

Tomasz Budzik

Czestochowa University of Technology
e-mail: tomasz.budzik@wz.pcz.pl
ORCID: 0000-0001-7904-2884

Anna Budzik

Czestochowa University of Technology
e-mail: anna.budzik@wz.pcz.pl
ORCID: 0000-0001-5870-2847

AN ASSESSMENT OF THE IMPACT OF CUSTOMERS AND SUPPLIERS AS COMPETITIVE FORCES IN POLISH CAR COMMUNICATION ENTERPRISES

OCENA ODDZIAŁYWANIA KLIENTÓW I DOSTAWCÓW JAKO SIŁ KONKURENCYJNYCH W PRZEDSIĘBIORSTWACH KOMUNIKACJI SAMOCHODOWEJ

DOI: 10.15611/pn.2019.7.16
JEL Classification: D40, L11, L32, L92

Summary: The aim of the article is to assess the impact of recipients and suppliers on the state-owned PKS enterprises. A non-random choice was used to select a research sample. The choice was deliberate with the use of the appropriate criteria. The enterprises forming the strategic group and at the same time being the research group were selected. The qualitative methods were used in the research. The article uses Porter's Five Forces Framework tool. On the basis of the partial analysis of Porter's Five Forces, it is stated that the surveyed enterprises have a stronger influence on the suppliers than on the customers. The functioning of the surveyed group of enterprises is significantly dependent on suppliers. In turn, the customers of the examined group of enterprises affect its functioning to a small extent. The article aims to fill the research gap existing in the lack of in-depth research in the field of strategic analysis on these enterprises. The presented research can be used to create an individual strategy and achieve a competitive advantage of each company in the strategic group.

Keywords: regional transport, car communication enterprises, PKS, environmental analysis, Porter's Five Forces.

Streszczenie: Celem artykułu jest ocena oddziaływania odbiorców i dostawców na przedsiębiorstwa komunikacji samochodowej należące do sektora publicznego. Do doboru próby badawczej posłużono się wyborem nielosowym. W badaniach zastosowano metody

jakościowe. Na podstawie przeprowadzonej częściowej analizy Pięciu Sił Portera stwierdza się, że na badane przedsiębiorstwa silniej oddziałują dostawcy niż odbiorcy. Funkcjonowanie badanych przedsiębiorstw w znaczny sposób jest uzależnione od dostawców, a odbiorcy badanej grupy przedsiębiorstw oddziałują na jego funkcjonowanie w niewysokim stopniu. Jednak siła ta jest na tyle duża, że powinno się ją uwzględnić przy tworzeniu strategii. Artykuł uzupełnia lukę badawczą polegającą na braku dogłębnej analizy strategicznej dotyczącej przedsiębiorstw PKS. Przedstawione badania mogą zostać wykorzystane do tworzenia indywidualnej strategii i osiągnięcia przewagi konkurencyjnej każdego przedsiębiorstwa z grupy strategicznej.

Słowa kluczowe: transport regionalny, przedsiębiorstwa komunikacji samochodowej, PKS, analiza otoczenia, Pięć Sił Portera.

1. Introduction

The beginning of the 90s was a period of construction of a new economic system for the countries of Eastern Europe. Poland, which belonged to this group, also transformed the system of socialist economy into a market economy [Kozłowska 2011, p. 101].

The hyperinflation which was growing at that time and the deteriorating economic crisis forced Mazowiecki's government and its advisers to take quick and comprehensive remedial actions [Kramer 1995]. Poland was one of the first, along with Hungary and Estonia, to become an East European country that had to implement economic shock therapy [Swadźba 2018, p. 294] also known as the Big Push [Aslund 2010]. It required fast changes aimed at a rapid departure from the communist times [Kramer 1995].

For this purpose a program was launched in which one can distinguish three main policies. These are macroeconomic stabilization, liberalization of prices [Balcerowicz, Bratkowski 2001] and commercial transactions [Desai 1997, p. 54], restructuring and privatization [Grosfeld, Roland 1995]. The first two assumptions were achieved at an early stage of the program. However, policies including restructuring and privatization have proven to be more difficult to implement [Kramer 1995].

One of the examples of difficulties in restructuring and privatization are the PKS (Polish name of the state owned car communication enterprises). Free markets have significantly affected the activities of these entities. Besides bus transport, they started alternative activities such as the sale of fuels or the provision of motor vehicle repair services. In the initial period of the free market, these entities obtained good financial results. Over time, as more and more competition grew on the part of private enterprises, their results deteriorated. Greater attention was paid to maintaining the existing network of connections rather than to the capitalist issue of competitiveness [Taylor, Ciechański 2017].

In 1990, there were 167 Automobile Transport Companies [Budzik 2017b, p. 53], but the majority were privatized only when the Act on Commercialization and Privatization of State Enterprises was in effect, ie at least six years later [Ustawa... 1996]. Over the period 1995-2016, 85 enterprises were privatized, 31 were liquidated, and 18 went bankrupt [Budzik 2017b, p. 53].

The existing state-owned PKS inherited many defects from the communist era. In those times capital expenditure was dependent on the state policy. The money was invested in heavy industry, ignoring the basic needs of consumers and reorienting trade from Western Europe to the Soviet Union [Sachs 1993, p. 5]. The issue of suppliers was also neglected, because in a planned economy central authorities decided everything [Jewtuchowicz 1997, p. 17].

In 2008, it was indicated when examining all Automobile Communications Companies, that their financial situation was bad [Dyr 2013]. The research carried out in the following years only confirmed this fact [Abramowicz, Ziółkowska 2018; Abramowicz 2017; Wolański et al. 2016, p. 66; Stanek 2016].

The author indicates that research on car communication enterprises usually includes all entities, regardless of the form of their ownership. However, to this day there still operate dozens of such state-owned enterprises. In addition, all research focus on various aspects of the functioning of these enterprises except for the strategic aspect. The enterprises create plans and other documents regarding further development, but there is a lack of using the appropriate methods of strategic analysis. So far the authors have analysed the macro-environment using various methods of strategic analysis. The article presents the next stage of their research on the microenvironment. It started with an analysis of the attractiveness of the sector of the researched enterprises using the Porter Five Forces method. The aim of the article is to assess the impact of recipients and suppliers on the state-owned car communication enterprises. Other factors used in this method will be considered in separate publications.

2. Literature review

The systemic approach in management sciences meant that more attention was paid to the organization's relations with its surroundings. The direct behaviour of competing companies on the market is not the only determinant of competition in the environment. Such a determinant is the total intensity of individual elements of the structure of this environment. The suppliers and customers present in it are often characterized by strong relationships with the organization. These relationships do not always have to be partner relationships. Economic practice often confirms these theoretical claims. Therefore, the power of suppliers and consumers is treated as one of the competition forces [Kraśiński 2014, p. 451; Krajewska, Łukasik 2010, p. 174].

The purpose of the enterprise environment research is to learn about processes and phenomena that are important for the creation and implementation of strategies.

On this basis, the assumptions of the strategy are adapted to changes taking place in the environment and this also includes suppliers and customers to create a more friendly relationship with it. Observation of the environment allows to observe the directions in which changes in particular areas follow. It also helps to predict the effects that the company can reach [Penc 2005].

Porter's Five Forces model is the first element of a multidimensional analysis of the sector. In this model, the power of the suppliers and customers is one of the five competitive forces. They affect the strategic position of the company on the market. In addition, they form the basis for determining the strengths and weaknesses of the organization [Porter 2010; Porter 2008, p. 27, 35; Urbanowska-Sojkin (ed.) 2008; Porter 1979, pp. 214-227].

The ability to influence the behaviour of other market participants and resistance to their impact is called bargaining power. This feature is characterized by all market participants [Kamiński 2006]. Therefore, the ability of suppliers to interact is strongly related to their relative strength [Gołębiowski 2001]. Suppliers are other entities whose services or offered goods are necessary for a company to run a business smoothly. Any disruptions in the cooperation of the company with its suppliers may be a threat to the conduct of its operations [Czubała et al. 2012]. The bargaining power of suppliers may depend on including following elements [Gierszewska, Romanowska 2013; Szałkowski, Bukowska 2008]:

- the degree of concentration of suppliers of materials, products and services,
- existing substitutes for offered products and services,
- market share and its monopolistic position,
- the necessity of a product or service for the buyer,
- participation of the supplier in creating the cost of customers,
- the possibility and amount of the cost of changing the supplier,
- vertical integration capabilities by suppliers,
- the dependence of the quality of the final product on the quality of the product purchased from the supplier.

The second impact on the enterprise in Porter's Five Forces are customers, also known as buyers, clients or shoppers. These are people and organizations that can demonstrate the demand for services and products offered by the company. The sale of a company depends on their decision regarding the purchase of a given service or product. If the company's product offer is not accepted by them, then the existence of such an organization on the market is at risk. Therefore the company, in accordance with the principles of marketing, should recognize their needs, preferences and proprietors. It is only on this basis that one should decide on the choice of target market segments and adapt marketing activities [Czubała et al. 2012].

The impact of customers is the result of a combination of supply and demand. In the case of exceeding the demand by supply, the so-called the customer's market, which can be characterized by the greater negotiating power of the buyer. However, the reverse relation between these participants is shaped by the producer's market. Then the impact force is greater on the producer's side [Łuczak 2003]. The impact of

buyers can be seen as the bargaining power of buyers with whom they trade [Inderst, Mazzarotto 2008].

The bargaining power of buyers depends on many elements. These can include [Gierszewska Romanowska 2013; Szałkowski, Bukowska 2008; Nieżurawski, Owczarczyk-Szpakowska 2005; Łuczak 2003; Gołębiowski 2001; Porter 1992]:

- the degree of concentration of customers,
- the product's characteristics and the degree of its standardization understood as the product differentiation,
- buyers' profits,
- purchase volume,
- low cost of switching supplier,
- the ability of the customer to independently create the service,
- having information about the market situation by the customers,
- substitution services.

The influences of customers and suppliers are undoubtedly important in the functioning of every enterprise as well as in the process of creating its competitive advantage. With a sufficiently large impact on the company, suppliers and customers can limit its profitability. The supplier achieves bargaining power for example when the company has a low chance to cover costs by increasing prices. In turn, the buyer achieves bargaining power when he/she can force the seller to lower their prices [Gołębiowski 2013, pp. 28-29; Wawiernia 2013, p. 344; Nieżurawski, Owczarczyk-Szpakowska 2005; Noll 2005, p. 589].

3. Research methodology

Previously the authors' research focused on the analysis of the macro-environment of PKS. It started with the specification that the surveyed companies constitute a strategic group and indicated the reasons for their poor situation [Budzik 2017a; 2017b, p. 53]. Next, using the economic sector profile method, the environment of the studied group of enterprises was negatively assessed [Budzik, Budzik 2018a, pp. 294-401]. The final element of the macro-environment analysis was the evaluation of its segments using the PEST method [Budzik 2018a, pp. 47-59; Budzik, Budzik 2018b, pp. 380-387; Budzik 2018b]. Consequently, the research presented in this article presents the results of the next research stage concerning these entities and starts with the micro-environment analysis. The first tool used was Porter's Five Forces model. The focus was on the customers and suppliers of the researched enterprises. Other factors used in this method will be considered in separate publications. The article opens a series of publications devoted to the in-depth strategic analysis of PKS.

The selection of the research sample was described in the earlier works by the authors [Budzik 2017a]. Non-random choice was used. The selection of the research group was deliberate and served the following criteria:

- activity consisting of bus transport,
 - ownership – only those enterprises that belong to the public sector have been taken into account and are in majority ownership of the State Treasury or local government units,
 - company name containing the PKS bus or its development,
 - functioning of the company in 2012-2018,
 - the amount of detailed information available and the opportunity to gather them.
- On this basis, companies forming a strategic group and at the same time being a research group were selected.

Three basic stages can be distinguished in the research procedure.

The first one includes the identification of the main customers and suppliers of the surveyed enterprises.

Among the suppliers, two groups were distinguished. The first one is the supplier of material products and services, which determine the activity of the surveyed enterprises to a large extent. The second is the supplier of ancillary services who directly affect the quality of the services offered by the surveyed enterprises.

For customers, this division was not used. In this case, the customers were defined individually for each activity.

The second stage is the analysis of the impact of suppliers and customers on the surveyed companies. The analysis was done for the main activities. The main activities were identified in the authors' previous studies [Budzik 2017a]. They are:

- transport of people,
- district vehicle inspection station and maintenance and repair services,
- lease of property,
- gas station,
- transport of goods.

The third stage is the assessment of the impact of suppliers and customers on the surveyed companies. Based on the presented literary studies and interviews with the management of enterprises, the main factors determining the impact of a given market participant were determined. In the case of suppliers, this included:

- the degree of concentration of suppliers,
- the dependence of the quality of the final product on the quality of the product bought from the supplier,
- supplier's monopolistic position,
- a large share of the supplier in creating the cost of customers,
- the possibility and amount of the cost of changing the supplier,
- the possibility of vertical integration by suppliers.

For customers the following factors were identified:

- concentration of buyers,
- purchase volume,
- information known to buyers,
- ability to create the service on one's own,

- substitution services,
- buyers' profits,
- product differentiation.

Subsequently, in the context of a given activity, each of these factors was rated on a scale from 1 to 5. The next step was to calculate the average impact of the customers of a given activity on the surveyed entities. On this basis, conclusions were drawn.

4. Research results

The research results were divided into two categories. The first one concerns the analysis of the impact of suppliers on the surveyed enterprises. The second concerns customers and their strength of influence. The Porter Five Forces tool was used in the research.

4.1. The strength of suppliers' influence

Analysing the scale of the impact of suppliers on the functioning of the surveyed group of enterprises, the suppliers were presented in two groups.

The first group are suppliers of tangible products and services that determine the activity of the surveyed enterprises to a large extent. The speed and quality of the products and services delivered affect the specificity and scope of the services of the examined entities. This group includes:

- offices and institutions issuing the required permits,
- fuel suppliers,
- service parts suppliers.

The second group of suppliers directly affects the quality of services offered by the surveyed enterprises. These are the providers of ancillary services, in particular:

- offices and institutions carrying out inspections in road transport,
- insurance companies,
- financial institutions,
- energy suppliers,
- providers of municipal services,
- IT and telematics service providers.

The specifics of the activity of the studied group of enterprises indicates that the performance of the basic activity of the transport of people by these entities requires appropriate licenses and permits. Similarly, the additional activity, for example the OSKP (District Vehicle Inspection Station), petrol stations and transport of goods, depends on the possession of the appropriate permits. Their absence significantly limits the scope of the services offered by the surveyed group of enterprises.

Transport is one of the most energy-intensive sectors of the economy. In transport much of the energy consumed is fuel. The performance of bus and freight transport

services involves high costs of vehicle operation. Hence, fuel suppliers directly affect the profitability of journeys. Fuel prices at the own stations of the subject enterprises mainly depend on the wholesale prices offered by suppliers. Additionally, fuel suppliers and the suppliers of service parts influence the operations of the examined group of companies. Their prices and availability affect the speed and efficiency of service activities. Furthermore, the quality of these parts in many cases affects the failure-free nature of vehicles and suppliers having the appropriate parts in storage can significantly reduce vehicle downtime due to a defect by reducing the repair time.

The influence of the suppliers also impacts the quality of services of the studied group of enterprises. These entities must meet the relevant standards and requirements in order to obtain positive assessments of the offices and institutions carrying out inspections, especially in road transport, as this translates directly to the safety of passengers and goods. The quality of fuels supplied, apart from the technical issues of engines affects the costs of vehicle operation, by the amount of fuel consumed.

The examined enterprises have permanent contracts only with some of the suppliers. Therefore the suppliers are often providers of services on local markets. The choice of the appropriate supplier or its change depends on such factors as the availability and price of the product or service, the method of delivery of the product or the location of receiving it, place of service and its duration, and the individual preferences of the customer. Sometimes the examined enterprises acquire customers

Table 1. Identified determinants of the impact of suppliers on a test group of enterprises

No	Examined factor	Identification of impact (1 – weak, 5 – strong)				
		Transport of people	OSKP and repair services	Rent of property	Petrol station	Carriage of goods
1	Degree of concentration of suppliers	3	3	2	4	2
2	The dependence of the quality of the final product on the quality of the product purchased from the supplier	5	4	2	4	1
3	Supplier's monopolistic position	5	3	2	3	3
4	Large share of the supplier in creating the cost of customers	5	3	1	5	5
5	The possibility and amount of the cost of changing the supplier	4	3	2	2	1
6	The possibility of vertical integration by suppliers	2	2	1	3	1
The average impact force on the ex-aminated entities		4,0	3,0	1,7	3,5	2,2

Source: own study based on [Gierszewska, Romanowska 2013, pp. 81-82].

by submitting appropriate tenders. These are mainly companies with their own gas stations and large technical facilities. In the case of offices and institutions issuing the required permits and carrying out inspections in road transport, it is not possible to change the supplier.

In order to identify the impact of suppliers on the group of examined enterprises, the factors determining it (Table 1) were summarized.

4.2. The strength of customers' influence

The customers of the bus transport services provided by the examined entities are every person, company or organization expressing the demand for these services. The basic category of customers for this activity is the population living in non-urban areas served by the surveyed group of enterprises. The largest group of customers are school-age youth and other people entitled to concessionary journeys. The volume of this group in recent years has been steadily decreasing and one of its reasons can be demographic decline.

Due to the fact that the largest percentage of passenger transport is school transport, the characteristic feature of passenger road transport is its seasonality. The sale of concessionary tickets during holiday periods drops sharply and consequently also the extra fares. However, the popularity of fast-service tickets is increasing. Unfortunately, not all examined companies run this kind of bus route and they record the largest losses during this period. Bus routes are often reduced by introducing a holiday timetable. The analysis of financial statements showed that the examined enterprises recorded the largest revenue from the sales of bus transport services in the fourth quarter when the meteorological conditions change from summer to winter. On the other hand, the smallest takings are recorded in the third quarter, when the weather is conducive to pedestrian travel or, for example, cycling trips.

An indication of the bargaining power of consumers is also the pressure of passengers on the prices of transport services and at the same time the high requirements related to the quality of transport services. Currently, passengers have higher requirements than a few years ago. People who have an alternative to the bus pay attention primarily to the price of the ticket. Its level is a factor influencing the choice of a means of transport. Comfort and quality of the services provided are further arguments that significantly influence the choice of means of transport. Passengers now prefer buses with air conditioning, while non-operating heating in winter can become a decisive criterion when choosing a mode of transport. Punctuality of routes and failure-free vehicles are factors that cannot always be predicted. Most passengers do not pay attention to them, only until the bus is late or breaks down on the road. For those travelling to school or work, the price of the ticket and the comfort of the ride become insignificant and the most important aspect becomes the fastest possible way to reach the destination. Safety has a minimal impact on the attractiveness of a particular means of transport. Passengers do not pay

attention to safety-related issues, which can often be heard when the media informs about yet another failure to comply with the regulations, e.g. regarding the maximum number of passengers carried by a given vehicle. Security is not dependent on the passengers themselves, so some carriers do not care about it.

The examined enterprises also provide rental services on request and tourist services as part of bus transport. Their customers are usually school institutions, like primary schools, middle schools and high schools. In this case, PKS are distinguished by their extensive experience and low prices. The bargaining power of this type of customers is manifested by the emphasis on the technical condition of vehicles and the comfort of travel while maintaining low prices.

In addition to the basic activity, the examined group of enterprises also provides other, additional services, mostly connected to transport. The customers of the services of the regional vehicle control stations (OSKP), servicing and repair services are users of motor vehicles. Most often they are transport companies or other companies with trucks or buses. An expression of the bargaining power of these customers is the pressure on the speed and efficiency of service activities while maintaining low prices.

In the case of leasing property services, the customers are business entities operating in various industries that require for own use business premises, parking places, etc. The most important factors of bargaining power affecting the preferences of these customers are the costs and area of rent and the location of the property. The examined enterprises as part of their possibilities adapt their product offer to the clients' requirements. The only factor that cannot be influenced is the location of the rented properties, so adjusting to the market is always correlated with the location factor.

Table 2. Assessment of factors determining the impact of recipients on the surveyed group of enterprises

No	Examined factors	Identification of impact (1 – weak, 5 – strong)				
		Transport of people	OSKP and repair services	Rent of property	Petrol station	Carriage of goods
1	Concentration of buyers	2	4	4	4	1
2	The volume of purchases	1	2	3	2	3
3	Information known to buyers	2	3	3	1	3
4	The ability to create the service oneself	4	2	2	2	3
5	Substitution services	5	2	2	1	3
6	Buyers' profits	2	2	4	3	4
7	Product differentiation	4	3	5	3	3
The average impact force on the surveyed entities		2,9	2,6	3,3	2,3	2,9

Source: own study based on: [Gierszewska, Romanowska 2013, pp. 81-82; Gołębiowski 2001, p. 132; Szałkowski, Bukowska 2008, p. 43; Nieżurawski, Owczarczyk-Szpakowska 2005, p.76; Porter 1992, pp. 23-46].

The customers of the service stations are mainly individual car users and companies. These customers, when choosing the service station, are motivated mainly by the location of the station itself. It is rare for a customer to go to a selected station and change the route significantly. While such situations may occur in the case of passenger cars, truck drivers often have no way of doing so. This is caused by the size of the truck, which is more difficult to manoeuvre than by a passenger car. In addition, these vehicles have many mandates and prohibitions related primarily to their weight. The second most important factor determining the choice of a given gas station is fuel prices.

Carriage of goods are services offered only by two companies from the group of fourteen respondents. This activity is aimed at servicing international transport, mainly to EU countries, but also domestic transport services are provided. Customers of these services are looking for solutions that will provide them with fast, efficient and safe transport at a relatively low price.

The identification of the impact of recipients on the examined group of enterprises was made by comparing the factors determining this strength for the customers of the relevant services (Table 2).

5. Discussion

The regional bus transport market in which the examined group of enterprises operates, is particularly connected with the suppliers' market. Their impact largely determines the scope and specificity of the activities related to the transport of services. In this case, three factors were assessed as those most affecting the examined enterprises. These are: the dependence of the quality of the final product on the quality of the product purchased from the supplier, the monopolistic position of the supplier and the large share of the supplier in creating the cost of customers. The OSKP and service-repair services as well as service stations are characterized by the weaker but equally important strength of supplier interaction. The dependence of the quality of the final product on the quality of the product purchased from the supplier is the factor that has the most impact on the strength of the OSC suppliers and repair services. On the other hand, for a petrol station and transport of goods, this is a large share of the supplier in creating the costs of customers.

The least important factor influencing the strength of suppliers' impact, apart from the petrol station is the possibility of vertical integration by suppliers. For the petrol station, it is the option and amount of the cost of changing the supplier.

Considering the overall impact of suppliers on the examined enterprises, it is stated that this group is characterized by the strong bargaining power of suppliers.

The impact of the customers of particular activities on the functioning of the examined enterprises is not strong, however, it should be taken into account when developing the strategy for the examined group of enterprises. The largest group of

customers of the examined enterprises, concerning passenger transport, can be characterized by an average significant impact force. In this case, the most influential factor for the examined entities are replacement services, and the least influential factor the volume of purchases. The least significant impact among the customers of all services of the examined group of enterprises concerns the operation of the fuel station, where the factor that most strongly affects is the concentration of buyers. A significant force of influence is related to the lease of assets, OSKP and repair services as well as transport of goods, where the factors that significantly affect each other are product diversification, concentration of buyers and buyers' profits. Based on the survey, the authors concluded that the customers affect the examined companies to a moderate degree, and their strength is comparable for all analyzed services.

The goal of the article has been achieved. On the basis of the conducted research, the assessment of the impact of suppliers and receivers of PKS was made. In addition, the factors that determine these forces and the size of each of them were defined.

6. Conclusions

On the basis of the partial analysis of Porter's Five Forces, it is stated that the surveyed enterprises have a stronger influence on the suppliers than on the customers.

The functioning of the surveyed group of enterprises is strongly dependent on suppliers. The specificity of the sector in which they operate requires the possession of the appropriate permits and certificates, without which they would not be able to conduct their basic activity, which is the transport of people, similarly to additional services, including OSKP and petrol stations.

The customers of the examined group of enterprises affect its functioning to a small extent, and individual services are characterized by the similar strength of impact of their customers. However, this strength is so great that it should be taken into account when creating the strategy.

The conducted research complements the research gap consisting in the lack of in-depth research in the field of strategic analysis regarding PKS. However, they are only part of a comprehensive strategic analysis of these entities. On this basis, it is not yet possible to build a strategy aimed at achieving a competitive advantage. However, they give an idea of the extent to which suppliers and customers influence the functioning of the examined enterprises. At the same time, it is noteworthy that the presented research includes in general many enterprises. By analyzing the participants of the micro-environment, especially the customers, for each enterprise individually, the results may slightly differ from those presented in the article. Therefore each company should treat these research results as a model and at the same time should adapt it to its particular conditions.

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