2

< 9> 가 ,
 61.1% 가 .
 20.4% , .
 8.1% . < 10>
 , 52 38 가(73.1%)
 가 , 14 (26.9%)

< 9> 1.
 ()

		(%)
1		61.1
2		20.4
3		10.5
4		8.1

< 10> 2.

	()	(%)
	38	73.1
	14	26.9
	52	100

2.

< 13>
 . 2000 8 () ‘
 (Cyberconsol)’ 가 ,
 (Less than Container Load)
 . ,
 . 가
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 ,

< 13> 3. ()

		(%)
1	www.cyberconsol.com	27.8
2	www.the3rdgate.com	22.2
3	www.co-load.com	16.7
4	www.e4cargo.com	13.9
5	www.ratequery.com	11.1
6	www.cargonow.com ()	5.6
7	www.quoteship.com ()	2.8

< 14> 4. 3

	(%)
	-
	42.9
	50.0
	7.1
	-

< 15> ,

41)

< 16> 5
 , 25% 가

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(/)	(%)
0 - 5 %	48.2
6 - 10 %	51.8

< 16> 6. 5
 가

가		(%)
0 - 20 % 가	7	50.0
21 - 40 % 가	4	28.6
41 - 60 % 가	3	21.4
61 - 80 % 가	-	-
81 - 100 % 가	-	-
	14	100.0

41) , “ e- ”, 「 」, 2000. 10. p.93.

3

< 18>

, ‘ ’가 65.4% 가

< 19> ‘

가 가’ ,

71.4%가 ‘

가 . 2 , NII(National

Information Infrastructure)가

(Disintermediation)

< 18>

8.

()

		(%)
1	_____	65.4
2		9.8
3		9.4
4		8.0
5		7.3

< 19>

9.

				(%)		
		×			×	
	10	15	25	71.4	39.5	48.1
가	2	12	15	14.3	31.6	28.8
	2	10	12	14.3	26.3	23.1
	14	38	52	100.0	100.0	100.0

: 1)

2) ×

가 48.1% 가
 가 51.9% 가

< 20> 10. 9

			(%)
		7	13.5
		6	11.5
		4	7.7
	가	3	5.8
	가	1	1.9
		12	<u>23.1</u>
		1	1.9
	(가)	12	<u>23.1</u>
		6	11.5
		52	100.0

< 20> 10
 가 가 ‘
 , ‘ (가)
 가) . 2 Sarkar, Butler, and
 Steinfield가 , ,
 (Reintermediation)’

가

< 21> 가 , 가

가 , ‘ 가 25.2%, 22.1%

Sarkar, Butler, and Steinfield가

(Disintermediation)

‘ ’ 20%

가

‘ 가 ’ 16.2%

가 가 가

‘ ’ 15.6%

(vision)

가 가

가

< 21> 11.

		(%)
1		25.2
2		22.1
3		20.0
4	가	16.2
5		15.6
6	(.)	1.0

5

1

NII(National Information Infrastructure)가

가

NII가

가

(Intermediary)

(Disintermediation)

(Electronic market)

(Ocean Freight Forwarder)

Documentation

가

가

가

가

(Electronic market)

가

가

(Disintermediation)

가

Sarkar, Butler,

and Steinfield

가

가

. 1998

(Service Contract)'

trading mechanism

2

1.

가 가

가

가

가 52

가

가 1 .

2.

가 .
가
가 ,
가 ‘ ’ ,
가 .

[]

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<http://www.egreybox.com>
<http://www.interbox.com>
<http://www.synchronetmarine.com>
<http://www.cargonews.com>
<http://www.arena.com/about/aboutfr.htm>
<http://www.cargojct.com/intro.htm>
<http://www.interbox.com/company.html>
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<http://www.shippingnet.net>
<http://www.seanet.net>
<http://www.ratequery.com>
<http://www.cyberconsol.com>
<http://www.shippingclub.com>
<http://www.e4cargo.com>
<http://www.marine-i.com>
<http://www.schedulebank.com>

2- ㉒ 가 ? ()

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3. 가 ?

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4. 가 ? ()

① ② ③ ④ ⑤

5. ? (%)

6. 5 ? ()

① 0-20% 가 ② 20-40% 가 ③ 40-60% 가 ④ 60-80% 가 ⑤ 80-100% 가

7. (, , , , , , ,) ?

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③ (KTnet/ KLnet/) EDI

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10. 9 ?()
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