

یادداشت‌ها

کسب و کار پلتفرم‌ها



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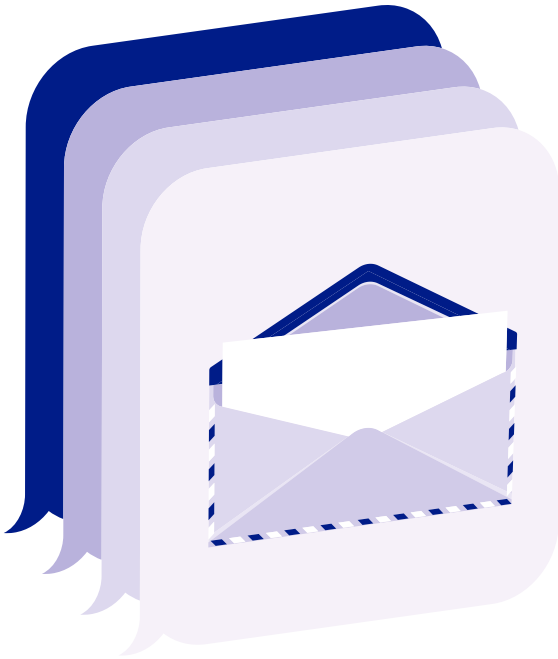
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• پیشگفتار و سیاست‌گذاری •

1. Annabelle Gawer and Michael A. Cusumano, *Platform Leadership: How Intel, Microsoft, and Cisco Drive Industry Innovation* (Boston: Harvard Business School Press, 2002).
2. Annabelle Gawer and Michael A. Cusumano, "How Companies Become Platform Leaders," MIT Sloan Management Review 49, no. 2 (Winter 2008): 28–35.
۳. برای بحث در مورد پوشش پلتفرمی مراجعه کنید به: Thomas Eisenmann, Geoffrey Parker, and Marshall Van Alstyne, "Strategies for Two-Sided Markets," *Harvard Business Review*, October 2006, 92–101.
4. David B. Yoffie and Michael A. Cusumano, *Strategy Rules: Five Timeless Lessons from Bill Gates, Andy Grove, and Steve Jobs* (New York: HarperBusiness, 2015).

• فصل ۱. تفکر پلتفرمی •

1. Michael W. Miller, "High-Tech Saga: How Two Computer Nuts Transformed Industry Before Messy Breakup," *Wall Street Journal*, August 27, 1986.
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۳. این اطلاعات از مصاحبه‌ی مجله‌ای در سال ۱۹۹۴ با بیل گیتس به دست آمده است که در منبع زیر نقل شده است:
Cusumano and Selby, *Microsoft Secrets*, 159.
4. David B. Yoffie and Michael A. Cusumano, *Strategy Rules: Five Timeless Lessons from Bill Gates, Andy Grove, and Steve Jobs* (New York: HarperBusiness, 2015), 98–100.
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۶. برای جزئیات بیشتر مراجعه کنید به: "Did Apple not originally allow anyone to develop software for the Macintosh?" Stack Exchange Retrocomputing, <https://retrocomputing.stackexchange.com/questions/2513/did-apple-not-originally-allow-anyone->

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"List of Unicorn Start-Up Companies," *Wikipedia*, https://en.wikipedia.org/wiki/List_of_unicorn_start-up_companies (accessed May 21, 2018).

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۱۲. مراجعه کنید به:

Lina Khan, "Amazon's Antitrust Paradox," *Yale Law Journal* 126, no. 3 (January 2017): 710–805; and "How Many Products Does Amazon Sell?—January 2018," ScrapeHero, <https://www.scrapehero.com/many-products-amazon-sell-january-2018/> (accessed May 17, 2018).

۱۳. به عنوان مثال، مراجعه کنید به:

David B. Yoffie and Eric Baldwin, "Apple, Inc. in 2015" (Boston: Harvard Business School Publishing, Case #9-715-456).

۱۴. تعریف ما از اصطلاح «پلتفرم» نسبت به تعریف ابتدایی که امروزه ما آن را پلتفرم‌های نوآوری صنعتی می‌نامیم، در طول سال‌ها تکامل یافته که در منبع زیر به آن اشاره شده است: Annabelle Gawer and Michael A. Cusumano, *Platform Leadership: How Intel, Microsoft, and Cisco Drive Industry Innovation* (Boston: Harvard Business School Press, 2002).

این کتاب از تعریف جامع‌تری که در منبع زیر آمده است، استفاده می‌کند: Annabelle Gawer, ed., *Platforms, Markets, and Innovation* (Cheltenham: Edward Elgar, 2009); and Michael A. Cusumano, *Staying Power: Six Enduring Principles for Management Strategy and Innovation in an Uncertain World* (Oxford: Oxford University Press, 2010).

همچنین مراجعه کنید به:

Michael A. Cusumano, "The Evolution of Platform Thinking," *Communications of the ACM* 53, no. 1 (January 2010): 32–34.

15. Geoffrey Parker, Marshall Van Alstyne, and Sangeet Paul Choudary, *Platform Revolution: How Platform Markets Are Transforming the Economy and How to Make Them Work for You* (New York: W. W. Norton, 2016).
16. David S. Evans and Richard Schmalensee, *Matchmakers: The New Economics of Multisided Platforms* (Boston: Harvard Business Review Press, 2016).
17. Annabelle Gawer and Michael A. Cusumano, "How Companies Become Platform Leaders," MIT Sloan Management Review 49, no. 2 (Winter 2008): 28–35; and Cusumano, *Staying Power*, 64.
۱۸. گاهی اوقات به اثر شبکه‌ای «اثر جانبی شبکه‌ای» (درحقیقت، این دو کمی متفاوت هستند) یا «صرفه مقیاس طرف تقاضا» گفته می‌شود، اگرچه تعیین طرف تقاضا دشوار است. برای کسب اطلاعات بیشتر، مراجعه کنید به:
- S..J. Liebowitz and Stephen E. Margolis, "Network Externality: An Uncommon Tragedy," *Journal of Economic Perspectives* 8, no. 2 (Spring 1994): 133–50.
۱۹. همان‌طور که در منبع زیر توضیح داده شده است، تأثیرات متعددی بر رویکرد ابتدایی ما در مورد اثر شبکه‌ای یا «پویایی اثر واگنی» وجود داشت
- Michael A. Cusumano, Richard S. Rosenbloom, and Yiorgos Mylonadis, "Strategic Maneuvering and Mass Market Dynamics: The Triumph of VHS Over Beta," *Business History Review* 66, no. 1 (Spring 1992): 51–94.
- مهم‌ترین تأثیرات در ادبیات علوم اقتصادی موارد زیر بود:
- Michael Katz and Carl Shapiro, "Network Externalities, Competition, and Compatibility," *American Economic Review* 75, no. 3 (June 1985): 424–40; "Technology Adoption in the Presence of Network Externalities," *Journal of Political Economy* 94, no. 4 (August 1986): 822–41; and Paul David, "CLIO and the Economics of QWERTY," *American Economic Review* 75, no. 2 (May 1985): 332–37.
- همچنین مراجعه کنید به:
- Joseph Farrell and Garth Saloner, "Standardization, Compatibility, and Innovation," *Rand Journal of Economics* 16, no. 1 (Spring 1985): 70–83; and "Installed Base and Compatibility: Innovation, Product Preannouncements, and Predation," *American Economic Review* 76, no. 5 (December 1986): 940–55.
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۲۱. همان‌طور که پیش‌تر ذکر شد، پلتفرم‌های نوآوری همان چیزی است که پیش‌ازاین در Gawer and Cusumano, *Platform Leadership*;

و سایر مقالات و کتاب‌ها به‌عنوان «پلتفرم‌های صنعتی» از آنها یاد می‌کردیم. آنها مشابه همان چیزی هستند که ایوانز، هاجیو و اشمالنسی در نوشته‌های مختلف آن را «پلتفرم‌های نرم‌افزاری» نامیده‌اند. مراجعه کنید به:

David S. Evans, Andrei Hagiu, and Richard Schmalensee, *Invisible Engines: How Software Platforms Drive Innovation and Transform Industries* (Cambridge, MA: MIT Press, 2006); and Evans and Schmalensee, *Matchmakers*.

۲۲. ایوانز و اشمالنسی پیش‌تر به آنچه ما پلتفرم‌های مبادلاتی می‌نامیم «واسطه‌گران» و همچنین «سیستم‌های مبادلاتی» اطلاق کرده‌اند. برای استفاده به‌ویژه از اصطلاح دوم، مراجعه کنید به: David S. Evans and Michael Noel, “Defining Antitrust Markets When Firms Operate Two-Sided Platforms,” *Columbia Business Law Review* 2005, no. 3 (January 2005): 667–702.

در رأی یکی از دادگاه‌های عالی ایالات متحده در مورد امریکن اکسپرس، از اصطلاح «پلتفرم مبادلاتی» استفاده شده است که بر قانونی بودن تلاش‌ها برای منصرف کردن پذیرندگان از سوق دادن مشتریان به سوی سایر کارت‌های اعتباری با هزینه کمتر، متمرکز بود. چندین پرونده دادگاه بدوی به این موضوع رسیدگی کردند. مراجعه کنید به: Supreme Court of the United States, *Ohio et al. v. American Express Co. et al.* (2018).

با سپاس از ریچارد اشمالنسی برای این منبع.

۲۳. برای انجام برخی تحلیل‌های آماری و کنترل کردن تفاوت‌های صنایع، ما همه شرکت‌های فوربز گلوبال ۲۰۰۰ و شرکت‌های پلتفرمی را نیز از صنایع مشابه انتخاب کردیم و سپس این گروه نمونه با کنترل صنعت را که شامل ۱۰۰ شرکت (۱۰۱۸ مشاهده سالیانه) بود، با ۴۳ پلتفرم (۳۷۴ مشاهده سالیانه) مقایسه کردیم. چندین مقایسه دیگر بسیار معنادار بودند (در سطح اطمینان آماری ۹۹ درصد).

۲۴. برای دسترسی به اولین مقاله ما در مورد تحلیل داده رجوع کنید به:

Michael A. Cusumano, Annabelle Gawer, and David B. Yoffie, “Platform vs. Non-Platform Company Performance: Some Exploratory Data Analysis,” Platform Research Symposium, Boston University, July 2018.

تحلیل نهایی موجود در این کتاب توسط آنکور چاودا انجام گرفت که در آن زمان دانشجوی دکتری دانشگاه ام‌آی‌تی بود. پایگاه داده ابتدایی توسط پژوهش‌یارهای دیگر در دانشگاه هاروارد (دانیل نایتینگل و دامیان کوراک) و دانشگاه سوری (جرج زایدپولوس) ساخته، پاک‌سازی و تحلیل شد.

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۲۶. برای این محرک‌های بازار پلتفرمی رجوع کنید به:

Thomas Eisenmann, Geoffrey Parker, and Marshall Van Alstyne, “Strategies for Two-Sided Markets,” *Harvard Business Review*, October 2006, 92–101; and Parker, Van Alstyne, and Choudary, *Platform Revolution*.

• فصل ۲. همه یا بیشترین از آن برنده •

۱. آندری هاجیو و سیمون راتمن به محدودیت‌های اثر شبکه‌ای نیز اشاره کردند. آنها به شرکت‌های پلتفرمی هشدار دادند که روی رشد سریع تمرکز نکنند و به جای آن، پایه‌ای محکم از اعتماد برای مصرف‌کنندگان و نهادهای نظارتی ایجاد کنند. مراجعه کنید به: Andrei Hagiu and Simon Rothman, "Network Effects Aren't Enough," Harvard Business Review, April 2016.

۲. ما برای مفهوم‌پردازی چهار عامل محرک بازار مدیون هستیم به: Thomas Eisenmann, Geoffrey Parker, and Marshall Van Alstyne, "Strategies for Two-Sided Markets," Harvard Business Review, October 2006, 92–101.

همچنین مراجعه کنید به:

Geoffrey Parker, Marshall Van Alstyne, and Sangeet Paul Choudary, Platform Revolution: How Platform Markets Are Transforming the Economy and How to Make Them Work for You (New York: W. W. Norton, 2016).

3. "Track Gauge in the United States," Wikipedia, https://en.wikipedia.org/wiki/Track_gauge_in_the_United_States (accessed April 26, 2018).

۴. برای بررسی یک منبع در این مورد در طول تاریخ مراجعه کنید به: AT&T, "Evolution of the SBC and AT&T Brands: A Pictorial Timeline," http://www.att.com/Common/files/pdf/logo_evolution_factsheet.pdf (accessed April 26, 2018).

۵. مفهوم اثر جانبی شبکه‌ای ظاهراً برای اولین بار در گزارش سالانه بل تلفن در سال ۱۹۰۸ توسط مدیرعامل شرکت، تئودور ویل، با توجه به «اثر شبکه‌ای» معرفی شد: Wikipedia, https://en.wikipedia.org/wiki/Network_effect (accessed April 26, 2018)

اولین مقاله تأثیرگذار فنی در حوزه اقتصاد شبکه‌ای در صنعت ارتباطات، مقاله زیر است: Jeffrey Rohlfs, "A Theory of Interdependent Demand for a Communications Service," *Bell Journal of Economics and Management Science* 5, no. 1 (Spring 1974): 16–37.

در این مقاله و مقالات دیگر، مفهوم اثر جانبی شبکه‌ای برای توجیه قیمت‌گذاری نسبتاً کم (به‌عنوان مثال، کمتر از هزینه) برای خدمات معرفی شد. این موضوع به‌ویژه برای کاربران جدید در راستای دستیابی به پوشش همگانی در نظر گرفته می‌شود؛ یعنی با پرداخت یارانه توسط کاربران قدیمی (به‌ویژه در شهرها) به کاربران جدید (به‌ویژه در مناطق روستایی)، با این فرض که همه افراد شبکه به‌طور بالقوه از اضافه شدن هر کاربر جدید سود می‌برند.

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۷. مراجعه کنید به:
 “Telephone Directory,” *Wikipedia*, https://en.wikipedia.org/wiki/Telephone_directory (accessed April 26, 2018).
۸. ما مفهوم «رایگان، اما نه رایگان» را در منبع زیر تشریح کرده‌ایم:
 Michael A. Cusumano and David B. Yoffie, *Competing on Internet Time: Lessons from Netscape and Its Battle with Microsoft* (New York: Free Press/Simon & Schuster, 1998), 100.
۹. برای تاریخچه کتاب‌های اطلاعات تماس مراجعه کنید به:
https://en.wikipedia.org/wiki/Yellow_pages (accessed April 26, 2018).
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11. Michael J. de la Merced, “AT&T Sells Majority Stake in Yellow Pages to Cerberus,” *New York Times*, April 9, 2012.
۱۲. ارائه محصول یا خدمات به‌عنوان «هسته» یا عنصری اساسی از راه‌حل مشکلی در سطح صنعت، یک استراتژی است که ما در نوشته‌های قبلی آن را «هسته‌سازی» نامیده‌ایم. کاربرد این موضوع در بازارهایی است که هنوز پلتفرمی در آنها وجود ندارد. مراجعه کنید به:
 Annabelle Gawer and Michael A. Cusumano, “How Companies Become Platform Leaders,” *MIT Sloan Management Review* 49, no. 2 (Winter 2008): 28–35.
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 Timothy Bresnahan, Joe Orsini, and Pai-Ling Yin, “Demand Heterogeneity, Inframarginal Multihoming, and Platform Market Stability: Mobile Apps,” Stanford University Working Paper, September 15, 2015.
۱۸. مراجعه کنید به:
 Eisenmann, Parker, and Van Alstyne, “Strategies for Two-Sided Markets”; and Michael A. Cusumano, *Staying Power: Six Enduring Principles for Management Strategy and Innovation in an Uncertain World* (Oxford: Oxford University Press, 2010), 61–62.
۱۹. مراجعه کنید به:

“Open Handset Alliance,” *Wikipedia*, https://en.wikipedia.org/wiki/Open_Handset_Alliance (accessed October 19, 2018).

برای مباحث بیشتر در مورد این مثال و موضوع «یکه‌تازی» مراجعه کنید به:

Gawer and Cusumano, “How Companies Become Platform Leaders.”

20. Shira Ovide and Daisuke Wakabayashi, “Apple’s Share of Smartphone Industry Profits Soars to 92%,” *Wall Street Journal*, July 12, 2015; and Patrick Seitz, “Apple Took 92% of Smartphone Profits in Q4,” *Investors Business Daily*, February 7, 2017, <http://www.investors.com/news/technology/click/apple-took-92-of-smartphone-industry-profits-in-q4/>.
21. Upwork, “Fortune 500 Enterprises Shift Their Contingent Workforce to Upwork Platform Saving Both Time and Money,” press release, February 6, 2018, <https://www.upwork.com/press/2018/02/06/fortune-500-enterprises/>.
22. Dylan Minor and David B. Yoffie, “Upwork: Creating the Human Cloud” (Boston: Harvard Business School Publishing, HBS Case #9-718-402, July 6, 2018), 1.
23. Form S-1, UPWORK INC., <https://www.sec.gov/Archives/edgar/data/1627475/000119312518267594/d575528ds1.htm> (accessed September 11, 2018).

۲۴. مراجعه کنید به:

David B. Yoffie, ed., *Competing in the Age of Digital Convergence* (Boston: Harvard Business School Press, 1997).

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David Gelles, “Facebook’s Grand Plan for the Future,” *Financial Times*, December 3, 2010; and Annabelle Gawer, “What Managers Need to Know About Platforms,” *European Business Review*, July 20, 2011.

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۳۰. به‌عنوان مثال به شهادت اریک اشمیت مدیرعامل گوگل در مقابل کنگره ایالات متحده آمریکا در سپتامبر ۲۰۱۱ در لینک زیر مراجعه کنید:

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32. Henry Blodgett, "Everyone Who Thinks Facebook Is Stupid for Buying WhatsApp for \$19 Billion Should Think Again . . ." *Business Insider*, February 20, 2014.
33. Evan Spiegel, "Let's Chat," Snap Inc., May 9, 2012, <https://www.snap.com/en-US/news/post/lets-chat/> (accessed October 30, 2018).

۳۴. مراجعه کنید به:

Adi Suja, "Top 15 Niche Online Businesses for Inspiration," *ecommerce platforms*, June 28, 2018, <https://ecommerce-platforms.com/articles/top-niche-ecommerce-stores> (accessed August 11, 2018).

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39. Venkat Venkatraman, *The Digital Matrix: New Rules for Business Transformation through Technology* (Canada: Lifetree Media, 2017).
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• فصل ۳. استراتژی و مدل‌های کسب و کار •

۱. مراجعه کنید به:

Jonathan Wareham, Paul Fox, and Josep Lluís Cano Giner, "Technology Ecosystem Governance," *Organization Science* 25, no. 4 (July–August 2014); and Geoffrey Parker, Marshall Van Alstyne, and Sangeet Paul Choudary, *Platform Revolution: How Platform Markets Are Transforming the Economy and How to Make Them Work for You* (New York: W. W. Norton, 2016).

2. David B. Yoffie, Liz Kind, and David Ben Shimol, "Numenta: Inventing

and (or) Commercializing AI” (Boston: Harvard Business School Publishing, Case #9-716-469, July 2018).

۳. همچنین مراجعه کنید به:

Cade Metz, “Jeff Hawkins Is Finally Ready to Explain His Brain Research,” *New York Times*, October 14, 2018.

4. David S. Evans and Richard Schmalensee, *Matchmakers: The New Economics of Multisided Platforms* (Boston: Harvard Business Review Press, 2016).

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