

COMPETITIVE ADVANTAGE & CORE COMPETENCE: HOW JERONIMO MARTINS WON THE POLISH RETAIL MARKET

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Introduction

The more high-profile the business, the more exceptional are its changes. These changes are demolishing traditional ways of thinking; however, typical and routine reactions to stimuli are still being seen, which, combined with a lack of ontologically clarified perspectives, may confine us to an ability to solve only current problems despite the need to make deep and innovative changes to properly defined core competences and return to the roots of business. Shallow and/or superficial changes are no longer enough. They serve only to conserve the existing rivalry system that revolves around one or two features, mainly historically selected and embedded in managers' consciousness (e.g., prices). Boards of managers tend to react to ongoing market changes and competitors' movements in the quickest and easiest way, avoiding fundamental changes and challenges. Explaining this behavior is not the purpose of this paper, however, which, rather, argues for the discovery of forgotten or unseen spaces for improving the ability to cope with market challenges. This process has been called „innovation” although the term covers a much broader terminological area. It is thus appropriate to describe this paper's case study and definition of „core competences” as being relevant to innovation. This study argues that a return to the fundamentals of the retail industry would be a breakthrough in building competitive advantages. This paper defines „retail” as the logistics linking producers and customers, which appears obvious in retrospect: how else could contemporary large-format retail be defined? It is more than a shop that offers products to customers, but this was not obvious before Jeronimo Martins staged its revolution.

The main goal of the paper is showing the need for a deep and not superficial changes in approaches to building competitive advantages, particularly for mature businesses and well-understood consumers.

The secondary goal of the paper is demonstrating that some core competences are hidden and not obvious thus require deeper understanding of the growth drivers of the company.

The first part of this paper discusses the essence and significance of innovativeness within key competences designed to create value for clients and organizations. The analysis identifies the success factors in strategies for ap-

plying innovative solutions to key competences and the driving stimuli of these strategies in areas of particular importance for the market.

The second part is a case study on Jeronimo Martins Polska S.A., one of the key players in the Polish retail market. The company is perceived in Poland as a pioneer in distribution innovation, a key component of its business activity. The solutions applied by this Portuguese group, particularly the creation of a logistics network based on efficient distribution center activities throughout Poland, contributed to the establishment and enhancement of an indisputably recognizable brand based on innovativeness through the sustained optimization of buying, supplying, and distribution. Though the term „logistics” is used frequently in the study it is used here more to highlight the need for „out of box” defining core competences and deep and fundamental changes in the business as a way for competitive advantages development. The concern is not logistics itself.

Innovativeness in the context of key competences

The development of competence is the result of the proper integration and coordination of processes in the value creation chain, both in the traditional approach [Porter, 1985; Kotler, 2012] and the extended one [Normann, Ramirez, 1993]. Competence development forms the foundation for building future competitive advantages [Hamel, Prahalad, 1994] and represents innovative combinations of knowledge, skills, technology, information, and unique operational methods [Bratnicki, 2000, p. 16; Pindelski, Obloj, 2006]. The coordination and integration of such competences have become the key elements in the transformation of organizational resources and capacities into competences in tasks and processes related to the development of key competences [Matwiejczuk, 2011]. C.K. Prahalad and G. Hamel [1990] and M. Javidan [1998] list the following properties of key competences:

- they are difficult for competitors to imitate,
- they contribute to value-added creation,
- they have few substitutes,
- they produce a comparative advantage,
- their versatility allows them to be expanded into new markets and products.

Companies make competences the source of competitive advantages, at least short-term ones. G. Hamel and C.K. Prahalad [1994] and Javidan [1998] show how key competences should be identified and what direction they should take. They also associate them with value for clients and the organization, indicating that key competences are their sources.

Despite the many approaches to the identification of key competences, D. Walters and G. Lancaster [1999] explicit determination is neither obvious nor easy. In the retail industry, the method of customer service, product range, and price is a key prerequisite for conquering the market. Tesco, Metro Group, and Groupe Adeo are among the companies in the Polish market that place stress on such areas. To use a metaphor in K. Chan and R. Mauborgne [2005], they appear to be in a red ocean of bloody competitive fighting.

The development of innovative solutions in key competences is also determined by the numerous trends [Prah-lad, Krishnan, 2008] in stakeholder behavior [Pindelski et al., 2010], such as those of clients, suppliers, agents, and manufacturers. The key variable, however, is always the ability to offer unique value to the client, different from the solutions proposed by competitors. Ch. Aubrey and D. Judge, [2012], M. Christopher [2005] and enumerates the following conditions for the development of innovative solutions, which are particularly important in retail sales:

- transferring from a focus on supplier capacities to a focus on client preferences and expectations creating value for customers which is not about the price only the customers are increasingly aware of,
- implementing technology to develop customer centered solutions, setting technology to create value for customers, delivering seamless and enhanced experience among channels,
- changing from a *push* strategy (i.e., pushed by suppliers) to a *pull* strategy (i.e., pulled by clients), marking a change from a supply focused strategy to a demand focused one,
- use store networks to deliver customer focused logistics, omnichannelling, using all possible sales channels, stores sizes etc.,
- gathering and analyzing information on client preferences and expectations and replacing the maintenance of stock levels (while changing from supply to demand),
- developing relationships rather than performing single transactions,
- implementing integrated flow management in supply networks to replace alternate transportation and storage procedures,
- use the physical stores to retail a brands' point of difference and drive customers preference,
- transitioning from competition among single businesses to inter-network competition.

Ch. Aubrey and D. Judge, [2012], M. Christopher [2005] and K. Pousttchi and Y. Hufenbach [2014] give innovation a distinct dimension by indicating that retail innovativeness is conditioned by the development of all stakeholder networks. The skills of individuals

participating in value creation and innovative supply solutions comprise the variables that build their competitive positions. The interest on innovation in retail is growing covering all the industry areas from distribution procedures [Schniederjans, Cao, 2009], store locations, throughout stores interior design and equipment [Wolf, 2014] to omnichanneling. Thus the logistics are broadly understood to connect the network nature of stakeholder links with the retail, operational, and dynamic skills of store/megastore networks. Thus, this became the prime retail area of key competence, and this is where stress should be placed in the development of innovative solutions.

Logistics as the core competence of a retail organization

The development of innovative retail logistics for client value creation is determined by the logistics competence of an organization, which allows businesses to respond to client needs and offer solutions for specific buyer issues. Here, an important role may be played by specialized providers of logistic services (i.e., logistics operators) such as those participating in the 3PL logistics concept (Third Party Logistics) developed by 7PL [Hingley et al., 2011]. Creating a unique value for buyers translates into the integration of logistical activity in the value creation network; this implies that the company possesses unique resources, enabling the attainment of strategic targets [Andersen, 2011] and is related to the specific logistics-based business model [Sandberg et al., 2011]. An efficient and effectively functioning supply chain is a necessary precondition for and the first stage towards a network structure formation of supplies [Abrahamsson, Rehme, 2010]. In the 3PL concept, logistical solutions are processed from three perspectives: competency, the specific nature of the assets, and the level of integration of the cooperating parties. For retail organizations, particular attention is paid to the level of integration, defined according to four levels of business integration and cooperation. The higher level is characterized by the customization of logistics services – their adaptation to the needs and demands of clients, who can select from a wide range of standard services. The third level features the cooperation of forwarders and logistic service providers in finding solutions satisfactory to the client while distinguishing their actions from those of their competitors. The top level logistics solutions feature the key competences of the organization; this requires the possession of unique resources that not only enable tailor-made solutions to client needs but also establish long-lasting relationships based on long-term cooperation. Suppliers thus become network partners, and the resulting arrangements are based on cooperation among various entities, which builds a model of interchangeable relationships. The development of key competency and value creation thus forms a process engaging each network participant, whose commitment is verified by evaluating the key competences held by the organization throughout the entire network scale.

Innovativeness in logistics: innovative logistics

Innovative logistics aimed at maximizing efficiency indexes generally concern three areas:

1. Supplies, for which maximum reductions in resource capital freezing is the target.
2. Manufacturing, where implementing the *just-in-time* principle, increasing effectiveness, reducing unit costs and, adapting products to consumer tastes are the targets.
3. Distribution, where optimizing transportation processes is the target, by building distribution centers, automating commodity identification, computerizing retail network, and creating non-documentary records or product codification systems.

Logistics innovativeness plays an important role in value creation from the client's perspective and is significant for the organization's value performance. While researching logistics innovativeness excellence for the European Logistics Association (ELA), Pfohl [2007] lists the following elements of logistic innovation:

- the tendency to reduce process costs,
- the modularization/standardization of logistics services,
- the development of new services to satisfy client requirements,
- the satisfaction of current market demands.

While the European Union research indicates the future directions of innovations in logistics [24]:

- effective and ecologically balanced mobility,
- competitiveness of European transport systems,
- improved mobility,
- support for policy-making.

From the perspective of value chain participants, these are the logistics systems and networks with the most logistics innovativeness potential. They are the sources of the greatest capacities to adapt and be flexible. Thus, the ability to design logistics processes that support the creation of value both for the client and the organization appears to be the key to building basic competences. It also forces the close cooperation among entities, sometimes in competitive areas [Żukowska, Pindelski, 2012].

Jeronimo Martins Polska – a case study

History

Jeronimo Martins is an international Portuguese capital group dealing in food distribution, production, and services. The group's operations vary across its markets. The company, a logistics solutions pioneer in Poland, is an example of an organization that is aware of the need to strategize according to the success factors mentioned in the previous chapter and to develop internal improvement measures. Jeronimo Martins began operations in Poland in 1995, when its first Biedronka („Ladybug”) network stores were established (the company's only business area in Poland at the time). The company also owned Jumbo supermarkets and the Eurocash network. The explicit

business success experienced in Biedronka determined the strategic decision to focus on the development and expansion of the Biedronka stores for 20 years. Since 2012, the company has been developing Hebe, a network of Polish health, beauty, and pharmacy stores.

Competitive position and key competences

Jeronimo Martins is identified with the Biedronka brand in Poland. Its major business focus is a network of food stores. The company began operating in Poland in 1995 under the name „Jeronimo Martins Dystrybucja S.A.” and now owns 2.405 stores at more than 800 locations, the largest number in the country with plans to reach the number of 2.500 stores till the end of 2015 and 3.800 till the end of 2020. The company plans to overtake 11 stores of MarcPol its' recent competitor [25]. The allied company Jeronimo Martins Drogerie i Farmacja runs additional businesses, the Hebe health and beauty stores and pharmacies. Jeronimo Martins Polska has also run a café network, Kropka Relaks, since 2011. Main competitors run in Poland significantly lower number of stores, e.g., Carrefour more than 600, Lidl more than 500, Tesco 645. The way smaller convenient stores chain under brand Żabka (Little Frog) and Fresh Market plan to have 4.000 stores both till the end of 2015. The relative convenience and availability of Biedronka low-priced products have earned Biedronka and allied projects great popularity in Poland. Its 20 years of market experience have given Biedronka high recognizability among Polish clients. Several GFK Polonia opinion polls showed that 93% of respondents were brand aware and that 73% declared that they shopped at Biedronka regularly (two or three times a week). Another poll, by 4PR Mix [26], showed that 42% of Poles considered Biedronka their main and permanent venue for buying food.

The rapid success of the company was based on the competitive advantage achieved through low costs and ability to reduce prices till the level offered by bigger stores and malls located in less attractive locations. Achieving this required elements such as those listed below.

- The store is able to offer competitive prices to most of the competitor's stores fitting into the prices' range offered by main players. Although convenient locations and relatively small sizes of the stores may drive to the conclusion Biedronka can't compete on that field. Store offers daily foodstuffs at reasonably stable prices that however are not the lowest in the market. Consumers' basket analysis showed that 2012, 2013 Biedronka was preceded by nine of its competitors [27], 2014 by two [28] and 2015 took sixth place [29] in the ranking. It does not matter that comparisons were made by different entities and market baskets vary, all of the mentioned rankings 2012–2015 placed the Biedronka's prices above the price levels offered by some competitors hence it was not possible to lower the prices below that level, the innovations have been not sufficient or the management decided to do so arguing with their main company's slogan „low prices everyday”. Possibly by the innovative revolution Biedronka have been able to adapt likely to

prices' wars between most of the competitors following them. Ensuring the reasonable prices level is supported by placing single large-scale orders for products for the entire discount store network, more than 2100 stores. Low margins are possible through the company's high purchase and logistics efficiency and relatively low costs. It is to be mentioned that the level of prices Biedronka offers does not drift away from other competitors what makes the innovations reasonable.

- The store announces high product quality focus [30] and offers the quality satisfaction rule to its customers by working with proven and reliable limited number of 500 Polish suppliers only. The quality may be disputable however as, e.g., it was announced by the Pro-Test magazine [31] positioning the quality of milk offered by Biedronka as the lowest among the 14 brands tested. Nevertheless, their GS1 Databar technology offers innovative solutions for their products' best-before-date monitoring.
- The number of 500 suppliers was decreased in order to lower the cost of managing supplies. The company declares that regularly tests their products in laboratories, and by operating their own distribution system, guaranteeing relatively fast supplies to stores and thus providing product freshness. It also makes possible to announce and provide to customers special promotions related to the main topic as e.g., Italian or Indian cuisine week. The promotions are provided often, sometimes once a week what is not possible in many other chains of stores.
- The turnover of the Jeronimo Martins Poland reached 32 billion PLN (ca. 7,9 billion EUR) in 2013 and 35 billion PLN (8,4 billion EUR) in 2014 taking the first place in the rank among all the other chains of stores in comparison to main competitors as e.g., Tesco with 12,5 billion PLN in 2014 [32], Lidl with 11,5 billion PLN, Żabka (Little Frog) with ca. 5 billion PLN, and Leclerc 2,8 billion.

The dynamic development of the Biedronka discount network was a daunting challenge for Jeronimo Martins in terms of logistics and distribution. Their warehousing and transport facilities were gradually and proportionally adapted and expanded to match the retail network growth. This rapid development required them to prepare a new logistics strategy that served their more than 2400 stores. The whole idea derived from a key competence of the retail seen in a different way than it had been perceived by Biedronka and other players.

Unlike their competitors, Jeronimo Martins Polska identified their distribution-logistic network (3PL) as their key competence in around 2010. Since the main competitive advantage was defined as excellence in providing logistics and distribution, it could not be outsourced as was common for all the other market players. The exclusive logistics was replaced with a proprietary and sophisticated distribution system that allows company to create breakthroughs in delivering value to both customers and suppliers. Shallow responses such as negotiating with suppliers to lower products' prices were replaced

with deep changes, creating re-definitions and innovative approaches to distribution as a link between consumers and producers.

Logistic innovations at Jeronimo Martins Polska: Distribution center network

The company has their own logistics centers (playing an important role) and distribution centers (playing a less important role) covering a total area of 370.000 m², including warehouses, these have made the company somewhat independent. In addition to the reduced distribution costs, using the logistics centers has several other advantages. For example, it provides convenient accessibility to the transportation and service infrastructure. It also increases transportation flexibility and makes better use of the potential offered by 24-hour and mutual services, thus reducing operating costs through cooperation. Moreover, the expanded investment area also enables the transformation of further grounds into usable facilities without the need to bear the costs of power supply or access road infrastructure. The company thus uses the distribution centers' potential along with warehouses and extra office services.

The group's fifteen distribution centers [33] total an area of around 370 thousand m², while its trucks cover an annual route of 120 million km. A total of more than 1000 trucks carry over 15 million pallets every year. The firm's distribution centers employ around 2800 people. Every day, more than 2.5 million package units are dispatched from and accepted at the distribution centers. Just to show an example, the company's fifteenth distribution center was opened in Sosnowiec in the winter of 2014. Its task is to supply Biedronka stores in regions Zagłębie and Silesia, totaling ca. 170 stores within a radius of 60 km. The area covered by the center is 27 thousand m². The center has 155 trucks and employs directly and indirectly 530 people. It is the second distribution center in the city. The city's first center, established in 1997, supplies around 180 stores in adjacent regions [34]. The warehouses, managed in compliance with ISO 22000 standards, comprise the entire supply chain. The company tends to innovate according to the solutions applied in its centers and warehouses, which enable the efficient and effective satisfaction of system requirements.

Non-standard packaging

The company's use of non-standard product unit sizes is one of the key pioneering solutions that have enabled logistical efficiency and the resultant ability to offer prices different (in some cases lower) than those offered by their competitors. Some, high capacity products (e.g., Coca Cola, Piątynica cream, Tymbark juice) have their own unique package produced especially for the logistical needs of Jeronimo Martins. The consistent use of such packaging has translated into an efficient logistical operation. Thus, each element of the supply chain was adapted to the various product sizes, starting with the distribution centers and finishing with the transportation fleet. The atypical cubage of the unit packages presents a challenge

for the company's cooperation with trading partners, as the packages differ from those of other food stores. Moreover, the prices per kilogram or liter are labeled on the goods, giving the customers the opportunity to compare unit prices to the offers of other discount stores. Nevertheless the unique size of a product makes the price comparison difficult to the customer thus makes more space for prices' changes fitting them to the actual needs of the company and makes the downsizing sales technique possible [35]. The „scale effect” is a consideration for suppliers: the ability to offer their products at many points of sale may allow Biedronka to negotiate their manufacturers' consent for production in special packages. The company uses both standard pallets and special ones dedicated to specific product ranges.

Creating value by offering competitive prices for the end customer requires the continuous search for cost-cutting opportunities at every stage of distribution. The company cooperates with the suppliers directly, omitting the agents, which reduces costs. In addition, state-of-the-art IT solutions such as electronic invoices and documentation exchanges further optimize logistics expenses. The financial benefits, increased efficiency, and huge Polish business scale produced by the above strategies translate into low unit costs for the company's logistics tasks. The IT system links stores, Biedronka distribution centers, and, to some extent, suppliers warehouses and their production lines. Information flows partly automatically from a store to the suppliers production line checking availability of the product in each of the mentioned points. The product availability information is linked with the invoice and other documents creating, registry and archives systems as well as with the trucks routes planning that refers to lesser fuel consume, lower free trucks space while driving from-to stores and CSR issues same time.

Suppliers and product range

The company offers 500 brands and 900 product lines in its store shelves, of which the vast majority (more than 90%) are of Polish origin, supplied by more than 500 business partners [36] selected 2010–2014 from a wider range in previous years. The goods flow thus occurs largely within Poland. The innovative logistics of Biedronka goes far beyond the logistics solutions based on innovative distribution agents. The company's product range is identical across all its stores, as it strives to obtain the greatest product range standardization possible.

The stores have been divided into „Big,” „Super Big,” and „Small.” Part of the product range is dedicated to all of the stores and part to Super Big and Big stores; this is due to space capacities rather than product rationalization: a bigger store may be more „loaded” and can thus offer a better display. However, the region is also important: some goods sell better in some parts of Poland than in others. Thus, the distribution centers make relevant allocations based on regional sales data.

The cooperation and supply conditions are settled on the basis of purchases. The orders for permanent product ranges are made continuously, and the department of

supplies and logistics analyzes the average level of sales and most recent orders for the region. The observations update the IT systems allowing to forecast demand for some products in some locations. The system tends to be intelligent analyzing and implementing changes by itself, changes that are provoked by the situation in stores and distribution centers.

The warehouse stock is continuously supplemented under the same principle once every two days. Orders are filled by the supplier every two days as well. The goods are transported to the distribution center, where they are accepted, scanned, recorded in the system, and registered with the location of the pallet and relevant delivery information. The planning department allocates the goods and plans how many stores will place orders. After the orders are placed, they are filled at the warehouses (i.e., by preparing the packages of cartons for the stores). The FIFO (first-in-first-out) principle is applicable here. When collecting the goods to be dispatched, the system indicates automatically from which post the package with the earliest date must be picked up, as provided by the FIFO principle. As the product stock is made for two days (for dry goods), the item must be transported to the target point within three days, at the latest, between arrival at the distribution center and final destination. In addition, the automatic stocktaking of the stock levels using an electronic document interchange EDI through SAP, a document recording system, facilitates process management.

GS1 Databar system

The GS1 Databar, used to record information such as net product weight, batch labeling, and best-before dates and especially useful in warehouse management in the food sector, needs to be mentioned as one of the drivers of competitive advantage that has been integrated into the company's strategy and has influenced its logistics solutions. A particular advantage of the system is that it enables the encoding of small products (such as bulk products) that are difficult to mark with the traditional bar code.

Effects

The main effect of the solutions applied by Jeronimo Martins Polska while trying to attain the cost-price leadership strategy through innovative IT and logistics solutions is the consolidated image of a company guaranteeing foodstuffs at the reasonable low market price available in relatively comfortably for the customers located stores while also attending to the width and range of their product and their quality. It also allows the company to have same actions and promotions in all of the stores in the same time with sometime one week time distance from one action to another. In 2012–2014, the network enhanced its strong position in the Polish market; the company's Polish branch is now the development center for the entire capital group and the main source of its profitability. The group's 2014 global sales amounted to EUR 12,68 [37] billion with grow by 7,2% to 2013, while

the net sales of the Polish network grew by 9,1% y/y to EUR 8,43 billion. In 2012, Biedronka's billionth Polish client has been announced. According to the *Rzeczpospolita* newspaper [38], despite the economic slowdown, with its 9% annual growth in net profit and 17,9% increase in sales turnover, Biedronka became Jeronimo Martins' main brand for its Portuguese headquarters in July 2013, generating in 2013 64% and 2014 51% of its worldwide income. It is worth noting that the entire Polish food market grew only 2,3% during this period. During the 2013, Biedronka generated EUR 600 million EBITDA (Earnings Before Interest, Taxes, Depreciation, Amortization), and 2014 EUR 573,1 million. The EBITDA margin edged down that time from 7,8% in 2013 to 6,8% in 2014 [37] what might be the result of fierce price competition within the industry.

Summary

The case of Jeronimo Martins Polska illustrates the indisputable impact of innovative logistics on distribution organization success: logistics may be a key competence of organizations in this sector. Not only are the financial profits accruing from logistics innovation significant, but the application of non-standard solutions, exceptional in market innovation, appears to be important as well. The 20 years of Jeronimo Martins' activity in the Polish market reveals the gradual but consistent implementation of changes, producing a repeatable pattern that can be transferred directly to the corresponding organizational units in other countries such as Columbia, where (as stated on its official website [40]) Jeronimo Martins launched its retail businesses. Moreover, surveys suggest that significant number of Poles consider Biedronka as the trusted brand (34,8%) and the place to find the lowest priced of high-quality products (24%) [41]. The company's logistics are all covered by a confidentiality clause that does not allow the application of measurable economic indexes and prevents their proprietary solutions from being imitated and used by other companies.

In the future, logistics issues will more frequently involve online shopping, which will force organizations to implement changes to their logistic processes. New methods of organizing and improving business processes shall become necessary, particularly logistics processes that reduce delivery time and minimize cost and error indexes. Only structured actions based on specialist know-how will make companies innovation leaders and help them reach their targets for value creation (for themselves and their customers), the reduction of operational costs, their use of market potential, improved efficiency, and environmental sustainability.

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Przewaga konkurencyjna i kluczowe kompetencje: W jaki sposób Jeronimo Martins zwyciężył na polskim rynku detalicznym

Streszczenie

Celem artykułu było zwrócenie uwagi na fakt, iż identyfikacja kluczowych obszarów biznesowych w połączeniu z innowacjami oraz technikami zarządzania pozwala organizacji na kreowanie czynników przewagi konkurencyjnej i osiągnięcie wiodącej pozycji na rynku. Kolejnym celem artykułu jest podjęta próba udowodnienia, iż niektóre innowacje wewnętrzne wymagają znaczących zmian. Analiza spółki zajmującej się handlem detalicznym ilustruje powiązania w zakresie korelacji zachodzącej pomiędzy niestandardowymi formami konkurowania, innowacjami a rozwojem. Prezentowane wnioski, koncentrujące się na rynku polskim mogą być zastosowane względem dowolnego rynku, szczególnie w rozwiniętych sektorach gospodarki, charakteryzujących się konkurencyjnością i stałym rozwojem. Zawarty w niniejszej pracy opis przypadku, który nie skupia się wyłącznie na interesariuszach czy klientach, udowadnia, że nowe poziomy konkurencyjności są osiągnięte poprzez łączenie dziedzin, które nie są jasno powiązane wewnątrz organizacji. Choć obniżanie cen, zgodnie z wymogiem polskiego rynku, tradycyjnie było realizowane tak, aby obniżyć koszty produkcji, to Jeronimo Martins Polska zrewolucjonizował systemy zakupów, logistyki, magazynowania i składania zamówień oraz inne powiązane systemy, udowadniając, że istnieje ogromna przestrzeń zarządzania kosztami w tych dziedzinach. Inicjatywa firmy stworzyła nową przewagę konkurencyjną, która jest ściśle powiązana z krótkoterminową, wiodącą pozycją z zakresu kosztów, osiągniętą dzięki innowacjom i analizie danych.

Słowa kluczowe

innowacja, kluczowe kompetencje, detal, przewaga konkurencyjna