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Exploring the Implications of Low-Cost Leadership and Differentiation Strategies in the East African Community Market: A Perspective of Local Firms

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Preface

East Africa Research Papers in Business, Entrepreneurship and Management is a series linked to the collaborative PhD program in Economics and Management among East Africa national universities. The program was initiated and is coordinated by the Jönköping International Business School (JIBS) at Jönköping University, Sweden, with the objective of increasing local capacity in teaching, supervision, research and management of PhD programs at the participating universities. The program is financed by the Swedish International Development Cooperation Agency (SIDA).

East Africa Research Papers is intended to serve as an outlet for publishing theoretical, methodological and applied research covering various aspects of the East African economies, especially those related to regional economic integration, national and regional economic development and openness, movement of goods, capital and labor, as well as studies on industry, agriculture, services sector and governance and institutions. In particular, submission of studies analyzing state-of-the-art research in areas of labor, technology, education, health, well-being, transport, energy, resources extraction, population and its movements, tourism, as well as development infrastructure and related issues and discussion of their implications and possible alternative policies are welcome.

The objective is to increase research capacity and quality, to promote research and collaboration in research, to share gained insights into important policy issues and to acquire a balanced viewpoint of business, entrepreneurship and management policymaking which enables us to identify the economic problems accurately and to come up with optimal and effective guidelines for decision makers. Another important aim of the series is to facilitate communication with development cooperation agencies, external research institutes, individual researchers and policymakers in the East Africa region.

Research disseminated through this series may include views on economic policy and development, but the series will not take any institutional policy positions. Thus, any opinions expressed in this series will be those of the author(s) and not necessarily the Research Papers Series.

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Abstract

Over the past few decades, East African countries have made tremendous economic, social and political progress and are seeking to consolidate this growth with the formation of the East African Community. The Global Entrepreneurship Summit held in Kenya's capital Nairobi in July 2015 highlighted the competitiveness of local firms in the region as having the potential to contribute to high-value added activities through innovation and entrepreneurship. Nonetheless, there are general concerns as to whether local firms can maintain their competitive advantages in the new environment of economic integration especially with the increasing entry of more resource endowed players from abroad. This conceptual paper explores the capacity of local firms to maintain their competitive edge by evolving into low-cost producers and/or differentiators. Specifically, the paper presents arguments in support of the differentiation strategy being followed by fledgling manufacturing local firms. While recognizing the limitations for local firms along this path, the paper identifies areas from previous research which address the question of upgrading from big emerging markets such as China, India, Argentina and Brazil and suggests areas that can guide future research aimed at helping local firms to be successful differentiators.

Keywords: Economic integration, firm competitiveness, low-cost competencies, differentiation competencies, East African Community.

JEL Classification Codes: D24; J31; N37;

1. Introduction

As market opportunities around the world become thin, the world is looking at Africa for future growth. This is exemplified by the increasing high-level political visits from the global South and North aimed at cultivating new forms of relations on the continent; the increasing influx of multinational corporations (MNCs); and the growing positive international media coverage of the continent (Roxburgh et al., 2010; UBS, 2012). For many observers, Africa is the world's last frontier market and it is moving from the periphery to the center stage of global business issues (Global Entrepreneurship Summit, 2015; Roxburgh et al., 2010).

With this new reality, the six East African countries are seeking to consolidate their positions on the continent with the formation of East African Community (Kamala, 2006; Kiggundu and Walter, 2015). The East African Community is an economic bloc comprising of Kenya, Uganda, Burundi, Tanzania and Rwanda (Ogola et al., 2015), which was most recently joined by South Sudan in March 2016. This formation is a market of over 162 million people including South Sudan (Daily Nation, 2016), and with fast growing middle incomes. The market also boasts of a collective gross domestic product (GDP) of over US$ 110.3 billion as per 2014 estimates[1] (East African Community Secretariat, 2014).

Also typical about the East African Community market are increasing attempts by member countries, with the exception of Burundi and South Sudan, to build a strong competitive business environment based on meaningful political, market, legal and institutional reforms (Ogola et al., 2015). Under the auspices of this rebranding, it therefore does not come as a surprise that over the recent past the East African region has witnessed remarkable growth in local entrepreneurship and foreign firm activities (Global Entrepreneurship Summit, 2015; Ogola et al., 2015; Sutton et al., 2015). In fact, with the hosting of the 2015 Global Entrepreneurship Summit, one can conjecture that the world is recognizing the innovativeness and entrepreneurial prospects of local firms in the region more than it has ever done before. But as the market potential of regionalization and associated advantages attracts foreign competitors, it is not known how domestic firms in the East African market can strategically position themselves to survive and achieve growth.

There is a dearth of systematic research efforts to understand how recent changes in the region which are coming about with the East Africa Community are likely to affect the competitiveness of local firms (Hategeka, 2011; Kiggundu and Walter, 2015). Of critical concern to the economic future of regionalization efforts is how fledgling domestic firms in the manufacturing sector can survive emerging competition from regionalization (Kiggundu and Walter, 2015). This paper seeks to arouse interest in a firm-level debate on how strategic choices between low-cost leadership and differentiation can affect local firms in the manufacturing sector. Specifically, the paper outlines how an attempt to build differentiation competencies is imperative for local firms to enjoy the benefits of the

[1] These estimates exclude South Sudan.

integration more. This is a critical area of inquiry given that private sector growth is central to the current process towards regional integration (Kiggundu and Walter, 2015).

2. Literature review

2.1 Overview of the East African Community's formation

The East African Community market is a group of six countries -- Uganda, Kenya, Tanzania, Rwanda, Burundi and South Sudan. This integration is built on a long history of cooperation between Uganda, Kenya and Tanzania which dates back to 1917 (East African Community Secretariat, 2006; Kamala, 2006; Ogola et al., 2015). In 1917, Uganda and Kenya established a customs union, representing the first formal economic ties in the region, and in 1927 Tanzania joined the union (East African Community Secretariat, 2006). To upgrade their economic ties, the three countries agreed to and established the East African High Commission from 1947 to 1961, and later the East African Common Services Organization from 1961 to 1967 (East African Community Secretariat, 2006; Ogola et al., 2015). The climax of the cooperation was reached in 1967 with the formation of the first East African Community. During this stage, however, there was increasing divergence among member states from the key principles that had made the previous series of cooperation successful. Concomitantly, the cooperation suffered a setback with its collapse in 1977 (Ogola et al., 2015; Sutton et al., 2015).

A number of interesting events underlie the period between 1977 and the current East African Community. More notable among these is the disbarment agreement of 1984 between the three countries that comprised the first East African Community: Uganda, Kenya and Tanzania (East African Community Secretariat, 2006). Within this negotiation, these three East African countries agreed to disband assets and division of liabilities, but continued exploring opportunities for future economic cooperation (East African Community Secretariat, 2006). This was followed with the signing of an agreement for establishing the Permanent Tripartite Commission in 1993 (East African Community Secretariat, 2006). This and several other initiatives along the same path gave birth to a renewed spirit for stronger integration among these countries (East African Community Secretariat, 2006). The key outcome was the signing of the East African Community treaty in 1999 and the re-establishment of the East African Community in 2000. So far, the East African Community has registered high membership with the accession of Rwanda and Burundi in 2007 and more recently, South Sudan in March 2016. Though unresolved issues exist on the pace of moving to higher levels of integration, the East African Community member states (with the exception of Tanzania) appear to support a fast tracked process (Ogola et al., 2015).

Member states ratified a customs union in 2005, a common market in 2010 and a monetary union is scheduled for 2017 (Ogola et al., 2015). Drawing on existing literature and the experience of other regional blocs, it is widely anticipated that the current regional integration efforts in the East African region are likely to give member countries a high level of competitiveness and strength to integrate with the global market via their strategy of private-sector led growth (Kiggundu and Walter, 2015; Ogola et al., 2015).

2.2 Competitiveness of East African Community firms

The main area of competition for East African Community firms has conventionally been in the agricultural sector (Adar, 2011; Ogola et al., 2015). However, member states are increasingly recognizing the need of strengthening manufacturing and services sectors (Hategeka, 2011; Ogola et al., 2015). The current debate in the regional development agenda is on the question of how to build competitive industrial and services sectors. These sectors continue to contribute a small percentage to regional GDP (Ogola et al., 2015).

However, there are indications which suggest that the value and competitiveness of these sectors is growing (Ogola et al., 2015). For instance, there is mention of a number of innovations in the manufacturing and services sectors involving local firms, which offers credence to the progress in these sectors (Littlefield, 2015). Notwithstanding this progress, local firms still suffer from a number of constraints that affect their competitiveness in the face of competition from foreign companies (Hategeka, 2011). Most notable of these is the fact that local firms have evolved in an environment of a weak technological base and institutional support in the region. In addition, local firms in the region have majorly focused on domestic operations and therefore lack international experience. Extant studies have also identified lack of capital and unsupportive legal and regulatory frameworks in describing the low competitiveness of local firms in the East African region (Ogola et al., 2015).

The formation of the East African Community is expected to reverse this trend (Lalani, 2015; Musani, 2015; Shah, 2015). For instance, the East African Community member states have now embarked on a number of programs aimed at enhancing the competitiveness of local firms, including but not limited to, infrastructure development, technological enhancement, removing trade barriers and strengthening the financial sector (Ogola et al., 2015; Sutton et al., 2015). Nonetheless, under this arrangement, governments in the region are reducing their protection of local firms from market forces as these local firms have to learn to compete on the basis of their efficient operations and business capabilities.

2.3 Conceptual background and propositions

The formation of the East African Community is creating a new form of competitive dynamism for local firms in the region (Hategeka, 2011). Competition for these firms is not necessarily new. In the 1990s, East African Community member states, individually and with support from IMF and the World Bank, agreed to shift their ideology towards a free market economy (East African Community Secretariat, 2006). This model specifically emphasized an export growth strategy, privatization, the market and a trade liberalization agenda. Since then, the competitive environment for East African Community firms has been characterized by an influx of foreign and local competitors and proliferation of imported products (Hategeka, 2011; Ogola et al., 2015). The formation of the East African

Community is expanding the scope of this competition through the removal of barriers that gave advantage to local firms (Lalani, 2015; Musani, 2015; Shah, 2015).

The restoration of the East African Community is also happening at a time when opportunities for market growth around the world are becoming thin (Frameworks, 2016; Roxburgh et al., 2010; UBS, 2012). In this environment the widening market in the region is attracting world class competitors more than ever before (Hategeka, 2011). These developments make it imperative to address the question of how firms should compete in the new competitive environment that is emerging with the formation of the East African Community. In extant literature, while addressing the competitive challenges of emerging markets, scholars also discuss the role of differentiation and low-cost competencies (Elango and Pattnaik, 2007; Kotabe et al., 2000; Malik, 2008; Pett and Wolff, 2003). These studies give insights into how local firms can utilize differentiation and low-cost competencies in these contexts. The key argument highlighted in these studies is that firms need to tailor their strategies appropriately to the changing business environment in order to survive.

2.4 Prospects for local firms competing on the basis of low-cost strategies

Low-cost strategies provide advantages via scale, efficiency and access to low-cost inputs (Dess and Davis, 1984). Firms with these competencies are capable of gaining a competitive advantage by delivering the same products as the competition at prices below the industry average to achieve a larger market share, or that which match the industry average to gain higher profits (Gao et al., 2010; Kotabe et al., 2000; Pett and Wolff, 2003). In extant literature, access to low-cost resources has been the most discussed advantage supporting firms' low-cost strategy in developing countries (Elango and Pattnaik, 2007; Kotabe et al., 2000). Local firms in the East African region are not exceptions. Prior to the formation of the East African Community they had specifically delivered their advantage almost entirely on their country-based low-cost resource advantages and associated benefits (Hategeka, 2011; Ogola et al., 2015). These included, but were not limited to, a comparative advantages in understanding local labor market dynamics; unique access to other local resources such as land; and strong relations with their local governments that have continuously offered them preferential resource access (Hategeka, 2011; Musani, 2015; Shah, 2015).

The formation of the East African Community is increasingly eroding these advantages via the creation of a unified market and giving more strength to the needs of low-cost firms to develop efficiency and scale (Hategeka, 2011; Shah, 2015). However, given their small size these are areas which local firms cannot easily address in the face of new competitors entering the market. Moreover, the East African countries are uniting at a time when MNCs have learned about these issues and a wide knowledge base exists to guide their practices on these competitive constraints. MNCs can access resources from around the world more cheaply through outsourcing (Kotabe et al., 2000). These factors combined with their size disadvantages are expected to make it difficult for local firms within the East African Community to compete on the basis of low-cost advantages to fully defend their domestic turfs. Based on these arguments we can conjecture that in the short-run low-cost firms in the region can still register some success, but they will have to compete with a disadvantage in the long-run.

2.5 Prospects for local firms competing on the basis of differentiation strategies

The previous section discussed the viability of a low-cost strategy to deliver advantages for local firms in the evolving environment in the East African Community. This section extends the discussion to the role of differentiation strategies in determining local firms' success in the East African Community. The differentiation competencies are based on building unique assets and image for a firm's offerings (Dess and Davis, 1984; Elango and Pattnaik, 2007; Kotabe et al., 2000; Pett and Wolff, 2003). These can help firms survive competition by appearing different and thereafter they can charge a premium price. Extant literature provides a contrast of differentiation competencies in developed-country and emerging-market firms.

Differentiation strategies for developed-country firms are based on radical innovations built on superior technology and designs (Corredoira and McDermott, 2014; Malik, 2008; McDermott and Corredoira, 2010). This is not the case in the context of East African firms and also in other emerging-market contexts (Corredoira and McDermott, 2014; Elango and Pattnaik, 2007; Malik, 2008). Within a context like the East African Community, local firms are observed to follow an approach identified in earlier cited works for addressing the competitive strategies of developing-country firms. This involves adapting imported technology from developed-countries to local contexts. These advantages may not support the success of local firms seeking head-to-head competition with superior firms, especially MNCs, entering the market. Nonetheless, there can be a platform for firms with these competencies in terms of securing partnerships with their foreign firm competitors. Further, more than low-cost competitors that target broad markets, local differentiators can more easily identify and exploit niche markets that are outside the reach of foreign firms. Based on this discussion, we propose that local firms employing a differentiation strategy are more likely to achieve higher success in the increasingly competitive East African Community.

These propositions were corroborated with an exploratory survey of 31 manufacturing SME exporters purposely selected from Uganda, one of the key member states of the East African Community. The respondents in this survey were strictly top executives in these establishments. The SMEs surveyed were selected from two of the major industrial parks located in capital Kampala: Nakawa and Ntinda. Fifteen respondents were obtained from Nakawa while 16 respondents came from Ntinda using a purposive sampling method. These constituted about 30 and 70 per cent of all exporters in these two industrial regions respectively. Most of the firms in the sample were formed during the economic restructuring of the country. In the 1990s, the government implemented structural economic restructuring programs (SAPs) whose tenets included trade liberalization and privatization.

These economic reforms led the country towards a path of free-market ideologies. Intuitively, therefore, the SMEs in the survey operate amidst competition and employ various strategies to survive competition both from local and foreign rivals. The average exporting years of the SMEs in the survey was seven years. With such international exposure, the formation of the East African Community is likely to be of interest to these firms. Thus, notwithstanding the small sample size, we can still get some insights from it to corroborate conceptual rationalizations regarding the discussion on how local firms' strategies are associated with managerial perceptions of opportunities for export growth and performance within the emerging East African Community market. Drawing on descriptive statistics, when asked the extent to which the formation of the East Africa Community will affect their growth and performance, SMEs competing on the basis of low-cost generally demonstrated more worry and skepticism about the East African Community in terms of enhancing their sales and survival. On the other hand, differentiators viewed the formation of the East African Community as being vital to their growth and performance.

3. Discussion and conclusion

This paper contributes to the current debate on local firms' survival with the formation of the East African Community. The discussion addresses the nascent manufacturing sector in the region where local firms are now faced with more experienced competitors from abroad. Recent discussions have looked at macroeconomic factors and argued for the benefits of regional integration including productivity, growth and welfare development of member states. While the key part of this debate recognizes the constraining role of competition as the integration takes shape, it is not clear from these macro insights how local firms can position themselves in the manufacturing sector to deal with the new challenge of competition coming from international competitors. In this market local firms have always competed with less innovative products and produced mature products. But with the formation of the East African Community, they now face an increasing number of more sophisticated competitors who are introducing cheap and high quality innovative products in the market.

The core argument in this paper is that executives of local firms can more easily improve their chances of surviving competition in the current East African Community market by taking the path of differentiation as opposed to the path of low-cost leadership. Differentiation advantages arise from firms' commitment to be innovative and creating products that the market considers unique. Local firms in the manufacturing sector are not expected to build their advantage by engaging in radical innovations associated with high investments in R&D. Local firms may not particularly be successful along this path, but they can benefit from incremental innovation efforts to build necessary differentiation competencies to compete favorably. Competing on the basis of pioneering innovations requires superior firm-level resources, a strong institutional and market regulatory framework, resource-rich institutions and/or universities engaged in ground breaking research (Corredoira and McDermott, 2014; Elango and Pattnaik, 2007; Malik and

Aggarwal, 2012; McDermott and Corredoira, 2010). These are factors which are not available for local firms in the East African region.

While this paper did not focus on how firms can build competencies for differentiation through innovation, there is an opportunity to draw on previous work on upgrading which focused on firms in big emerging markets such as China, Brazil and India to guide strategic action in the region. For instance, a large body of research has found support for a higher competitive position for emerging-market firms in those markets which invest in building their innovative capacities through reverse engineering; adapting technologies, products and processes from developed countries to local contexts; and being committed to adopting flexible manufacturing processes such as lean production and total quality management (Corredoira and McDermott, 2014; Malik and Kotabe, 2009; McDermott and Corredoira, 2010).

More recent studies have started demonstrating how seemingly weak institutions such as technical institutes and organizations such as business associations can help firms in emerging markets to be innovative by helping them acquire diverse experiential knowledge (Malik, 2008; McDermott and Corredoira, 2010). These are interesting observations that future research can investigate to deepen our understanding of how local firms in the East African region can utilize similar avenues to overcome the challenges that they face in becoming successful differentiators. With these insights, this conceptual paper not only opens a discussion on how a choice between low-cost leadership and differentiation strategy can affect the competitiveness of local manufacturing firms in the East African Community market, but also offers avenues for future research addressing the aspect of how these firms can be supported so that they become differentiators.

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