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ENI Company

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EXECUTIVE SUMMARY

ENI Company is an electronic commerce firm in South Korea. ENI Company provides English news items and English lessons to the subscribers through daily e-mail service that includes free English news-related question and answer sessions via e-mail. This case study deals with the struggle of this firm to establish and sustain its business in a less-developed national information infrastructure. Information on national information infrastructure and the Internet in South Korea is provided in order to facilitate understanding of the difficulty that ENI Company faces while conducting e-commerce in South Korea. The chronology of ENI Company evolution is described and the organizational structure of ENI Company is also presented. The marketing of ENI Company's products that is the biggest challenge for the firm is also discussed. This case is a good example of how to conduct an e-commerce in a country where national IT infrastructure is not ready for it.

BACKGROUND

Literature Survey

We can easily suggest that doing an e-commerce business in a developed country should be different from doing it in a less-developed country; here "development" refers mainly to the level of national IT infrastructure development. National IT infrastructure can be defined as the vision of broadband communications that are interoperable as though a single network, easily accessible and widely distributed to all groups within society bringing business, education, and government services directly to households and facilitating peer to peer communication throughout society (Kraemer, et al., 1996). But this idealistic vision is hard to achieve for countries with less economic resources. By conducting a literature survey on e-commerce in developing countries, the following factors in addition to having a well-developed national IT infrastructure, were found to be necessary for a country in order to provide a fertile ground for e-commerce.

1. **Active use of credit cards in the Internet:** countries such as Philippines, India, and China, where credit cards are not widely used, can not find a workable payment method for e-commerce (Asuncion, 1997; Bhatnagar, 1997; Liu, 1997; Rao, 1998). In a way, South Korea is similar to these countries even though credit cards are widely used since many consumers on the Internet are very much reluctant to give out their credit card number. In the cultural point of view, another reason can be the fact that Koreans love to use cash in most business

transactions even for a large sum just like people in Hong Kong (Westland, et al., 1997). As for the payment method in e-commerce in Korea, many companies use money transfer through a bank account, i.e., the buyer sends money to the bank account of the seller and the seller will send the goods to the buyer. This kind of pay-first-get-the goods-later payment method is obviously an obstacle for e-commerce to grow since many consumers feel insecure. Thus it is clear that without the full trust between consumers and e-commerce companies, even a country with widespread credit card use can not facilitate the growth of e-commerce.

2. **Fixed fee option of the unlimited use of local telephone lines:** Unlike the U.S., the South Korean telephone company is a government-owned monopoly. Even though it is trying to upgrade the communication lines with fiber-optic cables, its business policy has not changed, i.e., there is no concept of separate billing for the unlimited local call option. In other words, if a person makes a local call to the Internet Service Provider and surfs the net for a long time, the person will get a very expensive phone bill. With this kind of environment, it is not easy to do e-commerce.

South Korean Internet Statistics

It is estimated that the number of Internet users in Korea is about 350,000 in 1996 as shown in Table 1(NCA, 1997).

Table 1. Number of Internet Users in Korea

	Commercial ISP users	Non-Commercial ISP users
Institution	51,850	69,000
Individual	231,226	221
Total	283,076	69,221

In Figure 1 (NCA, 1997), we can see the rapid growth in the number of users of dedicated lines for their Internet use in Korea. The users are, in general, institutions which then provide Internet access to employees or students in the institution.

In Figure 2 (NCA, 1997), we can also see the rapid growth in the number of owners of PPP/Shell accounts for their Internet use in Korea. The owners are normally individual subscribers of commercial Internet Service Providers.

Using a web-based survey(NCA, 1997), National Computerization Agency(NCA) of Korea was able to collect important statistics on the demographics of the Internet users in Korea. The total number of respondents who visited the survey web site and completed the questionnaire was 1725 and following is the result of the survey.

Figure 1. Number of Dedicated Line Users(Institutions) in Korea

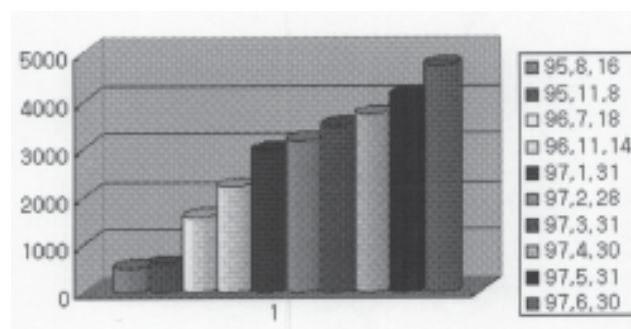
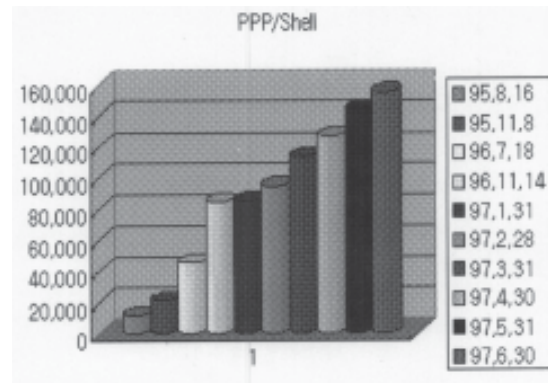


Figure 2. Number of Owners of PPP/Shell Account in Korea



- SEX: male (1463), female (262).
- AGE: under 15 (26), 15-20 (459), 21-25 (453), 26-30 (457), 31-35 (173), 36-40 (75), 41-45 (55), 46-50 (18), over 50 (9).
- OCCUPATION: college student (952), worker-non computer or Internet industry (305), worker-computer industry (125), primary and secondary school student (73), researcher (67), worker-Internet industry (52), teacher and professor (40), government (28), business executive (8), miscellaneous (75).
- EDUCATION: primary school (39), middle school (34), high school (754), 2-year college (261), 4-year college (471), master's (145), doctoral (21).
- PURPOSE OF USING INTERNET: information collection (1301), research (135), entertainment (151), business (82), miscellaneous (56).
- YEARS USING INTERNET: less than 6 months (147), 6 months to one year (854), one-two years (410), two-three years (161), over 3 years (153).

The result shows that the Internet in Korea is a new medium used mainly by young college students and professionals for non-business-related activity; this also means that user population is not very active in utilizing e-commerce as of 1997.

NCA also reports that the total number of e-commerce web sites in Korea is 140 where only 50 have all the mechanisms for automated shopping, i.e., the payment method using credit cards is workable for these sites as of March, 1998 (NCA, 1998). In the same report, NCA estimates the volume of e-commerce in 1998 to be around 9.4 billion won (7 million US dollar). Thus it is clear that e-commerce is in its infancy in Korea.

ENI Company Introduction

ENI Company (pseudonym is being used to protect the anonymity of the firm) is a South Korean firm that specializes delivering overseas news in English and its translation with lessons on English language to the subscribers via e-mail. The primary goal of this business is to educate the public in English reading comprehension as well as inform through up-to-date foreign current affair items. The business was formed in 1997 by a university professor who had extensive knowledge in world affairs. The business charges the subscribers a monthly fixed fee that was approximately US\$10. The English news and its translation with lessons on English expressions are delivered everyday via e-mail to the subscribers. The subscribers can also ask questions regarding the content of the news item and its explanation and the firm answers them as soon as possible.

SETTING THE STAGE

Before we embark on presenting our case, we need to address following issues. Since our subject firm is an e-commerce firm in South Korea, it is bounded by the level of development of South Korean national IT infrastructure. Thus information on South Korean national IT infrastructure is

Table 2: Size of Domestic PC Market

Year	1991	1992	1993	1994
Quantity	614	665	773	1200

*In terms of PC's sold(thousand sets).

Table 3: Telephone Lines per 100 Population (1993)

Korea	US	Japan	Germany	UK	France
38	53	47	46	47	53

Table 4: Subscribers of Mobile Communications

	1993	1994
Mobile Telephones	472	960

*Units: thousand sets.

Table 5: Multimedia Industry (1994)

Type	Sales (Billion Won)
Multimedia PC	94.5
CD-ROM drive	37.5
CD-ROM Title	38.0
Sound card	51.4
Image card	25.0
Tools	5.4
Total	251.8

given. Our subject firm also needs to conduct marketing in cyberspace and in order to facilitate understanding of the concept of cyberspace marketing, we introduce some background theories of cyberspace marketing.

South Korean National IT Infrastructure

South Korea embarked on building its national IT infrastructure in 1994 which was officially called "Korea Information Infrastructure (KII)" project (Jeong and King, 1996). The Korean government committed itself to promoting industries such as computer makers, telecommunication network builders and value-added service providers, multimedia firms, cable TV industries, and Internet-related companies. Major aspects of Korean national IT infrastructure are described in following tables (Jeong and King, 1996).

E-commerce firms in South Korea have to struggle in a national IT infrastructure which is not adequate for effective commercial activity yet. This case shows that despite this kind of hardship, it is possible to create and run an e-commerce firm even though it will be difficult to generate a big financial bonanza.

Cyberspace Marketing

As many firms throughout the world try to conduct business on the Internet, the importance of marketing in the Internet has become an important issue to IS scholars and practitioners alike (Coper, 1998). Some businesses are interested in setting up a WWW site to expand their reach to customers in addition to the physical entity in real world, whereas others try to establish a presence in the Internet without having any physical entity in the real world. In both cases, firms need to conduct marketing in order to solve vexing questions such as who the customers are, how to advertise effectively, etc. (Mosley, 1998).

In this case study we define those consumers who are using the Internet and/or an on-line information provider such as America Online as consumers of cyberspace. Now that cyberspace is born and all these users of cyberspace are reachable by the Internet and they, therefore, have become attractive consumers to the companies that always try to get any individual consumer's attention. For example, a consumer spend their awake time in watching TV or listening to the radio; this is the reason that advertisements exist in those mediums. Thus, similarly, more and more people are spending their time surfing the Internet, which means that companies should advertise in this medium too, since the consumers' precious attention span is being used here just as with TV and radio.

Thus how to advertise effectively in cyberspace has become a very important issue. To advertise effectively, a business should choose the right kind of tool in order to reach enough customers with a reasonable amount of time and money. Many businesses now have web pages which were made for variety of purposes. For example, big corporations created web pages to promote corporate image, thus these web sites are not for trading goods and services. On the other hand, some firms created web sites for the purpose of selling goods and services such as books, computers, flowers, etc.. Among them, some exist only in web sites, i.e., no physical entity exists, while others have physical entities with web sites used for additional business from cyberspace consumers. Except for corporations which created web sites for public relations purposes, all other web sites are engaged in profit-making ventures, which consequently need sophisticated marketing strategies and tools (Hansen, 1998). Thus, Internet marketing can be defined as marketing strategies and tools that are designed to enhance product purchases on the Internet. In other words, Internet marketing is geared toward consumers of cyberspace.

These consumers of cyberspace have some distinctive characteristics compared to real-world consumers. The main differences are as follows. The consumers of cyberspace choose only the web sites which are of interest to them, which means that unlike TV, radio or print advertisement, it is difficult to promote a product to unsuspecting mass customers. In other words, people who are interested in adult-related products will go to those web sites without wandering into some other web sites, such as those selling flowers. Thus, making people aware of the existence of particular web sites even though they are not of interest to the consumer at the moment is not easy. There are some technological breakthroughs such as PUSH technology which does provide web site information to the consumer who seems to have potential interest in the particular area (Burke, 1997).

But even in PUSH technology, one can only push things after the information regarding the customers' behavior is gathered. Thus, with millions newly signing-up to the Internet everyday, the PUSH technology has its limits. Nowadays, Internet advertising is often done in banner ads which take up small space on a web page, are supposedly noticeable and, hopefully, actually being read. But banner ads can appear only in web pages which a particular consumer reads, i.e., if the web site is not visited by consumers, the ad becomes simply obsolete. There has to be a better way to market a product in the Internet in order to reach more people possibly in mass numbers.

Direct e-mail advertisement can be a good answer to solve the above stated problem in Internet marketing. One can not reach mass customers if only banner ads are used. Direct and bulk e-mailing literally means sending bulk or mass number of e-mails directly to unsuspecting users of cyberspace (Gustavson, 1997). The product that is advertised in a direct e-mail advertisement can be anything, which means that unlike PUSH technology which advertises only products considered to be of interest to consumers whose on-line browsing behavior is known, the direct e-mail advertisement can send promotional messages of any product to almost anybody who has an e-mail address. Thus, direct and bulk e-mailing is more or less similar to the direct marketing in real-world shopping. In direct marketing, shoppers are either called or sent a so-called junk-mail by the direct marketer.

Culnan (1993) investigated the consumer attitudes toward direct mail advertisement. In her paper, she claims that strategic uses of information technology based on personal information may raise privacy concerns among consumers if these applications do not reflect a common set of values. Her study addresses what differentiates consumers who object to certain uses of personal information from those who do not object. Data collected by questionnaire from young consumers are used to identify a research approach for investigating attitudes toward the secondary use of personal

information for direct marketing. Secondary information use occurs when personal information collected for one purpose is subsequently used for a different purpose. While secondary information use is both widespread and legal, it may be viewed as an invasion of privacy when it occurs without the knowledge or consent of the consumer.

But in the case of direct e-mail advertisement, there is no prior knowledge or consent of the consumer, therefore there can be serious problems using direct e-mailing as a marketing tool. The setting for her study is the use of point-of-sale data from a supermarket frequent shopper program to generate direct mail solicitations. Control emerges as a clear theme in differentiating individuals with positive overall attitudes toward secondary information use from those with negative attitudes. Study participants with positive attitudes are less concerned about privacy (measured as control over personal information, i.e., some people don't like to try hard to keep every aspect of his/her life under tight control while some people like to be secretive about almost everything; like to be in total control over one's life), perceive shopping by mail as beneficial, and have coping strategies for dealing with unwanted mail.

Notice that this result happens when the use of secondary information was already consented. Thus, in direct e-mailing advertisement, even people who have a tendency to favor less control over his/her life and are more tolerant of junk surface mail, can react negatively to those direct e-mail ads since there was no consent of their address for information use, whatsoever. But people who have tendency to tolerate junk surface mail, might still react positively since those e-mails contain information about products that can be useful or cheaper for the consumer.

Some merits of direct e-mail advertisement are as following.

- a) Unlike direct marketing which can cost heavily, the cost of bulk e-mailing is very low since sending e-mail letters to any number of people in the world does not cost a dime, at least for the use of the communication line, i.e., Internet communication is free. All the firm has to pay is a local phone bill and, if the firm does not own a server, to pay the Internet service provider which does not charge by the number of e-mail letters, but by the time spent on-line (sometimes, just a flat fee per a certain period time, say, a month).
- b) E-mail can cause a very direct response from the consumer since unlike junk letters in real world marketing, people tend to read e-mails even though those are advertisement (Martin, 1998). Junk-mails can be thrown out without even considering what the content could be. But junk or spam e-mails are harder to delete away because people tend to read any e-mail before they delete it. Once they read it, the information which is contained in the ad e-mail can be very effective in terms of getting attention from the customer.

CASE DESCRIPTION

Chronology of ENI Company

1997 January: ENI Company was founded by a marketing professor who spent 10 years studying and working in US and Australia.

1997 February: With 108 subscribers, ENI started to send English news via e-mail.

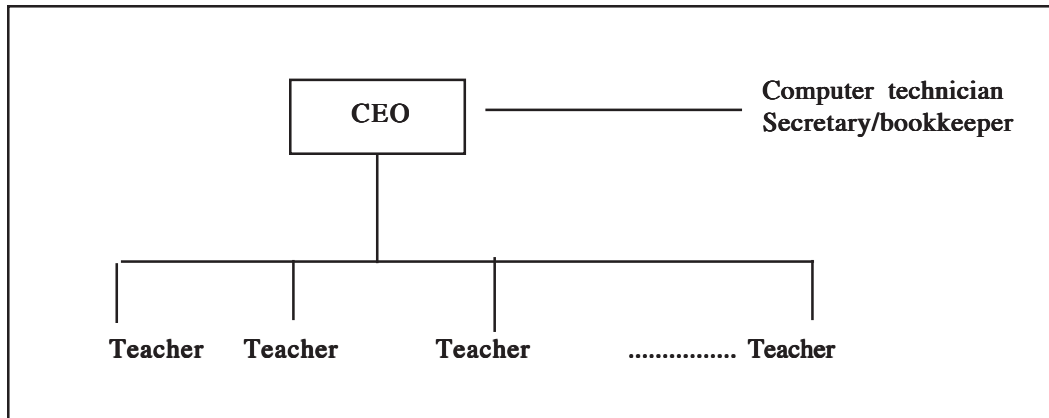
1997 May: The number of subscribers: 220. ENI Company started an advertising campaign in the conventional media as well as cyberspace.

1998 May: The number of subscribers: 1,002. The amount of projected annual sales revenue: 120,000 dollars. The amount of projected annual net profit: 30,000 dollars.

Organization of ENI Company

The founder, who is also the CEO, wanted to minimize bureaucracy which he regarded as a major cost center. Thus the organization of ENI Company is very flat, with primary workers being teachers whose main tasks include translating English news items and answering questions from subscribers. Currently ENI Company has 10 teachers who work in an autonomous environment where each teacher has the authority to work, i.e., teachers have no management interference on how

Figure 3: Organizational Structure of ENI Company



they write English news items and how they answer questions from subscribers. They are given a PC and an e-mail account for their work. Thus translating English news from sources such as AP or Reuters which provide up-to-date news in the Internet, and sending the translated English news plus explanations on English expressions in the news via e-mail, and answering e-mail questions from subscribers, all fall into each teacher's responsibility. With the current 1,000 subscribers, each teacher deals with 100 subscribers personally. Other staff include a computer technician and a secretary who also works as a bookkeeper. Figure 3 shows the organizational structure of ENI Company.

Marketing Strategy of ENI Company

The marketing strategy of ENI Company can be analyzed through marketing mix components as following.

1. **Product:** ENI Company tried to differentiate its products from its competitors by giving a personal touch. In other words, by answering questions from subscribers promptly and paying attention to each subscriber's needs in English learning, ENI Company was successful in attracting loyal followers.
2. **Price:** ENI Company tried to differentiate its price from its competitors by offering a fixed monthly fee regardless of the number of questions answered. Other services charged customers by the length of time they spent on their service, since other services were available on the on-line information providers unlike ENI Company which supplies via e-mail.
3. **Place:** ENI Company did not see a presence in the web as a viable option due to the small number of Internet surfers. Instead, ENI Company noticed that even though there were relatively small number of people surfing the Internet, many more people have e-mail accounts either from commercial Internet Service Providers or from non-commercial Internet Service Providers such as one's own schools and companies. Thus ENI Company decided to exist only in the e-mail form until there will be more web surfers in Korea.
4. **Promotion:** ENI Company tried cyberspace advertising medium such as banner ads which failed due to the small number of web surfers, and bulk e-mailing ads which failed due to the high telephone bill for modem-based mailing and the law against such bulk e-mailing ads for non-modem-based mailings. ENI Company relied more on conventional advertising medium such as magazine and newspaper ads.

Table 6: Marketing Strategy of ENI Company

Product	Personal Touch
Price	Fixed Fee
Place	E-mail Form
Promotion	Conventional Medium

In summary, Table 6 outlines the marketing strategy of ENI Company.

In CEO's Own Words

The CEO of ENI Company provided detailed information on the firm. Following conversations are taken from the interview with the CEO.

Q: When and how was ENI created?

A: "In the beginning of 1997 I created the firm since I thought that I could use my extensive knowledge on world affairs in helping Koreans understand foreign news and at the same time, teach them on English lessons using expressions used in the news items. The Koreans are very interested in improving their English skill, especially young students in high school or college since it is vital to acquire a good English skill in order to get into a good college and to land in a better job. My idea was that if ENI Company could provide attentive answers to questions regarding English promptly, many people would sign on to our service. It turned out to be true. But there was a serious difficulty in getting our company known to the general public."

Q: What are its short and long term objectives?

A: "In short term, our objective is to create a critical mass of loyal subscribers whose size should be at least 1,000 people, which we achieved in a year. In long term, our objective is to move to the web eventually and be able to serve multimedia English news and lessons when the IT infrastructure of Korea improves and the number of Internet users increases significantly."

Q: Who are ENI Company's competitors?

A: "There are several similar services in the on-line information providers such as "Chollian" which is similar to AOL in US. But they don't send out individual e-mails; they put English news and lessons in the directory of on-line information providers. Thus they can not give the personal touch as ENI Company does. ENI Company is the only one that provides daily e-mail English news service to the individual subscribers in Korea."

Q: What were the challenges ahead? And how has ENI addressed the challenges?

A: "The challenge was marketing, especially advertising. In order to get more subscribers, it was critical to do effective advertising campaign. We tried conventional advertising medium such as magazines, radio, and newspapers as well as cyberspace advertising medium such as banner ads in the web page and direct e-mail ads. Besides conventional advertising medium whose effect was obvious, we thought that cyberspace ads could be effective too. At first, the banner ad in the web page looked attractive but soon we realized that the number of people who browsed the web pages in South Korea was still not big enough due to the low development of national IT infrastructure. We finally looked at mass mailing technique and it looked workable. We sent out direct e-mail ads and found out that modem-based bulk mailing used up so much telephone time that it was not financially feasible since there was no fixed fee option for local phone call in Korea. Non-modem-based bulk mailing through the Internet could not be used either since the Internet bulk mailing was already against the law in Korea. Thus we relied more on conventional medium such as magazine and newspaper ads."

Q: What were the critical events and outcomes in the evolution of ENI Company?

A: "The critical event happened after we installed the mass mailer and used it for sending advertisement mails for ENI Company. We didn't realize how big the telephone bill could be when the dial-up connection was used for a long time. In other words, during the peak hours the performance of the mass mailer got downgraded, which resulted in taking much longer time to finish sending out all mails. This meant a disaster for ENI Company since the increased revenue from the bigger number of subscribers thanks to the mass mail advertisement was wiped out because of astronomical amount of the local phone bill. This event forced us to give up advertising through the mass mailer."

CURRENT CHALLENGES/PROBLEMS FACING THE ORGANIZATION

Following matters can be considered to be current challenges/problems for ENI Company.

First, how to sustain an e-commerce venture in a less-developed national IT infrastructure is a big concern for ENI Company. Effective e-commerce activity requires well-developed national information technology infrastructure such as well-connected fiber optic computer networks that cover the entire country, and easy availability of computers and affordable cost of network use among ordinary citizens of the country.

Second, how to conduct marketing for the venture is another big concern for ENI Company. Not only is it very difficult to establish a functioning e-commerce firm but it is even more difficult to do marketing on the Internet. The product of an e-commerce firm is usually advertised in banner-style ads in the web page, which is a common practice and is considered to be a working solution in developed countries. However, in countries such as South Korea, not many people are surfing the Internet, i.e., the number of people who can afford to surf the Internet for quite a long time are very limited due to the outdated billing practice of the government-owned monopolistic phone company. Thus, in this environment an e-commerce company which wants to sell a tangible product such as computer hardware components or software items has no choice but to create a web page that sells those products and faces the problem of how to make its web page noticeable to the small-number of Web surfers in Korea. Furthermore, those e-commerce companies who sell intangible goods face even more difficult challenge in advertising their products. The company which is the subject of this case sells English news and English lessons as products; they deliver these products to the individual's e-mail account. In short, any e-commerce company in Korea faces the same problem in marketing, which is how to advertise effectively in an environment where there are only small number of people who are surfing World Wide Web pages.

Third, how to establish a workable payment method is the biggest concern for ENI Company. This matter is a serious obstacle in the development of e-commerce even in developed countries such as the U.S. since consumers are worried that their credit card numbers might be stolen and might not get the ordered goods after paying with credit cards. In less developed countries such as South Korea, the consumers are, of course, very much worried when they order a product on-line or through the Internet, not because of the possibility that their credit card numbers might be stolen, but mostly because of the fact that the cash they have already paid might be robbed, i.e., the goods never arrive. The reason is rather simple. In a less-developed country like South Korea, not many people have credit cards and even for those with credit cards, tend to prefer cash when the price of the good is not very high. For this reason, most on-line payment is made as follows: First, the customer goes to the bank and does a wire-transfer of cash to the designated bank account of the seller which is an e-commerce firm. Second, the e-commerce firm's employee goes to the bank and checks if a certain customer's cash was transferred. Last, if the money-transfer is confirmed then the firm sends out the good that was ordered by the customer. With this kind of payment method, the consumers are naturally worried, since in actual incidents some firms took the money and ran away, i.e., no goods arrived.

Last, how to handle customer relations is also a concern for ENI Company. The subject of our case is a firm that claims to be attentive to the needs of the customers, i.e., it promises to answer all questions regarding English news items and lessons using those news items that are delivered to the subscribers. But in reality, it is very difficult to give satisfying answers to every question from the customer. Thus, quality control of customer service is a challenging puzzle to solve.

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