



Connecting.TW

放大台灣經濟

2017 光洋培訓

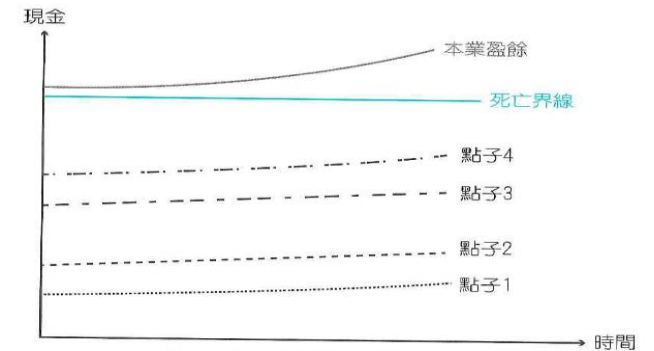
新的思維 + 討論文化



Breaking Hurdles to Innovation

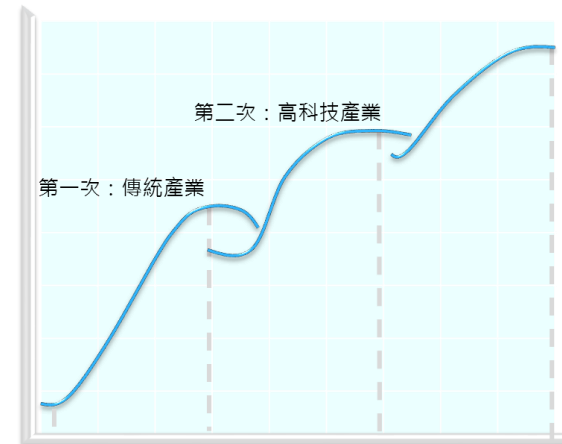
Psychological (fear of few can succeed)

risk management



Inertia (overly dependent on incremental improvement of existing market)

S curve – move out Comfort zone



Structural (company organization is not encouraging for innovation)

Culture & TEAM



團隊策劃 & 執行

???

People

Process

Product



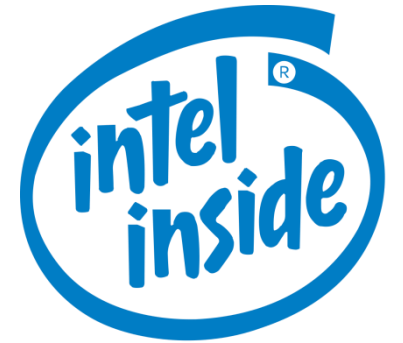
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放大台灣經濟

創新的秘密 2. 核心競爭力

張凱傑

討論-各公司的核心競爭力 (core competency)



SEAGATE

光洋的核心競爭力



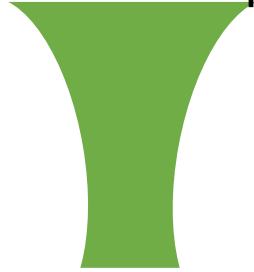
討論-核心競爭力到產品市場的最大化



SEAGATE

Maximize Product Portfolio

Core Comp.



Core Prod.

"V" shape

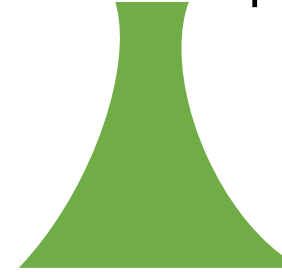
Core Comp.



Core Prod.

"I" 型

Core Comp.



Core Prod.

"^" 型

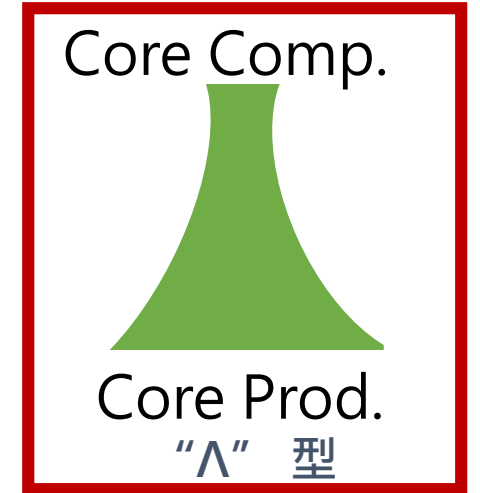
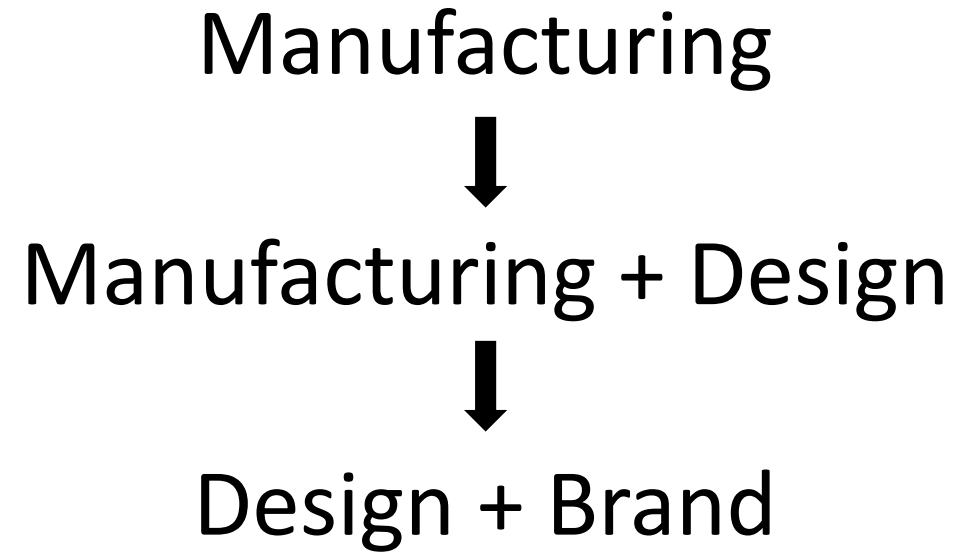
捷安特轉換核心競爭力

- ❑ Founded in 1972
- ❑ 1977 – became a supplier to the US Schwinn Bicycle Company;
- ❑ 1987 – Schwinn switched OEM to a company in China

❑ 2014:
Units produced: 6.6M;
revenue: US\$1.8 billion (2014)
~10% of Global market share in 2017

如何做到?
新核心競爭力是什麼?

Ever changing core competency



ON-ROAD



X-ROAD



OFF-ROAD



E-BIKE



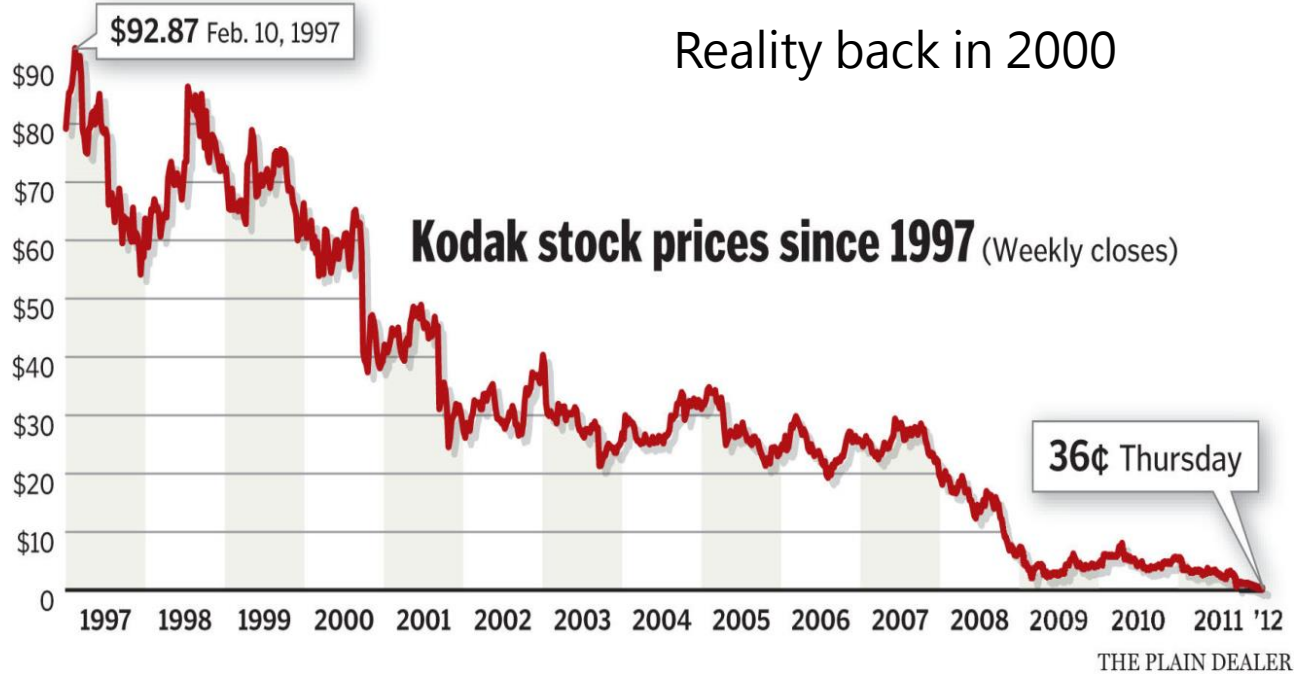
YOUTH

Case study : 柯達的失敗 vs 富士的成功

柯達的失敗



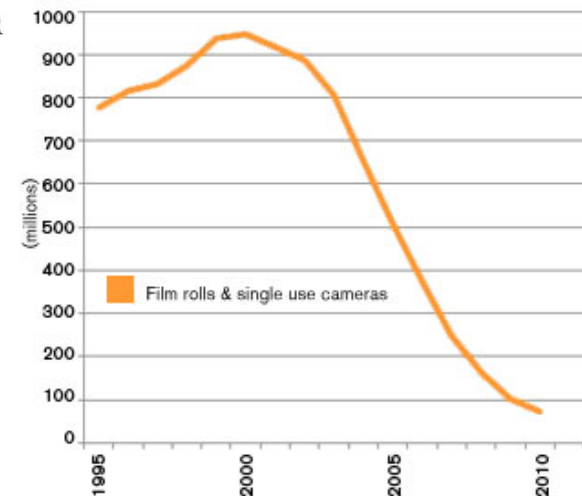
Reality back in 2000



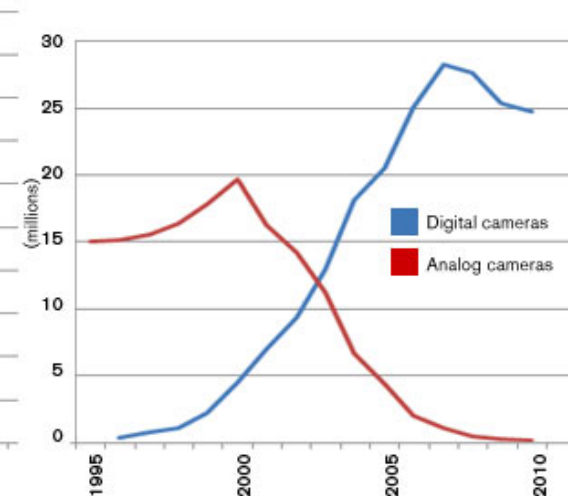
股票價格的衰退是來自於數位相機的普及，侵蝕了傳統軟片公司的市場，進而反應在股價上。

Decline of Film

Film rolls sold



Camera sales



分組討論 background

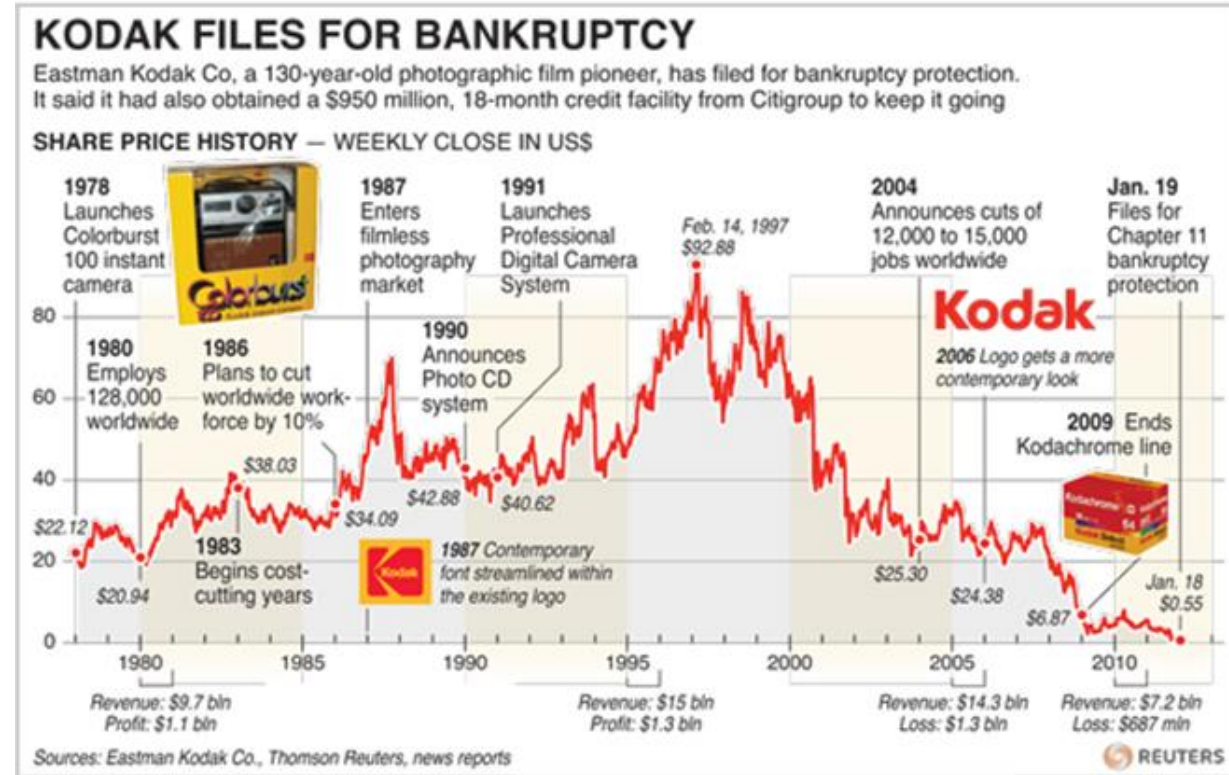
1990 -

I. 核心產品-膠捲攝像: 1. drop-in film cartridge loading, 2. mid-roll change enabling the film to be removed before being completely exposed, 3. new picture formats - Classic, Group, and Panoramic.

II. 公司強項 - 營銷/品牌: campaign to 中國, 蘇俄, 印度, 印尼 "Take Pictures Further"
1996 超過2/3的全球市場占有額, 柯達是世界第五最有價值的品牌

III. 進入 Digital Photography

- 1975 Invented digital camera - 0.01 megapixels
- 1996 Introduced the DC-20 and DC-25 cameras - 0.2 megapixels.
- 2000 Kodak Theater - \$74 million for naming rights to the new Hollywood theater.
- 2001 A&M Ofoto online photography service, later rebranding as Kodak Gallery
- 2002 Launches EASYSHARE System, a line of cameras and docking systems.
- 2005 U.S. camera sales #1 --> 2007 #4 --> 2010 #7 -
- 2012 Chapter 11



你看到柯達失敗的原因？

分組討論 (Breakout Discussion)

今天假設你/妳是公司的CEO 或是董事會的成員之一，要求必需發展新事業及擴大市場，你有以下三個選擇：

1. 增加軟片的市佔率;
2. 進入數位相機的領域 - 這領域有很多公司已有很大的市佔率，並擁有很多的 patents 專利及 know how 技術;
3. 軟片公司有很多化學及表面介面保護的專利技術，可以在化妝保養品上發展，可是公司對於這個市場不熟悉，且這市場規模不大。

你/妳如何決定公司未來的發展方向呢？

分組討論來決定發展方向，理由為何？思考過程為何？ pros and cons ？

- 3 teams
- 20 min discussion
- Report out 5 min each
- Total = 35 min

Eastman Kodak → Digital Photography :

1. 增加軟片的市佔率;
2. 進入數位相機的領域 - 這領域有很多公司已有很大的市佔率，並擁有很多的 patents 專利及know how 技術;

內部問題: 盈利強的膠捲部門，遲不承認膠捲是一個夕陽事業。

策略 :

- (1)繼續從膠捲銷售中獲利
- (2)投資於數位科技

執行側重在 Marketing and Branding: 柯達相信攝影工業的未來是讓更多的人拍照 - 強化品牌優勢，向新興市場家庭做促銷

- (3) 進入 Digital Photography

1975 Invented digital camera - 0.01 megapixels

1996 Introduced the DC-20 and DC-25 cameras - 0.2 megapixels.

2000 Kodak Theater - \$74 million for naming rights to the new Hollywood theater.

2001 A&M Ofoto online photography service, later rebranding as Kodak Gallery - pure branding, 商業模式沒有搭配技術創新來產生競爭優勢

2002 Launches EASYSHARE System, a line of cameras and docking systems. OEM - 沒有軟件和製成上的競爭優勢

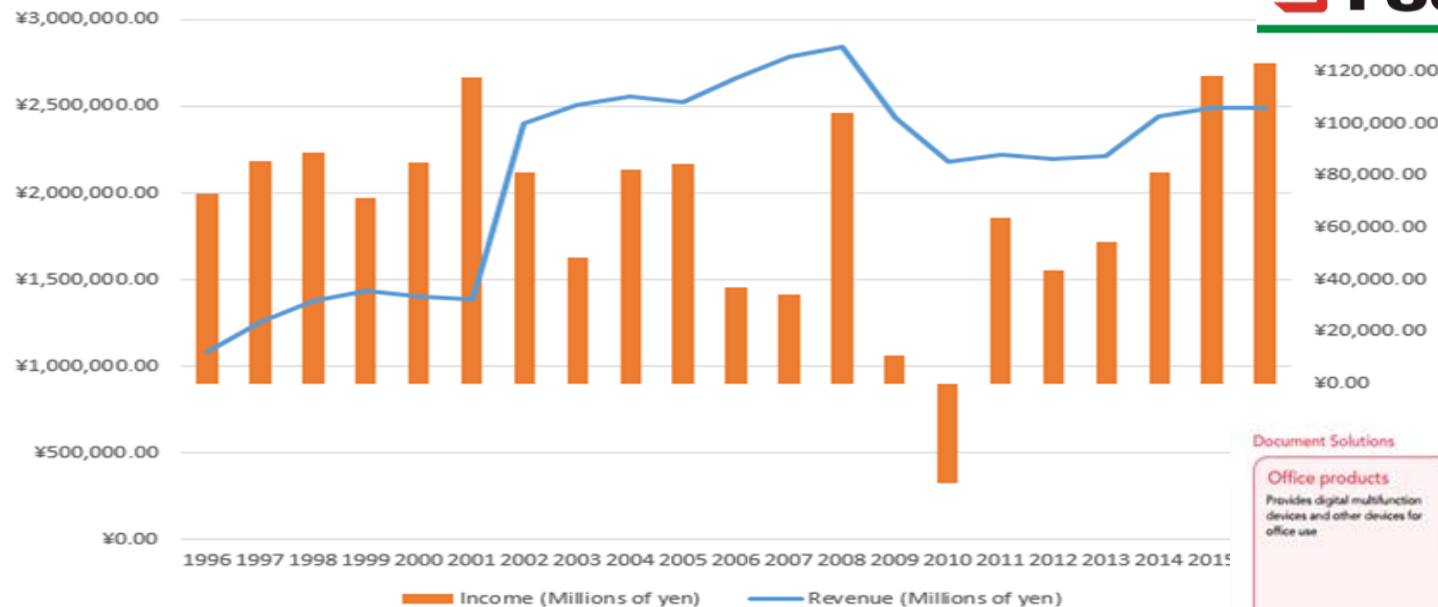
2005 U.S. camera sales #1 ~》 2007 #4 ~》 2010 #7 - 沒有核心競爭優勢，不是數1數2

2012 Chapter 11

Fujifilm Groups Revenue & Net Income, 1996 - 2016



富士軟片



73.6% increase in revenue from 2001 to 2002 came from the consolidation of Fuji Xerox Cor

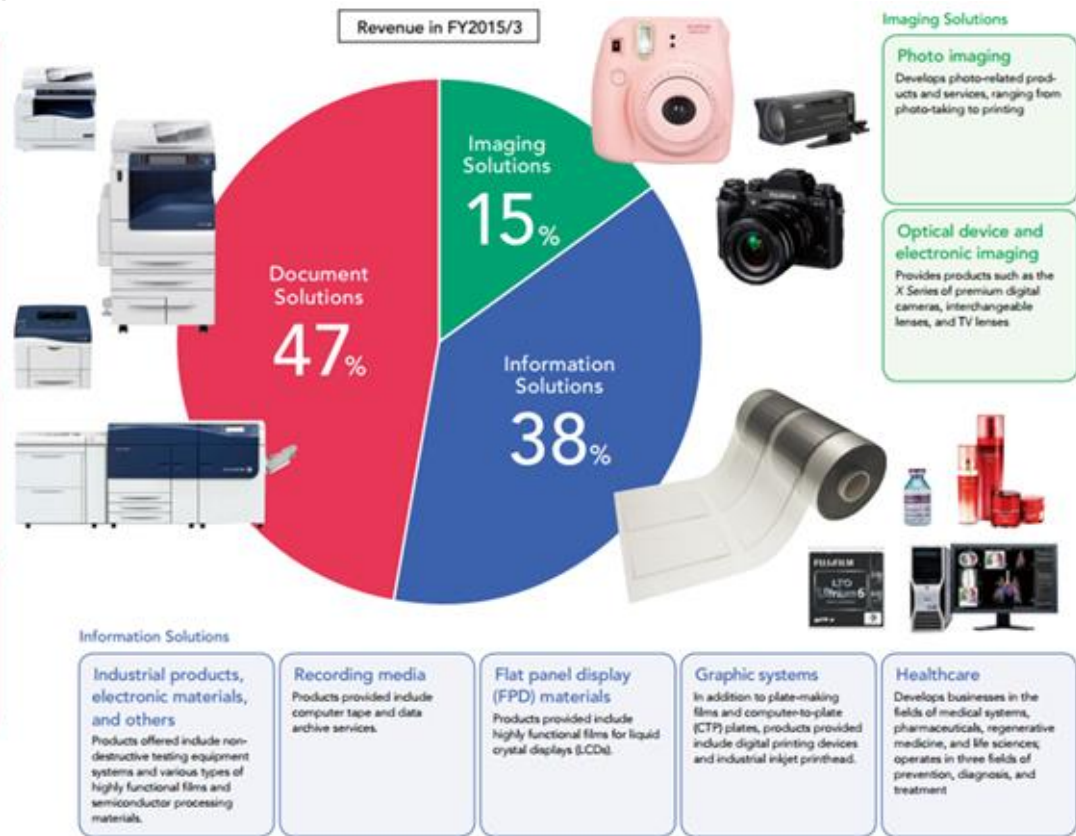
外在市場，公司策略與科達一樣，為什麼不同的結果？

分組討論

你看到富士如何成功？

Document Solutions

- Office products**
Provides digital multifunction devices and other devices for office use
- Office printers**
Provides color and monochrome printers
- Production services**
Provides high-speed, high-quality digital printing systems and associated services
- Global services**
Supports the finding of solutions to customers' document-related issues through improvements to corporate document solutions and operational processes



Imaging Solutions

- Photo imaging**
Develops photo-related products and services, ranging from photo-taking to printing
- Optical device and electronic imaging**
Provides products such as the X Series of premium digital cameras, interchangeable lenses, and TV lenses

Information Solutions

- Industrial products, electronic materials, and others**
Products offered include non-destructive testing equipment systems and various types of highly functional films and semiconductor processing materials.
- Recording media**
Products provided include computer tape and data archive services.
- Flat panel display (FPD) materials**
Products provided include highly functional films for liquid crystal displays (LCDs).
- Graphic systems**
In addition to plate-making films and computer-to-plate (CTP) plates, products provided include digital printing devices and industrial inkjet printhead.
- Healthcare**
Develops businesses in the fields of medical systems, pharmaceuticals, regenerative medicine, and life sciences; operates in three fields of prevention, diagnosis, and treatment

CTW 的 case study example

軟片公司有很多化學及表面介面保護的專利技術，可以在化妝保養品上發展，可是公司對於這個市場不熟悉，且這市場規模不大。

Fuji Film -> 化妝保養品面膜 - 成為化妝品品牌公司

策略：（1）繼續從膠捲銷售中獲利，（2）投資於數位科技，（3）**多元化進入新的領域**

1. 專注于核心技術應用
2. 多元化，顛覆新領域
3. M&A + 深耕技術 (expand核心技術)

2000 - 2010年，膠片從Fuji Film Corporate 利潤的60%到幾乎nothing。

2011 Digital photography is ONLY 1/5th of Fuji Film's revenue (as Kodak tried to monetize its R&D in this one core business)

- （1）富士膠片在將化學品放置在膠片上的納米技術方面的專業知識用於化妝品應用
- （2）使用感光材料幫助精細化學品和工業材料
- （3）富士的醫療成像設備業務迅速增長
- （4）M&A - 策略搭配核心技術新發展



創新市場

