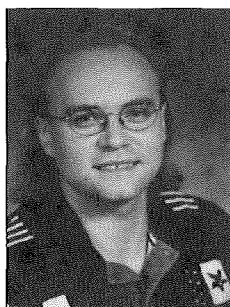


## IV. Efficient Consumer Response as a Hybrid Governance Structure to manage Customer Relationships in the Grocery Industry

**Herbert Kotzab**  
predavatelj  
Copenhagen Business School  
Danska



### Abstract

Efficient Consumer Response (ECR) is a cooperative strategy between retailers and manufacturers, which helps to fulfill consumer wishes better, faster and at less cost. ECR promises profits while facing stable and decreasing sales volumes. Although some studies show the positive effects of ECR as a governance structure on the overall performance, practitioners and academics still wait for the »big bang« from ECR. It seems that managers in the grocery supply chain still rely more on market exchange than on hierarchical structures.

**Key Words:** ECR, hybrid-integrative governance structures, grocery supply chain, customer relationship management

### Povzetek

#### ECR kot hibridni način upravljanja odnosov s potrošniki v prehrabeni industriji

Učinkovito odzivanje na potrošnike (ECR) je kooperativna strategija trgovcev in proizvajalcev, ki omogoča boljše, hitrejše in cenejše zadovoljevanje želja potrošnikov. ECR obljublja dobiček, tudi če obseg prodaje stagnira ali pada. Čeprav nekatere študije kažejo pozitivne učinke ECR kot načina upravljanja na delovanje podjetja, pa praktiki in akademiki še vedno čakajo na »eksplozijo« ECR. Zdi se, da menedžerji v dobavni verigi prehrabene industrije še vedno bolj zaupajo klasični tržni menjavi kot hierarhičnim strukturam.

**Ključne besede:** ECR, hibridno-integrativni načini upravljanja, dobavna veriga prehrabene idustrije, upravljanje odnosov s potrošniki

### 1. PROBLEM STATEMENT AND RESEARCH QUESTION

Since the 1980's, the grocery industry has undergone significant developments. Stagnant and decreasing markets have major impacts on the profit situation of these companies. This forces on one hand such players to rationalize wherever possible. On the other hand retailers still rely on price-driven competition (although facing in many countries – except the UK – a discouraging margin between -0.5 and +1.5 percent) (n.A. 2001, p. 8). Some retail players try to increase their sales

*Elektronski naslov avtorja:*  
hk.om@cbs.dk

Avtor predava predmet operativni menedžment (Operations Management) na Poslovni šoli v Köbenhavnu

volume by mergers and acquisitions (PwC 2000). Such actions are performed more and more on an international level and results in power shifts from the manufacturer side to the retailer side. In order to face the economic pressures, other retailers are following scale-oriented strategies (e.g. Olbrich 1999), which then leads to quasi-monopolistic market structures. A few retailers control the majority of the market.

This situation made representatives of the European grocery industry form the European Efficient Consumer Response (ECR)-Initiative in 1994. The goal of this group is set to reengineer the way business is done in the industry by implementing cooperative strategies between retailer and manufacturer to fulfill consumer wishes better, faster and at less cost (ECRE 1996, p. 1). This could be interpreted as the attempt of channeling information, organization and management to a seamless or borderless supply chain (Picot, Reichwald and Wiegand 2001). The result of ECR was assessed with savings of approx. 50 billion DM (at equal sales). Based on this promising result, various working groups published guidelines and manuals to be followed in order to succeed. The guidelines can be seen as manifested rules and recommendations on processes and standards between the ECR companies. The application of these rules should help the applying companies to escape the 'dilemma' of the industry.

Putting the phenomena to the area of managing customer relationships between markets and hierarchies, ECR presents itself twofold. On the one hand, the presentation of successful pilot studies or other success stories at various ECR conferences spreads a lot of optimism. On the other hand academia and business practice evaluate the ECR-rules and ideas with skepticism. Alvarado and Kotzab (2001) report on the difficulties of many ECR-suggestions to arrive at the next level after the introduction phase of an ECR-life cycle. Mouzas and Araujo (2000) refer thereby to plenty of promising pilot studies in the beginning of an ECR-partnership, which cannot be repeated in a continuing project. They refer thereby to the critical factor of the cooperation ability of the participants.

Nearly ten years after its introduction, it might be interesting to check if the ECR standards are stimulating the supply chain partners in a positive manner. Therefore, the paper at hand confronts the academic notions of collaborative management of customer relationships (as a form of supply chain management) with empirical results of ECR evaluation studies completed in selected supply chains.

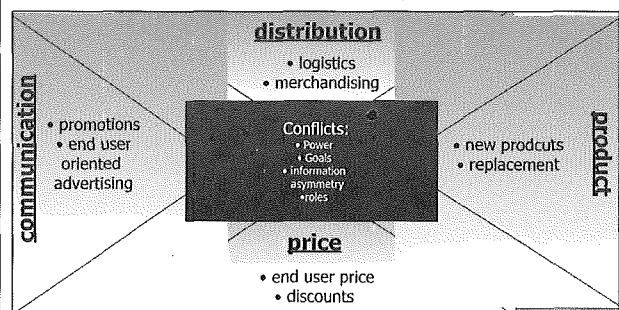
The results of this research are presented in several sections. After a short introduction to the problem, chapter 2 presents the theoretical ideas of how to manage the grocery supply chain from a market and hierarchy point of view. The third section presents ECR as a form of a hybrid-integrative governance structure. The assessment of the power of ECR to coordinate customer relationships within the grocery supply chain is done in the fourth chapter. The paper ends with a discussion on the results and an outlook for further research.

## 2. GOVERNANCE STRUCTURES IN THE GROCERY INDUSTRY

### 2.1. The changing character of the relationships between manufacturers and retailers

The competencies amongst manufacturers and retailers in the grocery supply chain had been clearly distributed for many years: Manufacturers produce, retailers distribute, and all activities between them had to be coordinated on a pure market exchange base, although having the option to move towards vertical integration (Schmitz Whipple, Frankel and Anselmi 1999). This so far valid working relationship has changed (Ahlert 1999, Meffert 1999) as too many conflicts have arisen, when the partners' interaction is driven only by the power of market exchange (see Figure 1).

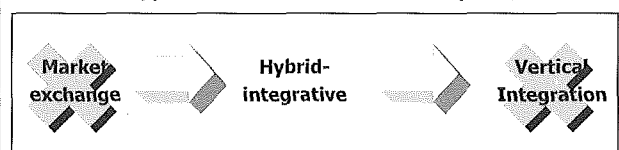
Figure 1: Conflicts and their causes between retailers and manufacturers (Meffert 1999, p. 413).



The price area could be seen as one example, where pure market exchange does not lead to satisfying results. Although price is the major mechanism in the relationship between manufacturer and retailer, the various 'price-setting and discount games' are leading to a zero-sum-result for all the actors (Meffert 1999, S. 413).

One possibility to escape these conflicts, caused by means of market exchange mechanism, could be seen in coordinating the different activities between the market partners. E.g. harmonization by vertical integration could help to face the stagnant markets (Ahlert 1999). However, for some reasons, Schmitz Whipple, Frankel and Anselmi (1999) do not assess a fully vertical integration as a successful option for the participants. It might be too expensive for a manufacturer to set up a nationwide distribution structure, or for a retailer to invest into production facilities. The solution had to be sought in the middle: getting to hybrid integrative structures. Such a form of a governance structure would increase the opportunistic behavior in the chain, but would help to safe the relationship between the partners (Schmitz Whipple, Frankel and Anselmi 1999, p. 45; see Figure 2).

Figure 2: Integrating hybrid-integrative governance structures to the grocery supply chain (adapted from Schmitz Whipple, Frankel and Anselmi 1999, p. 46).

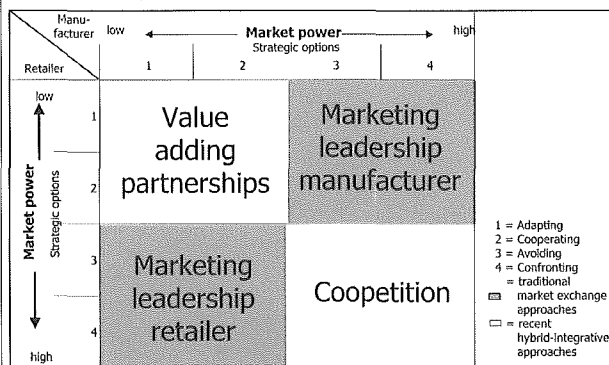


In the case of the hybrid-integrative governance structure, a strategic trust-based alliance could govern the dependency of the involved parties. It can then be seen as a variation of Williamson's (1987, p. 167) »credible commitments« or Heide's (1994) suggestion of non-market governance structures.

### 2.2. Developing hybrid-integrative governance structures in the grocery supply chain

By setting up such relationships, the partners recognize mutual interests controlling a certain behavior, which is then rewarded positively and/or negatively (Heide 1994). In this sense, Ahlert (1999, p. 342) suggests a customer oriented reengineering of the value added management in the channel. This should lead to profits for all (= win/win). By implementing party-controlled coordination mechanism, the relationships can be designed due to the partnership needs (see Figure 3).

**Figure 3: Designing customer relationships in the grocery supply chain between market exchange and hybrid integratives (Meffert 1999, p. 413).**



Still conflicts can be fought in a market exchange manner. However, depending on the power structure in the market, either retailers or manufacturers can dominate an exchange relationship. But if both partners agree on the strength of harmonization, value adding partnerships<sup>1</sup>, or co-opetition models (= »a revolutionary mindset that combines competition and cooperation « –Brandenburger and Nalebuff 1996)<sup>2</sup> can be applied. Both forms would apply to Schmitz Whipple, Frankel and Anselmi's (1999) hybrid-integrative governance structure proposal.

### 3. EFFICIENT CONSUMER RESPONSE FROM A HYBRID-INTEGRATIVE GOVERNANCE STRUCTURE PERSPECTIVE

This section should discuss ECR beyond the stated co-opetition suggestion. Interpreting ECR as a form of interfirm coordination, Stank, Crum and Arango (1999) confirmed in

<sup>1</sup> These could occur through different dependence structures (e.g. Benetton's vendor integration in Italy – see Johnston and Lawrence 1988).

<sup>2</sup> Here is the optimization of a single system only possible by optimizing the total system (e.g. Intel efforts in the PC industry).

their study the benefits of such an arrangement for the involved companies.

### 3.1. Efficient Consumer Response – understanding, model and parameters

ECR is a strategy of »how partners in the supply chain can best synchronize the flow of product through the distribution pipeline from point of manufacture to point to final sale« (Martin 1994, p. 377). Various attempts to define ECR show that ECR is primarily related to strategic partnerships in the distribution channels of the grocery industry to increase the performance of the consumers (Salmon 1993, JIPOECR 1996a, ECRE 1996, ECRE 1997).

The vision of ECR is to set up a consumer-driven distribution system in which the production is permanently managed by the consumers' POS-activities (according to Salmon 1993). The realization of this strategy is based originally on four pillars, which had been 'customized' to two strategy blocks for the European market (see Table 1).

**Table 1: Comparison of ECR-modules (based on Salmon 1993, ECRE 1996)**

		Efficient Consumer Response modules			
		US-American version		European version	
Efficient Store Assortment	Providing a complete, easy to-shop, assortment of products wanted by the consumers	<b>Demand Management</b> Demand Strategy & Capabilities Optimize Assortments    Optimize Promotions Optimize New Product Introductions    Consumer Value Creation		<b>Enablers</b> Common Data & Communication Standards Cost/Profit and Value Measurement	
Efficient Promotion	Harmonizing the promotion activities between manufacturer and retailer by communicating benefits and value				
Efficient New Product Introduction	Developing and introducing new products the consumers really want by meeting their ultimate needs.	<b>Supply Management</b> Supply Strategy & Capabilities Responsive Replenishment    Operational Excellence    Integrated Demand Driven Supply		<b>Integrators</b> Collaborative Planning E-Business Business to Business	
Efficient Replenishment	Maintaining high in-stock levels of the required assortment				

As a result, ECR-application leads to increased productivity. The optimal combination of these areas leads to a benefit for the members of the supply chains of US-\$ 30 billion in the US and DM 50 billion within Europe (according to Salmon 1993, p. 4 and ECRE 1996).

The savings result mostly from total-chain reduction of inventory by speeding up cycle-time. These results had been documented in a lot of series published by the various ECR-working groups and other organizations. The studies include rules and case studies, which can be used as benchmarks (FMI 2000, ECRE 1996, ECRE 1997, ECRE 2000, ECRA 1997 and 1999, ECR-Italy 1997, ECR-Espana 1997 or ECR-Danmark 1999).

### 3.2. ECR's distinctiveness

The basics of ECR are quite simple and refer to harmonization and cooperative adaptation of commonly agreed business processes and standards that can help to avoid duplications of costs. Its originality might be seen in the request towards

common endeavors to harmonize the customer relationships between the involved market partners, such as:

*Centralization and Standardization:* Centralizing the flow of goods eliminates unnecessary inventory levels thus leads to increased profits. Implementing supply chain wide IT and organizational standards reduces insecurity in the market place, reduces inventory and leads to a steady flow of goods and related information.

*End user orientation by postponement:* The design and the optimization by ECR are controlled by the end user (meaning the POS-data). Bullwhip effects can be reduced and out of stock situations at the P.O.S can be avoided, if an integrated access to this data is guaranteed. The assortment of end user oriented categories has to be done in close conjunction between retailers and manufacturers.

These rules have been enthusiastically welcomed by practitioners and promoted by strategic interest groups, but also heavily criticized. The criticism reflects to the innovation degree of the model itself and its rationalization power. Some authors refer to precursor models such as plan-agreed marketing, reverse marketing (Tietz 1986) or even 'antique' suggestions of continuously to be replenished shelves by Procter and Gamble of 1919 (Sherman 1994). Other authors doubt the internal and external validity of the presented ECR-results due to non presented methodology in the case of empirical data or missing conceptual explanations in the case of presenting theoretical notions (Kotzab 1999). But the most negative analysis of ECR refers to the degree of its implementation. Representatives from both, academia and business practice, miss a »big bang« from ECR. The headlines of trade journals continue to ask: »What's up with ECR« (Tosh 1998), »Is ECR dead?« (Matthews 1996) or »ECR: More promise than performance« (Matthews 1997).

**4. ASSESSING THE POWER OF ECR AS A HYBRID GOVERNANCE STRUCTURE**

ECR as a form of cooperative strategies (= quasi-hierarchical approaches) can increase the profits in the supply chain. After introducing the strategic ideas of ECR and some critical thoughts, it would be interesting to know, whether ECR is applied in its sense or not. The paper at hand presents two selected studies, which portray the state of the art of ECR-implementation in its investigated supply chain.

The implementation of ECR was and is permanently evaluated either by the ECR-member-companies themselves or by other independent academic or research institutions (Biggs 1999, Werdenich & Kotzab 1999, Salmon 1999, Brown & Visconti 1996, ECR-Danmark 1999, JIPOECR 1996b, JIPOECR 1998). The goal of these studies is to identify the state-of-the art of the execution of the suggested standards; rules and processes within the related supply chains. Another goal of these studies is to meet the upcoming disapproval with the ECR philosophy.

**4.1. The implementation of ECR Industry in the United States**

**4.1.1. Goals and methodology of ECR-USA implementation studies**

On the occasion of the 1999 Annual conference of the Council of Logistics management, Biggs (1999) presented the results of two benchmarking studies, which had been conducted by Kurt Salmon Associates and the ECR Operating Committee in 1997 and 1999. Both studies had been conducted on survey bases by using special developed ECR-scorecards to measure 20 key ECR practices (see JIPOECR 1998 and JIPOECR 1996b).

The scorecard considers five levels of implementation, where 0 represented little or no implementation and 4 represented advanced implementation. The calculation of a special ECR-maturity index (where all level 3 and 4 results are combined) than specifies the level of ECR implementation.

Unfortunately, Biggs (1999) does not report any information on the sample size and response rate of the study, which was conducted in 1999. Therefore a final conclusion towards internal validity of the presented results is not possible.

However, referring to the 1997 study, the Joint Industry project on Efficient Consumer Resonse (1998) has published a report, where the methodology used is available in the appendix. The monitoring itself refers to a survey based questionnaire design, which has been mailed to 108 leading companies (38 manufacturers, 48 distributors, 22 brokers). The response rate is reported a total of 74 %. The appendix does not include the questionnaire<sup>3</sup>.

**4.1.2 Selected results and discussion**

**Results**

The following Table 2 shows the results of the Maturity-Index calculation among the respondents in 1997 and 1999 as well as the plans for the next three years.

**Table 2: ECR-Maturity Index in the US (Biggs 1999)**

ECR-Field	1997	1999	change 97/99 in %	goal in 3 years time
Efficient Replenishment	38	38	-	90
Category Management	33	46	39.4	95
Efficient Promotion	31	21	-32.3	93
Efficient Assortment	30	37	23.3	93
Efficient Product Introduction	25	25	-	92

The maturity indices in 1999 do show a slow growth in the various areas (except category management, where most of the efforts have been done). Efficient promotion seems to be less important than before. None of the numbers show an achieved ECR competence over 50 % meaning that none of the firms in the sample did actually implement half of the ECR practices.

<sup>3</sup> The author of the paper at hand consequently draws the conclusion, that Biggs's (1999) study relates to the same methodology.

### *Benchmarking Efficient Replenishment*

The study reports the high implementation of cross-functional teams, which can be seen as a supporting organizational structure for ECR. A closer look to the EDI-capabilities within this field shows in some extent rather low usage rates of the suggested EDI-standards. 62 % of the retailers and 83 % of the wholesalers have not begun to use the ASN-EDI-standard (Advanced Shipping Notification). 100 % of all suppliers and distributors are able to transmit orders.

Also astonishing is the low competency in using bar codes in this area. Only a fifth of all suppliers are seen as that competent in applying industry standard bar coded shipping labels.

Totally, ER is considered to work superior for few retailers, but is not applicable to the majority. Biggs (1999) indicates that most of the failures refer to using ER as a stand-alone strategy.

### *Benchmarking Category Management, Efficient Assortment and Efficient Product Introduction*

Category management shows the strongest maturity index among the analyzed areas. Performance analyses are showing that companies who do perform category management are faced with improvements in profitability and sales between 2.5 to 6.5 %. It seems that within the US grocery industry, retailers are more advanced in category management implementation than wholesalers. Interestingly enough, manufacturers more superior in efficiently using space than distributors. In the field of new product introduction, manufacturers had improved, while distributors are still lacking competencies.

### **Discussion**

In 1996, the Joint Industry Project on Efficient Consumer Response, published its second progress report on ECR (JIPOECR 1996a). According to these results, more than 50 % of the respondents indicated to have fully or partially implemented some ECR-practices. More than 90 % of the top management show a high commitment toward ECR. The study predicted the reaching of the critical mass of 30 % of all industry volume to be treated under ECR in 1997.

According to Biggs (1999), ECR has never fully reached its potential as it was claimed in 1993. Still, logistics processes in form of continuous replenishment techniques remain crucial for the success of ECR. Nowadays, category management is seen as an additional cornerstone. In fact, there are no wide-ranged »breakthrough results«, expect some exclusive, mostly smaller retailers (like Wegmans).

Interestingly enough, Biggs' critique aims more to manufacturers than retailers. Manufacturers still remain on some 'old management traditions' like forward buying and non-alignment strategies. The study also showed a high degree on mistrust within the channel.

## **4.2. The implementation of ECR in Europe – The Austrian Example**

### **4.2.1 Goals and methodology of the ECR-Austria ECR-monitoring**

The Austrian ECR-initiative has been established in 1996 and can be seen as one of the most successful initiatives of the European ECR world. ECR-Austria consists of 65 member companies and more than 220 managers, who have worked out in several working groups a basic ECR-business model that considers business processes and standards (ECRA 2000). ECR-Austria installed one tool to evaluate its progress permanently (ECRA 1999): The ECR-Monitor. Up to now, the monitor has been used to prove the ECR-progress for three times in May 1998, November 1998 and in May 1999. The goal of the ECR-Austria Monitor is to benchmark the progress of the ECR-implementation amongst the member companies and to compare the Austrian efforts with other European ECR-initiatives. The monitor is based on a standardized questionnaire that was mailed to each member company. The response rate showed increasing tendency. Out of 64 member companies, 42 companies returned the instrument in the third round (May 1998: 34; November 1998: 38).

### **4.2.2 Selected results and discussion**

#### **Results**

Table 3 shows selected results of these studies, based on the presentation in the second ECR-Austria manual (ECRA 1999).

**Table 3: Compressed results of the Austrian ECR-monitoring studies**

ECR-standards and processes as suggested in the manual in use	Nov. 1998	May 1999
Efficient Unit load standards:		
• e.g. EAN 128 transportation label on pallets	34 %	47 %
Electronic Data Interchange standards:		
• e.g. EDI-message set INVOIC (invoicing)	31 %	33 %
Efficient Replenishment standards:		
• e.g. Continuous Replenishment programs	27 %	29 %
Category Management standards:		
• tactical focus on assortment	80 %	79 %
• tactical focus on promotion	53 %	59 %

Overall, the published results of this monitoring process draw an enthusiastic picture of ECR in Austria. The ECR-Austria officials announce that ECR has been proven theoretically and practically as a major success (ECRA 2000).

#### **Discussion**

Besides this official monitoring tool, Werdenich & Kotzab (1999) completed a kind of a validation study to this monitoring methodology. Based on a standardized questionnaire, Werdenich & Kotzab (1999) tried to evaluate the perceived qualitative and quantitative value of the different ECR-tools. Especially when it comes to the qualitative perceived value, some interesting results appear, which might conflict with the overall published ECR-euphoria:

- While most of the suggested Efficient Unit Load standards are not perceived as implemented, especially manufacturers could identify potential savings by avoiding re-supplies in the field of Efficient Unit load.
- Around 40 % of the respondents make out incompatibilities of their IT-systems. Only 1/5 of the sample indicates quite a reasonable fit in IT. Although IT is seen as the major force for cost reductions, only 35 % of the sample report such decreases in telecommunication costs.
- When it comes to replenishment, one of the most crucial processes of ECR, nearly half of the suppliers in the sample do not see any cost improvement by following the suggested norms.
- Although Category management shows the best results in the ECR-monitor, the interviewed executives in this particular study do not confirm this fact. The concerned managers indicate, that they are facing – more or less – the same situation as before the implementation of ECR.

The results show also, that ECR standards do not seem to be widely applied in Austria yet. Based on the analysis of four additional in-depth-interviews with selected executives and additionally reviewed current business literature the following three incidents could probably be interpreted as potential barriers for implementing ECR: Power structure, reluctance to exchange sales data and mistrust.

While power structure refers to the highly concentrated Austrian market where two retail chains generate approx. 70 % of the total sales volume, mistrust is the general attitude of having doubts about the actions taken by the other supply chain members. The reluctance to exchange sales data probably attributes to the worries of top management retail executives towards a misuse of the information. In the past, too much happened which does not allow the cooperative ideas of ECR immediately.

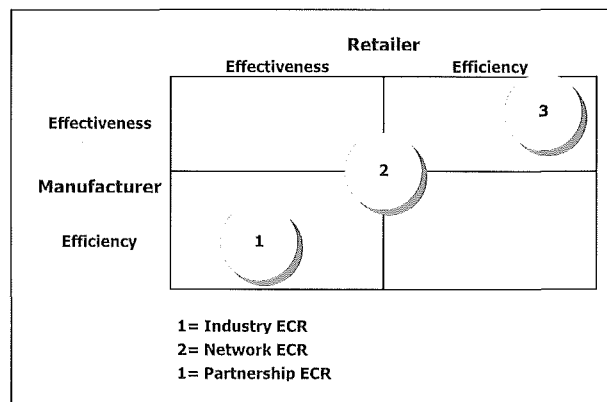
But, the studies examine only such ECR-standards, that are applied by member companies of ECR-Austria. This 'blind-spot' is recognized by the Austrian ECR-committee (ECR-A 1999, p. III/4).

#### 4.3. Does hybrid-integrative governance thinking fail in the grocery industry?

The basic ideas on ECR had been presented in 1992/1993, within seven years of apply ECR within the industry, the managers are far away of realizing the »30 billion promise«. Still, we can identify a low usage of ECR-related business processes within the grocery industry.

Taking Corsten's (2000) distinction of different forms of ECR (industry, network or partnership ECR; Figure 4), the current ECR movements are in the industry area with a low level of interdependence and a low level of coordination.

Figure 4: Different stages of ECR (Corsten 2000, p. 151)



The goal of ECR in that stage is to gain critical mass in order to move to the next step, where only selected players collaborate (= network). The final stage is reached by cooperating in a dyadic partnership.

However, comparing the evaluation studies presented in the previous sections, it seems that both supply chains (USA and Austria) did not have reached critical mass yet. Both studies show rather discouraging results for supporting the execution of hybrid-integrative governance structures in the grocery supply chain. The empirical results would reject the notions of Schmitz Whipple, Frankel and Anselmi (1999), who favor coordination thoughts to be rewarding for the grocery industry.

The German office of Kurt Salmon Associates had presented some critical issues, which can be considered as implementation barriers of ECR within the companies (Salmon 1999). As they point out, there is a lack on top-management support and non perceived change.

## 5. CONCLUSIONS

### 5.1. Managerial implications

In 1992/1993, ECR was introduced as the strategic 'weapon' for dramatically change of the way business is performed in the grocery supply chain. Since that time, several pilot studies had shown that in fact, companies can gain huge savings potentials, but the consumer still is waiting for his/her share of ECR-profits (Biggs 1999).

It looks like if all parties expected major short-term results, primarily based on the phenomenal savings promised by the original ECR promoters. In fact, ECR is a long-term strategy and this is forcing the participating managers to completely rethink and consequently rearrange the way business has always been done.

The practical importance of the phenomena for managers is

<sup>4</sup> The authors proofed that ECR in Austria followed exactly Heide's (1994) presented steps of implementing bilateral non-market governance structure agreements, but the involved companies do not pursue their strategy.

still given, looking at the number of ECR conferences with thousands of participants all over the world. Practitioners are waiting for recommendations to solve their supply chain problems in the grocery industry and take any promising advice into account while planning their business portfolio. Recently, Corsten (2001) found out that 37 % of the total performance of a company might be due to ECR. This result should motivate managers of the grocery supply chain to rethink their existent customer relationship management strategies.

## 5.2. Research outlook

Although Picot, Reichwald and Wiegand (2001) refer to the advantages of ECR by integrating the total chain by implementing channel-wide standards (= replacing of market exchange by hierarchical mechanism), companies in ECR-systems do not apply their own suggested standards (see Alvarado and Kotzab 2001).

Future research should

- address the bottleneck-problem in the diffusion of ECR;
- aim towards the examination of the requirements for customer relationships for setting up ECR-driven relations and
- and deal with the measurement of the ECR success and critical success factors and implementation barriers of implementing ECR.

## SKLEPI

### Upravljalški vidiki

Leta 1992/1993 je bil vpeljan ECR kot strateško »orožje« za dramatično spremembo načina poslovanja v dobavni verigi prehranske industrije. Odtlej so številne pilotske študije pokazale, da lahko podjetja dejansko ogromno privarčujejo, vendar pa potrošnik še vedno čaka na svoj delež dobička od ECR (Biggs, 1999).

Videti je, kot da bi vse vpletene strani pričakovale velike kratkoročne rezultate, v prvi vrsti osnovane na visokih prihrankih, ki so jih obljubljali prvi zagovorniki ECR. V resnici je ECR dolgoročna strategija, ki vključene menedžerje sili, da ponovno zastavijo in posledično popolnoma spremenijo način, na katerega upravljajo posel.

Praktičen pomen fenomena za menedžerje je še vedno viden, če sodimo po številu konferenc ECR s tisočnimi udeleženci po vsem svetu. Praktiki so željni priporočil, kako naj rešijo probleme v prehranski industriji, in upoštevajo vsak obetaven nasvet, ko načrtujejo svoj poslovni portfelj. Pred kratkim je Corsten (2001) ugotovil, da je 37 odstotkov izkupička lahko posledica ECR. Ta rezultat bi moral motivirati menedžerje v dobavni verigi prehranske industrije, da ponovno zastavijo obstoječe menedžerske strategije upravljanja odnosov s potrošniki.

## Raziskovalni pogled

Čeprav Picot, Reichwald in Wiegand (2001) navajajo prednosti ECR pri integraciji celotne verige na osnovi vzpostavitve splošnih standardov (=zamenjavo klasične tržne menjave s hierarhičnimi mehanizmi), podjetja z sistemi ECR lastnih standardov sploh ne uporabljajo (glej Alvarado in Kotzab, 2001).

Prihodnje raziskovanje se mora:

- lotiti problema »ozkega grla« pri razširjanju ECR
- preučiti želje po odnosih s potrošniki po vzpostavitvi odnosov na temelju ECR
- lotiti merjenja uspeha, kritičnih dejavnikov uspeha in ovir pri uveljavljanju ECR.

## REFERENCES

- Ahlert, D. (1999), »Vertikalisierung der Distribution. Die kundenorientierte Neugestaltung des Wertschöpfungsprozess-Managements«, *Distribution im Aufbruch. Bestandsaufnahme und Perspektiven*, Beisheim, O. (ed.), Vahlen, pp. 333-350.
- Alvarado, U. and Kotzab, H. (2001), »Supply Chain Management. The Integration of Logistics in Marketing«, *Industrial Marketing Management*, 30, 2, pp. 183-198.
- Biggs, D. (1999), »Efficient Consumer Response. Where We've Been and Where We're Going«, *Presentation at the Council of Logistics Management Annual Conference*.
- Brandenburger, A. and Nalebuff, B. (1996), *Co-opetition*, Doubleday.
- Brown, P. & Visconti, M. (1996): »Progress to Date and the Way Forward«, *Presentation at the 2<sup>nd</sup> Official ECR Europe Conference, Amsterdam, Netherlands*.
- Corsten, D. (2000), »Standards, Processes and Capabilities – A New View on Co-operation in the Consumer Goods System«, *Logistics Research Network 2000 Conference Proceedings*, Hines, P. (ed.), Cardiff, UK, pp. 147-152.
- Corsten, D. (2001), »Implementation and Success of ECR in Europe«, *Presentation at the 6<sup>th</sup> ECR Europe Conference in Glasgow*, May 15-17.
- ECR Europe (ECRE) (2000), »ECR Europe – National initiatives«, <http://www.ecrnet.org/ECR/ecr.home>, 2000/02/17.
- ECR-Danmark (1999), *M?ling af ECR, implementering. – holdninger og – barrierer*, 2. officielle ECR konference, Bella Centret, 28.10.1999.
- ECR-España (1997), *Results of Phase I of E.R. in Spain. The Vision of E.R.-Spain, Opportunity Framework and Pilot Projects Definitions*, ECR-España, Barcelona.
- ECR-Italy (1997), *The supply chain pilot projects results. Management summary report*, ECR Italia, Milano.
- ECR-Österreich-Initiative (ECRA) (1997), *ECR-Handbuch Österreich*, ECR-Österreich, Wien.
- Efficient Consumer Response Austria (ECRA) (1999), *ECR Handbuch II*, ECR-Österreich, Wien.
- Efficient Consumer Response Austria (ECRA) (2000), *Efficient Consumer Response*, <http://www.edi.org/ecr/start.html>, 27.05.2000.
- Efficient Consumer Response Europe (ECRE) (1996): *European Value Chain Analysis. Final Report*.
- Efficient Consumer Response Europe (ECRE) (1997): *CEO Overview – Efficient Consumer Response*.
- Food Marketing Institute (FMI) (2000): [http://www.fmi.org/pub/Pubs\\_searchresults.cfm](http://www.fmi.org/pub/Pubs_searchresults.cfm), 2000-05-27
- Heide, J. (1994), »Interorganizational Governance in Marketing Channels«, *Journal of Marketing*, 58, 1, pp. 71-85.
- Johnston, R. and Lawrence, P. (1988), »Beyond Vertical Integration – The Rise of the Value-Adding Partnership«, *Harvard Business Review*, Vol. 66, No. 4, pp. 94-101.
- Joint Industry Project on Efficient Consumer Response (JIPOECR) (1998), *1997 ECR Industry Benchmarking Survey*, Grocery Manufacturers of America.
- Joint Industry Project on Efficient Consumer Response (JIPOECR) (1996a), *ECR 1995 Progress Report*, Grocery Manufacturers of America.
- Joint Industry Project on Efficient Consumer Response (JIPOECR) (1996b), *The ECR scorecard*, Grocery Manufacturers of America.
- Kotzab, H. (1999), »Improving supply chain performance by Efficient Consumer Response? A critical comparison of existing ECR-approaches«, *Journal of Business and Industrial Marketing*, Vol. 14, Issue 5/6, pp. 364-377.

- Martin, A. (1994), »The ultimate ECR strategy«, *Annual Conference Proceedings. Cincinnati, Ohio, October 16-19, 1994*, Council of Logistics Management (ed.), Chicago: Council of Logistics Management, pp. 375-391.
- Matthews, R. (1997), »ECR: More promise than performance?«, *Progressive Grocer*, April, pp. 26-28.
- Matthews, R. (1996), »Is ECR dead?«, *Progressive Grocer*, September, pp. 28-32.
- Meffert, H. (1999), »Zwischen Kooperation und Konfrontation: Strategien und Verhaltensweisen im Absatzkanal«, *Distribution im Aufbruch. Bestandsaufnahme und Perspektiven*, Beisheim, O. (ed.), Vahlen, pp. 407-424.
- Mouzas, St. and Araujos, L. (2000), »Implementing programmatic initiatives in manufacturer-retailer networks«, *Industrial Marketing Management*, 29, 3, 293-303.
- n.A. (2001), »Wieviel verdient der LEH in Österreich wirklich?«, *Key Account*, 6, p. 8
- Olbrich, R. (1999), »Überlebensstrategien im Konsumgüterhandel«, *Distribution im Aufbruch. Bestandsaufnahme und Perspektiven*, Beisheim, O. (ed.), Vahlen, pp. 425-442.
- Picot, A., Reichwald, R. and Wiegand, R. (2001), *Die grenzenlose Unternehmung. Information, Organisation und Management*, 4th edition, Wiesbaden.
- PriceWaterhouseCooper (PwC) (2000), »European Retailing 2010«, <http://www.idealbeat.com/ResLib/pricewaterhouse/euroretail2010/page1.htm>
- Salmon, K. (1993): *Efficient Consumer Response. Enhancing Consumer Value in the Grocery Industry*, FMI, Washington.
- Salmon, K. (KSA) (1999), *ECR Outlook 1999 - Eine Studie von ksa zum Status und zur Weiterentwicklung von ECR in Europa*, Düsseldorf.
- Schmitz Whipple, J., Frankel, R. and Anselmi, K. (1999), »The effect of governance structures on performance: A case study on Efficient Consumer Response,«, *Journal of Business Logistics*, Vol. 20, No. 2, pp. 43-62.
- Sherman, R. (1994), »ECR - another acronym or a real opportunity«, *Transportation & Distribution*, June, p. 60.
- Stank, T., Crum, M. and Arango, M. (1999), »Benefits of Interfirm Coordination in Food Industry Supply Chains«, *Journal of Business Logistics*, 20, 2, pp. 21-42.
- Tietz, B. (1986), *Optionen bis 2030. Szenarien und Handlungsalternativen für Wirtschaft und Gesellschaft in der Bundesrepublik Deutschland, ein Handbuch für Entscheidungsträger*, Bonn Aktuell.
- Tosh, M. (1998), »What's up with ECR?«, *Progressive Grocer*, December, pp. 8-12; 21.
- Werdenich, D. & Kotzab, H. (1999), *Bestandsaufnahme Efficient Consumer Response (ECR) in Österreich*, Wien.
- Williamson, O. (1987), *The Economic Institutions of Capitalism*, The Free Press.