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An Exploration Into The Relationship Between Brand And Industry Evolution

Submitted for The Degree of PhD

2015

Helen J. Marks

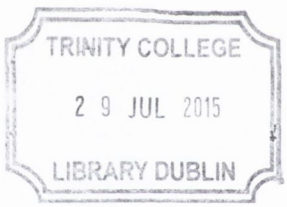
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SUMMARY

There is still much to discover about the evolution of whole industries, their boundaries and the influence of the final consumer on the products and services industries create. Brands have become integral to the contemporary customer decision-making process yet despite suggestions that they influence industry level change there is a paucity of empirical research to support or explain this hypothesis. This was the motivation for the study. Through analysing the agency of brand over extended periods of time, irrespective of the material assets they complement, an opportunity existed to build a conceptual basis to explicate how brands influence change and justify brand's centrality to business strategy.

This study explores the role of brand in the evolution of the Irish wholesale grocery and telecommunications industries from before the emergence of active branding within each industry. It employs a comparative longitudinal case study method based on the contextualist methodology developed at the Warwick Centre for Industrial and Corporate Change which allows for a grounded approach to analysis, cycles of inductive and deductive reasoning and the investigation of long-term multi-level change. Data were collected from interviews, documents, archives and artifacts while comparison between two independent cases reduces case bias and improves generalizability. The multi-modal design utilises five organization theories and the application of a coevolutionary framework across multiple levels of analysis.

This thesis makes contributions at the conceptual, empirical and practical levels. There is disagreement in the literatures as to both the elemental nature of brand and the definition of industry boundaries. This study redefines brand as a social technology and identifies four industry boundaries separating shared conceptions of cognitive and economic factors from their environment. Industries are in a constant state of change driven by exogenous and endogenous forces. Brands mediate the disequilibrium this causes between two inter-related systems, the rational world of production and the emotional world of consumption by creating and exploiting customer dependencies that form a relational base for seven complementary brand processes. These influence firm level survival and growth and the scope, permeability and tangibility of industry boundaries and consequentially structural change.

Brands influence industry evolution through ongoing cycles of stretching industry boundaries through innovation and efficiencies and using power derived from customer dependencies to push brands into adjacent market spaces and industries. These dependencies arise when brands give products or services selective advantage in the consumption environment and are the essence of brand equity. It is this brand equity that causes retention of brand related variations in the production environment and shifts in the balance of power in the industry value chain creating architectural advantage and structural change. As a technology brands respond to environmental

change by evolving to improve their environmental fit thereby explaining the longevity of individual brands, brand's conceptual development and why branding is a dual operational and dynamic capability.

The study makes empirical contributions by extending understanding of the evolution of two service industries and adding to the limited knowledge of brand in wholesale industries. It makes a contribution to practice by conceptualising brand as a social technology and highlighting how brands contribute to the strategic management of the firm beyond roles traditionally attributed to marketing, communications and consumer behaviour. In this way the brand management narrative is reframed into one of corporate and business level strategy.

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ABBREVIATIONS AND ACRONYMS

ADM	Allied Dublin Merchants Ltd
AWL	Amalgamated Wholesalers Ltd
AND	Associated National Distributors Ltd
ARPU	Average Revenue Per User
bn	Billion
BT	British Telecom
BWG	Brooks Watson Group
B2B	Business to Business
B2C	Business to Consumer
CAQDAS	Computer-Assisted Qualitative Data Analysis Software
CCSC	Centre for Corporate Strategy and Change
CPW	Carphone Warehouse
CPS	Carrier Pre-Selection
CSO	Central Statistics Office
CEO	Chief Executive Officer
ComReg	Commission for Communications Regulation
CSR	Corporate Social Responsibility
CPE	Customer Premises Equipment
CRM	Customer Relationship Management
EDL	Efficient Distribution Ltd
e.g.	For example
ESOP	Employee Share Ownership Plan
FTC	Fair Trade Commission
FMCG	Fast Moving Consumer Goods
FFF	Five Forces Framework
FRIACO	Flat Rate Internet Access Call Origination
FMNP	Full Mobile Number Portability
GSM	Global System for Mobile communications
GOQ	Guarantor of Quality
HR	Human Resources
INM	Independent News and Media
IT	Information technology
IO/E	Industrial Organization Economics
IP	Internet Protocol
ISP	Internet Service Provider
IOL	Ireland on Line
IADT	Irish Association of Distributive Trades
IBEC	Irish Business and Employers' Confederation
IMD	Irish Modern Distributors
IWGA	Irish Wholesale Grocers' Association
KPI	Key performance indicators
LTP	Let's Talk Phones
MMDS	Multi-Channel Microwave Distribution System
MMS	Mace Marketing Services
MBO	Management Buy Out
Marcoms	Marketing communications
MNC	Merchants National Co-operative Ltd
MNCs	Multi-National Corporations
MNO	Mobile Network Operator
MSCD	Supervalu Centra Distribution
MVNO	Mobile Virtual Network Operator
MUM	Munster United Merchants
NWGA	National Wholesale Grocers' Association
NIT	New Institutional Theory
NGB	Next Generation Broadband

NI	Northern Ireland
ODTR	Office of the Director of Telecommunication Regulation
OAO	Other Authorised Operators
OTT	Over the Top
P2P	Person to Person
PANS	Pretty Awesome New Services
PE	Population Ecology
P&T	Posts and Telegraphs
PLOF	Price list order form
POTS	Plain Old Telephone Services
PR	Public Relations
QSR	Quick service restaurant
RTG	Ready to Go
ROI	Republic of Ireland
RPM	Resale Price Maintenance
RPC	Restrictive Practices Commission
RGDATA	Retail Grocery, Dairy and Allied Trades' Association
RBT	Resource Based Theory
RBV	Resource Based View
RDT	Resource Dependence Theory
SOV	Share of voice
SMS	Short Message Service
SMP	Significant Market Power
SME	Small and Medium Enterprises
SKU	Stock Keeping Units
SIM	Subscriber Identity Module
TCE	Transaction Cost Economics
i.e.	That is
TV	Television
Telco	Telephone or telecommunications Company
Telecoms	Telecommunications
TSN	Tobacconist Stationer Newsagent
USP	Universal Service Provider
VRIN	Valuable, Rare, Inimitable and Non-substitutable
VAS	Value Added Services
VPN	Virtual Private Network
VoIP	Voice over Internet Protocol
VGR	Voluntary Group Retailer
WAP	Wireless Application Protocol
WiMAX	Worldwide Interoperability for Microwave Access

CHAPTER 1 INTRODUCTION TO THE STUDY

1.1 INTRODUCTION

Brands permeate modern economies, their influence extending beyond their genesis in consumer products to a plethora of forms. Yet there is much to be discovered about the nature and role of brands. Conducted from a strategic management perspective the purpose of this thesis is to explore how brands and their management influence industry evolution. This short introductory chapter sets the stage for the study. It presents the motivators and goals of the research, the research rationale and questions and the contribution that the answers to these questions can make to knowledge and practice. It concludes by outlining the approach to and structure of this thesis.

1.2 MOTIVATION FOR THE RESEARCH

Personal goals, including curiosity in a phenomenon motivate research and influence its progress whether this is explicitly acknowledged or not (Maxwell, 2009). Furthermore, research begins and ends with ideas (Spender, 1989). Therefore it is important to express my motivations and ideas from the start. As a director and senior manager responsible for brand in a number of industries I became interested in understanding how brands help firms achieve long-term success and influence industry structure. This interest was heightened by an escalating interest in the topic of brand[1] and rhetoric from brand experts inferring that brands were the key to competitive advantage and 'too important to be left to marketing'[2]. This contrasted with my observation that brands were not routinely regarded as a senior management concern, with brand strategy and management often the responsibility of relatively junior members of organizations. As a practitioner I had a thesis that brands do play an important role in the evolution of industries and that by understanding this role the brand debate could be reframed as one of business strategy.

Business historian da Silva Lopes observes that *" [B]rands are the most important determinant in the growth of firms. Brands explain to a considerable extent the evolution of industry structures"* (2007:3). Some brand scholars (e.g. Kornberger, 2010; Moon, 2010) infer that brands drive industry evolution. However, neither they nor industry evolution scholars adequately explain the mechanism or underlying theories of brand's influence on this process. In recent years management scholars have suggested brands are important to the study of firms from organizational and strategic perspectives (e.g. Clegg, Kornberger, & Pitsis, 2011; Hatch & Schultz, 2001, 2008) but the strategy literature offers little theoretical explanation of the mechanisms by which brands contribute to value creation or value capture. These gaps in knowledge are

[1] In July 2014 there were over 2.73 million hits on the word 'brand' on Google Scholar and 204,000 when the word 'branding' is added to the search. This compares with under 14,000 for 'industry evolution'.
[2] The original quote, attributed to David Packard, is that 'marketing is too important to be left to the marketing department'. In recent years the word 'brand' has increasingly been substituted for marketing.

compounded by inconsistencies in the definition of brand. My premise was that the process by which brands influence change must be explained through understanding brand's elemental nature.

This research is supported by a scholarship from the Musgrave Group Plc with a request that a wholesale industry be included in the empirical research. Industry effects are particularly important in wholesaling accounting for over 40% of variance in profitability (McGahan & Porter, 1997), yet the evolution of wholesaling and other distributive and service industries is under-researched. These gaps in knowledge plus the attraction of participating in the research cluster exploring long-term industry change in Trinity College Dublin were personal motives driving this research and form part of the rationale for this study.

1.3 RESEARCH RATIONALE

The growth of modern economies is characterized by the emergence, development and decline of industries. Firms enter an industry, some exit, some grow and others decline. The evolution of industries is characterized by intense change, sometimes over lengthy periods of time. Yet there are significant empirical and theoretical gaps in understanding industry evolution including research in the structure of whole industries (Malerba & Orsenigo, 1996) especially non-manufacturing and distribution industries (Fein, 1998; Quinn & Sparks, 2007a) as well as research into industry evolution over time (Quinn & Leavy, 2005). Malerba and Orsenigo observed that *"any serious attempt to build theory will have to come to grips with concepts such as firm competences, boundaries and connections"* (1996:84) highlighting additional facets of industry evolution worthy of exploration.

Firm level activities are essential to understanding brand's role in change. Emerging strategic management theories especially dynamic capabilities (Teece, Pisano, & Shuen, 1997) and resource orchestration (Sirmon, Hitt, Ireland, & Gilbert, 2011) connect firm level activities with industry evolution. Demand-side strategy emphasizes that business strategy must create incremental customer benefits to create value from innovation (Priem, 2007). Over time economic entities expand or contract their boundaries but difficulties exist in determining the nature of industry boundaries. This problem is aggravated by rapid innovation and disruptive technologies (Christensen, 2011) and under-estimations of inter-firm power (Porter, 1980, 1985), capabilities (Jacobides & Hitt, 2005) and identity (Santos & Eisenhardt, 2005). The relevance of these firm level theories to brand and branding and their influence on industry boundaries is under-explored.

It is observed that brands influence re-emerging industry structures following the breakdown of institutions (e.g. Casadesus-Masanell & Yoffie, 2007; Duguid, 2003, 2010; Olins, 2003) but not how this occurs. Similarly research has demonstrated the importance of institutions in industry evolution but there is insufficient research on how and why industry's institutional structure

changes over time (Cacciatori & Jacobides, 2005). Industry architecture research connects industry change, capability theories, firms' scope and governance structures, inter-firm relationships and institutional structures with power, superior value capture and brand's role in certifying quality (Jacobides, Knudsen, & Augier, 2006:Jacobides, 2008). However this stream of scholarship lacks a significant consumer-side dimension that understanding the influence of brand may provide.

The literature identifies multiple definitions of brand underscoring different conceptions of its nature. There is agreement that brand is an intangible asset of the firm but the nature of this asset is contested. Without clarity on the variable under study how can its relationship with industry evolution be determined? The working definition used to frame the research was an evolved definition located in the brand literature that is *"a cluster of values that enable a promise to be made about a unique and welcomed experience"* (de Chernatony, 2009:104).

1.4 RESEARCH GOALS AND POTENTIAL CONTRIBUTION

Maxwell (2005) identifies three types of goal: personal, practical and intellectual. Personal goals were addressed in the motivation to the study, practical goals are directed towards what the research will accomplish and should inform the research question. Intellectual goals are aimed at understanding, gaining insight into something and / or answering a question not addressed before. They form the basis of the research question. However intellectual goals include understanding unexplained phenomenon arising during the course of the research. The achievement of intellectual goals contributes to the achievement of practical goals.

1.4.1 Research Question

The research rationale provides a basis for developing some initial research questions which frame the study and influence the choices made during the course of the programme. This includes decisions about which literatures to review, what theories may be pertinent and what methods to employ. This loose framing ensures that the researcher's mind is kept open to areas of knowledge that might reveal unanticipated phenomena and relationships (Maxwell, 2009). In this context the principle question the research seeks to answer is:

- How do brands influence industry evolution?

By asking 'how' it assumes that brands do exert an influence and that the anticipated answer must be a process, mechanism or relationship. In order to answer this question it is necessary to understand exactly what a brand is resulting in a secondary, definitional question:

- What is the nature of brand?

1.4.2 Intellectual Goals and Potential Contribution

The primary conceptual goal of this research is to ascertain whether brands influence industry level change and if they do then how is this achieved? Industry level change will be explored within its

context over time and across multiple levels. The study aims to understand how branding emerges in an industry and how approaches to brand and branding evolve over time. Through analysing the agency deriving from all types of brand it seeks to uncover generalized patterns irrespective of the material asset brand's complement or the industry within which they compete. Through achieving these goals it is hoped to generate a conceptual framework connecting these disparate areas of knowledge. The second objective is to establish the elemental nature of brand. It is hypothesised that this will provide the basis for theoretical explanations of the primary goal.

1.4.3 Practical Goals and Potential Contribution

The intended contribution of this research to practice is to make brand meaningful and accessible to senior managers, even those from disciplines traditionally sceptical of marketing and brand. This will require outlining the centrality of brand to superior value creation and capture and reframing the debate in the language of strategy. Secondly, to serve as the basis for a guide to the potential use and management of brand as a more integral element of the strategic decision making process. This knowledge may be especially significant in the digital era where debates on the impact of the Internet and social media are of concern to brand owners. Finally, the case studies will offer a historical interpretation of the evolution of two service industries and their brands which is of interest to the industry and their service providers, particularly advertising and brand agencies.

1.5 PHILOSOPHY AND APPROACH

Mir and Watson (2001) charge researchers to make their philosophical assumptions transparent. This researcher takes a critical realist world-view assuming there is a reality that can be uncovered, that objects under investigation have mechanisms that can be actualized to create outcomes and that things influence other things in a sensible manner (Bromiley, 2005; Sayer, 1992). Critical realism assumes that it may be impossible to have perfect comprehension and therefore research is a continual process of conceptual improvement. This epistemological perspective is important not only with respect to the collection and analysis of empirical data but equally in the approach to the review of the literature. Knowledge may lie buried in the literatures but never interpreted in a way that facilitates answering these specific research questions.

This research is conducted through the paradigm of strategic management which grew through 'promiscuous borrowing' from other disciplines forming an 'untidy quilt' of theoretical explanations (Pettigrew, Thomas, & Whittington, 2002). Likewise industry evolution and brand have extensive roots and no general theory. Therefore to paraphrase Giddens *"[I]n formulating this account ... I have not been reluctant to draw upon ideas from quite divergent sources"* (1984:xxii). This raises issues of incommensurability between theoretical paradigms (Kuhn, 1970) which will be addressed through applying an evolutionary approach.

1.6 STRUCTURE OF THE THESIS

The structure of this thesis has three major divisions. Following this short introduction which identifies the research goals Chapters 2 and 3 provide the conceptual background and approach. The second part (Chapters 4 and 5) presents the empirical material and the last part (Chapters 6 and 7) present the analysis and the conclusions of the study. At each stage choices are made influencing the outcome of the process and these will be made transparent to the reader to facilitate better understanding of the thesis' journey.

Chapter Two commences with a review of the relevant literatures. Any attempt to cover the entire industry evolution, strategic management and brand literatures is doomed to fail, the scope is too large. Therefore the focus is narrowed to highlight themes of particular relevance to the core of the study. After reviewing these core literatures the chapter identifies areas of overlap between the literatures and gaps in knowledge. It progresses to a review of the literatures surrounding human agency, decision making and the nature and process of change including evolutionary and coevolutionary approaches. Building on previous research in the domain of industry evolution and sensitive to the importance of firm level theories in brand management, five organization theories are identified as the most germane for explaining brand's influence on industry evolution. These are transaction cost economics (TCE), Resource Dependency Theory (RDT), New Institutional theory (NIT), Resource-Based Theory (RBT) and Population Ecology (PE). This theoretical framework and extant knowledge form a conceptual framework that helps refine the questions. Chapter 2 concludes with the refined research questions and an exploratory framework which together guide the data collection, empirical analysis and conceptual development.

Chapter 3 introduces the methodology and methods employed in this study and its fit with the conceptual framework, questions and the world-view of the researcher. Following an introduction to contextualism, the chosen methodology, it presents a brief overview of the philosophy of science and its relevance to the study of the social world thereby setting a context for choices made in conducting this research. It elaborates on contextualism as a theory of methodology and method and why it is appropriate for carrying out multi-level inductive research enabling both the process and outcome of change to be explored (Mjøset, 2009). This is followed by a discussion of the comparative, longitudinal case based method. The chapter introduces the theoretical basis for the research implementation from its design, data collection and data analysis techniques to its final presentation in this thesis. It then details the choices made in the execution of this study including an expert research phase and selection of telecommunications (telecoms) as an industry to contrast with wholesale grocery. A total of 72 interviews were conducted and over a thousand secondary sources reviewed[3] spanning a period from the 1950s to 2012 generating large volumes of data for

[3] Not all of these sources were included in the final case narratives but are likely to have had some influence on the overall knowledge of the researcher.

analysis. Issues of validity inherent in the method particularly with respect to its reliance on archival data and the memories of interviewees are discussed.

Chapters 4 and 5 present the empirical evidence in the form of two detailed case narratives constructed from the data collected. Chapter 4 commences with a brief summary of the expert research phase which gives an overview of understanding of brand in Ireland by practitioners and experts. The two case narratives follow a chronological format periodized initially with respect to significant events and then by brand, the phenomenon under review (Hollander, Rassuli, Jones, & Dix, 2005). Chapter 4 describes the wholesale grocery industry and the influence of brands owned within the industry itself and by suppliers and customers on structural and architectural change. It identifies the time at which branding emerged in the industry and the subsequent evolution of both the industry and its brands. It also includes a number of embedded firm level cameos. Chapter 5 adopts the same approach with respect to the telecoms industry.

Chapter 6 presents the analysis of the case data guided by the exploratory framework and research question. Commencing with an overview of the within case analysis for each industry it moves on to the cross case analysis starting with an analysis of the influence of the inner and outer context, the nature and management of brands before exploring the agency of brand. It identifies seven unique, complementary processes through which brand influences change in the industry structure and industry architecture. Chapter 7 links the empirical findings of the study with the theoretical framework and existing knowledge on brand and industry evolution. It identifies the elemental nature of brand as a social technology and proposes a new definition of brand. It applies a coevolutionary framework to the data and takes a multi-level approach to building the findings, demonstrating the influence of brand on the permeability of industry boundaries and how brands mediate the interface between the production and consumption environments to effect change. It ends by highlighting contributions to knowledge and practice and proposes a future research agenda. Finally some appendices are included providing additional information on the project.

This introduction has identified that there is a gap in extant understanding of how brands influence industry level change and that to answer this question effectively the elemental nature of brand must first be explicated. The balance of this thesis will seek to answer these questions thereby making a contribution to knowledge and practice. In the next chapter the process of developing a conceptual framework will commence through interrogating the brand, industry evolution and strategy literatures.

CHAPTER 2 LITERATURE REVIEW

2.1 INTRODUCTION

The first step in building the conceptual framework is a review of the literatures to establish what is known about brand's role in industry evolution. This exploration is influenced by the two interim questions introduced in Section 1.4.1:

- How does brand influence industry evolution?
- What is the nature of brand?

As the potential literature base is vast choices have been made to balance the breadth of the literatures with the depth of understanding required. The chapter will show that the literature addressing the questions is incomplete, creating an opportunity for contributions to knowledge.

This research is framed by three literatures, brand, industry evolution and strategic management each with heterogeneous disciplinary and theoretical foundations. Certain concepts may be differentially interpreted in each literature making definition of key concepts important. Figure 2-1 illustrates the literature landscape. The shaded areas highlight the literature overlaps which are the focus of this research.

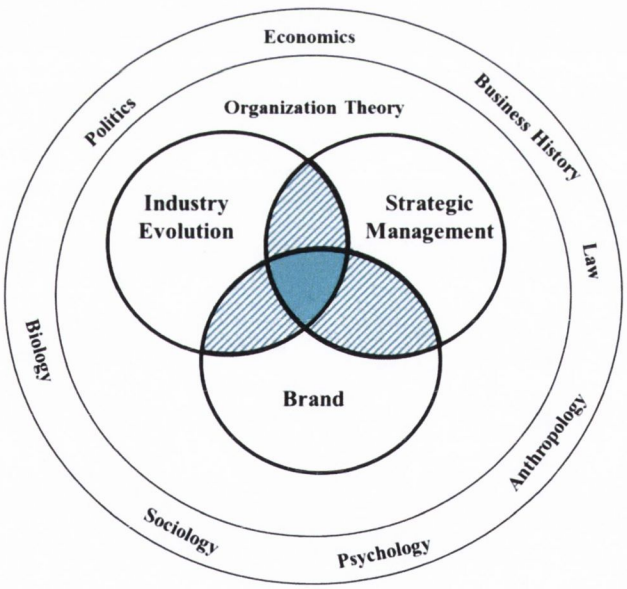


Figure 2-1 The Literature Landscape

The disciplinary lens is strategic management and the last part of this introduction gives a brief overview of the field and why industry evolution is important to strategy scholars. The chapter progresses to explore the nature of brand and the importance of brand strategy and management drawing on diverse literatures particularly marketing. Section 2.3 reviews the industry evolution literature exploring the structure and dynamics of industries and how these change. This includes

emerging firm level strategic management theories and research on industry architecture which sits at the intersection between strategy and industry evolution. These may help explain how brands influence industry evolution. Overlaps with brand are woven into Section 2.3 and the forensic approach used to extract brand-related material may hyperbolize its standing within them as brand is not central to studies of industry evolution or strategic management.

Having established the intersection and gaps in the literatures where the contribution will be made the review moves on to exploring how change comes about. Section 2.5 explores the role of human agency in change, the nature of change and the process theories which explain how change is brought about across multiple levels of analysis. In Section 2.6 five organization theories are explored to form a common theoretical framework minimizing the risk of incommensurability between the fields. The chapter concludes by stating the research questions and outlining the exploratory framework.

2.1.1 Strategic Management and Industry Evolution

Strategic management is a multi-modal discipline centred on the study of strategy and organizational success (Markides, 2004; Porter, 1996). It emerged as an academic field in the 1960s building on studies of economic organization and bureaucracy (Furrer, Thomas, & Goussevskaia, 2008) led by the processual case based approach work of institutional scholars such as Chandler (1962) and Ansoff (1965). From the 1970s economists and behaviouralists influenced the field, the work of Michael Porter representing an enduring contribution to its development. He bridged the gap between consultancy derived structure-conduct-performance paradigm (Bain, 1956, 1959; Mason, 1939, 1949) and industrial organization economics (IO/E) bringing the language of economics into strategy research (Pettigrew, et al., 2002). Only at the turn of the Millennium did strategic management emerge as a distinct theory-based field (Hoskisson, Hitt, Wan, & Yiu, 1999; Mahoney & McGahan, 2007) although it remains fragmented and lacking internal consistency (Ronda-Pupo & Guerras-Martin, 2012).

Strategy research comprises of content research, exploring what underpins firms' competitive advantage and process research, exploring how strategies emerge (Mellahi & Sminia, 2009). There are two streams of content research, one stating that superior organizational performance is derived from a firm's ability to seek a defensible position within an industry, the other locating the source of advantage within the firm based on its distinctive resources and competencies. Yet, if strategy is:

> *"the dynamics of the firm's relationship with its environment for which the necessary actions are taken to achieve its goals and /or increase performance by means of the rational use of resources" (Ronda-Pupo & Guerras-Martin, 2012:182)*

both environment and managerial intent within firms must be important in formulating strategy.

Porter observed that *"industries evolve because some forces are in motion that create incentives and pressures for change"* (1980:162). Industry evolution is the cumulative change in the characteristics of industries precipitated by these forces especially firm entry, exit, growth and decline. Theories emanating from many disciplines have been exploited to explain industry change (Garud & Van de Ven, 2002) and most research within the field has been cross-sectional (Barron, 2003) resulting in insufficient evidence of how industries change across time (Malerba & Orsenigo, 1996; Quinn & Leavy, 2005). Industry evolution is important to strategic management scholars because it helps explain change in the economic, social and cultural environment (Durand, 2006), structural and architectural changes in industries, interdependencies with strategic decision making and thus the basis of competitive advantage (Porter, 1980; Winter, 2005). Before exploring brand's role in industry evolution it is imperative to clearly define the nature and scope of brand.

2.2 BRANDS AND BRANDING

Traditionally brand was the purview of marketing hence its study was an aspect of marketing, consumer behaviour and marketing communications (marcoms) research. Brand theory drew on consumer and cognitive psychology exploring the processes of motivation (e.g. Maslow, 1954)[1], perception, learning and memory (Engel, Blackwell, & Kollat, 1978). This was augmented by interest from a miscellany of disciplines as brand's centrality to modern business and culture became apparent (da Silva Lopes & Duguid, 2010; Kornberger, 2010; Schultz, Hatch, & Larsen, 2000) with contributions from scholars of: economics, sociology, anthropology and archaeology, intellectual property and business history. These catholic views highlight different understandings of brand agency; most economic theory approaches adopting explicit rational actor models of behaviour whereas marketing takes a pluralistic approach (Casson & Wadeson, 2010).

Brand historians posit that primitive forms of branding symbolized information regarding the product's origin and quality to consumers and other channel members, acting as guarantors of quality within disaggregated value chains (Duguid, 2003, 2010; Moore & Reid, 2008). These 'proto' brands[2] displayed some dimensions of modern brands which are a phenomenon of the 19th Century when manufacturers exploited production technologies and lowering transportation costs to sell to mass markets (Chandler, 1977, 1990). Some suggest that the Industrial Revolution was less a revolution of production than of consumption facilitated by brand (Kornberger, 2010; McKendrick, Brewer, & Plumb, 1982; Wengrow, 2008). Brands evolved in tandem with trademark legislation, advertising practice and brand management. Trademarks protect and sustain brands (George, 2006a, 2006b). As legal instruments they protect against imitation (de Chernatony

[1] Maslow's hierarchy of needs suggests that people are motivated to fulfil their basic needs before moving to more advanced (higher order) needs. Often presented as a pyramid, the lower levels represent the basic physiological requirements such as food and water before moving on to the need for safety and security. Higher order needs become more psychological and social, the apex representing the need for self-actualization (Maslow, 1954).

[2] The term 'proto' brand was coined by Moore and Reid (2008) to describe the earliest brands.

& Dall'Olmo Riley, 1998) while simultaneously defending customers from opportunism (Duguid, 2003). Advertising agencies pioneered modern branding (Olins, 2003; Schwarzkopf, 2009) performing a mediating role between products and consumers (Schwarzkopf, 2010), determining what attributes to present and how they were communicated (Arvidsson, 2006b; Lury, 2004) creating differentiated images and personalities (Danesi, 2006). Brand management provided teams responsible for co-ordinating marketing with sales and manufacturing (Aaker, 1991) although brand managers were junior, their role tactical and their focus was horizontal competition between brands (Aaker & Joachimsthaler, 2000a; Davis, 2002).

From the mid-20th Century branding started to change. Economic development, the media, self-service shopping and the extension of the domain of brand were amongst the drivers of this change (Bastos & Levy, 2012; Lury, 2004). The locus of branding activity moving from consumer products to encompass retail, service, corporate, business to business (B2B), employer and internal brands. Gardner and Levy (1955) identified the centrality of branding to differentiation inspiring a new approach to creative advertising later reinforced by account planning (Lury, 2011). Brand management became institutionalised within organizational structures and brand consultancies emerged (Lury, 2011). Having given an overview of the emergence of brand the next section reviews current approaches to establishing what a brand is.

2.2.1 The Nature of a Brand

There is no universally accepted definition of brand (Jones & Bonevac, 2013) but there is agreement that they are intangible assets (Doyle, 2001; Itami & Roehl, 1987; Lev, 2001) which are idiosyncratic, hard to imitate and path dependent. They create difference (Moon, 2010) and encompass the tangible and intangible attributes of a product or service (Aaker, 1996b; Keller & Lehmann, 2006). Stephen King observed:

> *"A product is something that is made in a factory; a brand is something bought by a customer. A product can be copied by a competitor; a brand is unique. A product can be quickly outdated; a successful brand is timeless." (King, 1973:v)*

This encapsulates brand's difference from products, uniqueness and longevity and relationship with customers. Products are designed to match needs whereas brands are created to produce desires (Kornberger, 2010). Products become commodities when they take on some 'use value' (Bowman & Ambrosini, 2000) and commodities evolve into brands as the offering is augmented with associations and values which merge with consumer's values (Danesi, 2006). Commodities work via the logic of identity and brands via the logic of difference (Lash & Lury, 2007) inferring that competition is a necessary antecedent to brand.

Another antecedent to brand is risk. Without risk there is no requirement for brands (Kapferer, 2004). Risk and trust are interdependent conditions (Rousseau, Sitkin, Burt, & Camerer, 1998), trust being predicated on exchange parties being confident their vulnerabilities will not be exploited

(Barney & Hansen, 1994). Consequently trust is socially and psychologically complex and essential in situations of high perceived risk (Elliott & Yannopoulou, 2007). Customers are influenced by trust and brand signals the purchaser will not be deceived (Dyer & Chu, 2003; Gupta, Grant, & Melewar, 2008) and the product will perform to a high standard (Hamel & Prahalad, 1994). Thus brands represent a promise kept, a contract between seller and buyer (Clifton & Simmons, 2003), serving as a guarantor of quality (Duguid, 2003; Wernerfelt, 1988), creating powerful memories (Franzen & Bouwman, 2001), emotional attachment and psychological commitment (Oliver, 1999). This generates emotional switching costs helping create a defendable position in an industry (Aaker, 1991; Haigh, 2000; Porter, 1980).

Branding is the process of transforming commodities into brands (Bergstrom, Blumenthal, & Crothers, 2002) instigated by managerial or customer actions with both parties involved in creating value from it (Pennington & Ball, 2009). It aims to establish a differentiated presence in the market that attracts and retains customers by utilizing techniques or tools through which people attempt to control or transform the environment (Langlois, 2007). Branding routines are the capabilities by which agents create positive associations and meaningful differentiation (Jung, 2003). Brand extension is the process by which brands are leveraged to enter new markets (Aaker & Keller, 1990) using associations to draw inferences about a product or service (Kapferer, 2008). Properly managed brands adapt to changing societal needs, staying contemporary and outliving the firms that created them (da Silva Lopes, 2007). However, strong associations with a failing category can inhibit this ability (Danneels, 2011) and brands may revert to commodities if perceived differences are eroded.

An emerging view of the nature of brand is a central organizing principle. Drawing on strategic management and organization theory, branding is viewed as an organizational capability (Clegg, et al., 2011; Louro & Cunha, 2001) and brand as an integrating platform around which production and consumption are aligned to create value (Knox & Maklan, 1998). It therefore acts as a boundary spanning device (Hult, 2011) enabling brands to expand across markets (Vandermerwe, 2004). Some argue that brands are a social institution[3] that lend structure to industries' underlying market arrangements and processes (Arvidsson, 2006b; Power & Hauge, 2008). As an institutional phenomenon they counteract the effects of quality uncertainty (Akerlof, 1970) mediating between the emotional world of consumption and the rational world of production, the product of ongoing processes of interactions between economic actors (Lury, 2004; Power & Hauge, 2008). Brands facilitate rather than constrain choice (Heath, 2000) and as institutions help lower transaction costs (Nelson, 2005). Moreover, brands legitimize products, services or organizations.

[3] Scott (1987:499) defines a social institution as a *"relatively enduring systems of social beliefs and socially organized practices associated with varying functional arenas within societal systems, e.g., religion, work, the family, politics"*

This discussion indicates that there are disparate views on the nature of brand. De Chernatony and Dall'Olmo Riley (1998) support this view suggesting that brand is a multidimensional construct around which executives have diverse interpretations[4]. Kornberger (2010) suggests that brand may be conceived as a management tool, a corporate catalyst, a sign, or a media. Thus these scholars propose that to make sense of brands they should be conceived as not one thing but many.

Integral to the nature of brand is its ability to evolve. As brand sophistication matures, the scope of the concept evolves from identification and certification, through functional differentiation towards emotional attributes (Kunde, 2000; McEnally & de Chernatony, 1999). Goodyear (1996) identifies five evolutionary stages linked to the rise of consumerism: unbranded; brand as reference; brand as personality; brand as icon; and brand as policy. Brand's potential to move up the spectrum is predicated on evolving interpretations of brand management (de Chernatony, 2009) (Figure 2-2). In concert with this evolution the definition of brand has evolved from the American Marketing Association definition[5] to *"a cluster of values that enable a promise to be made about a unique and welcomed experience"* (de Chernatony, 2009:104). This definition captures how emphasis may initially be place on functionally orientated values[6] and becomes augmented as brand management sophistication increases (de Chernatony, 2009).

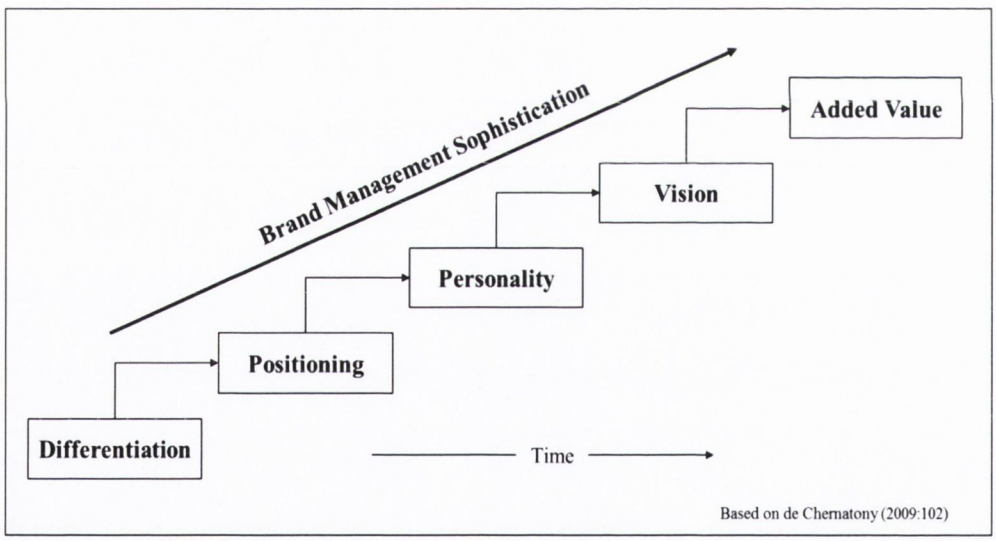


Figure 2-2 Evolving Interpretations of Brand.

[4] De Chernatony and Dall'Olmo Riley (1998) identified twelve constructs of brand through their analysis of the literature: legal instrument; logo; company; shorthand; risk reducer; identity system; image in consumers' minds; value system; personality; relationship; adding value; evolving identity.

[5] The American Marketing Association define brand as a *"Name, term, design, symbol, or any other feature that identifies one seller's good or service as distinct from those of other sellers".*

[6] Values are defined as *"an enduring belief that a specific mode of conduct or end-state of existence is personally or socially preferable to an opposite or converse mode of conduct or end-state existence"* (Rokeach, 1973:5 cf de Chernatony, 2006).

2.2.1.1 Different Forms of Brand

Within the literature there are distinctive streams relating to different forms of brand. This section briefly reviews the literature with respect to service, B2B, corporate, employer and internal brands and finally distributor brands[7].

Service Branding

Service brands represent customer's service experience requiring the building of positive emotional connections (de Chernatony & Segal-Horn, 2001; Klaus & Maklan, 2007; Morrison & Crane, 2007). The consumer buys the organization's capabilities and expertise so the delivery of service brands rests on employees' behaviour (Berry, 2000; Free, 1999). Senior management engagement is vital in securing the organizational commitment necessary for the branding process to succeed (Free, 1999; King, 1991) with organizational culture determining its likelihood of success (de Chernatony, 1999). Service branding is integral to distribution and corporate branding (de Chernatony & Segal-Horn, 2001; Olins, 2003) and in branding hi-tech industries and utilities (He & Li, 2011; Paladino & Pandit, 2012).

Business-to-Business Branding

Some of the World's most valuable brands are B2B yet B2B branding was under-explored until a surge in research was precipitated by macro-level changes challenging prevailing views of rational organizational buying behaviour (Leek & Christodoulides, 2011; Lindgreen, Beverland, & Farrelly, 2010). It became accepted that B2B buyers are susceptible to influence and bias including the emotional aspects of marketing (Leek & Christodoulides, 2012; Lynch & de Chernatony, 2004). Brands offset personal and organizational risks associated with purchase decisions (Brown et. al., 2011; Hutton, 1997) with factors such as trust, prestige and career security influencing decisions (Lindgreen, et al., 2010; Mudambi, 2002; Sweeney, 2002). The benefits of B2B brands may extend to channel members, facilitating channel relationships (Anderson & Narus, 2004; Glynn, Motion, & Brodie, 2007; Roberts & Merrilees, 2007). Company representatives are important in building relationships emphasizing the importance of the corporate brand (Gupta, Melewar, & Bourlakis, 2010), while the need for ongoing support is a determinant in brand choice indicating that B2B services stand to gain most from branding (Ballantyne & Aitken, 2007). Finally large firms with significant brand equity can use brand to leverage the assets of smaller firms following merger and acquisition activity (Lambkin & Muzellec, 2010).

The language of branding has been a barrier to acceptance by B2B buyers so some research employs proxies including reputation, identity and culture to uncover the logic of branding (Blombäck & Axelsson, 2007; Wong & Merrilees, 2005). This is echoed in overlaps in the

[7] This is not a definitive list of brand types. Others include: heritage brands; nation brands; city brands; person and personal brands; family brands.

literature between branding and organizational identity (Cornelissen, Haslam, & Balmer, 2007; Olins, 2003) and corporate reputation (Fombrun, Gardberg, & Sever, 2000; Rhee & Valdez, 2009).

Corporate Branding

Corporate branding builds on the concept of company brands (Heller, 2010). Muzellec and Lambkin (2009) identify three types of corporate brand; the trade name; the business brand; and the holistic corporate brand addressing all stakeholders[8]. They are a visual, verbal and behavioural expression of the business model (Knox & Bickerton, 2003) grounded in corporate heritage (Balmer & Gray, 2003), their objective being to establish a favourable disposition towards the organization. Brands become the integrative function that manages the organization, necessitating a multi-disciplinary approach to brand management (de Chernatony, 2006) and requiring engagement by the CEO and senior management (Balmer, Stuart, & Greyser, 2009; Knox & Bickerton, 2003). Organization theorists Hatch and Schultz (2001, 2003, 2008) have spearheaded corporate brand theory describing a framework based on aligning strategic vision, organizational culture and corporate image. Organizational identity is a pre-requisite for establishing corporate brands (Balmer, 2012), corporate brand management seeks to reduce gaps between identity, reputation and image and corporate brand equity is derived from its integrative force (Hatch & Schultz, 2008). Hatch and Schultz (2008) explain corporate brand's influence on organizational change using a model built on Hatch's (1993) cultural dynamics model. De Chernatony and Cottama (2008) found misalignments between culture and brand when brand management was inconsistent within changing organizational cultures. Rebranding changes organizational identity and is likely to coincide with other organizational changes (Daly & Moloney, 2004; Muzellec & Lambkin, 2006), however because culture is unique corporate brands may lack saliency following a merger or acquisition (de Chernatony, 2006; Hatch & Schultz, 2001).

Employer and Internal Branding

Employer branding emerged as a distinct concept in the mid-1990s its remit evolving from recruitment advertising and internal communications to encompass employees' ongoing experience of that employer and to retain talent (Barrow & Moseley, 2005; Rosethorn & Bernard Hodes Group, 2009). Internal branding is a systematic effort to shape employees' frames of reference and values to achieve consistency with the external brand (Ind, 2007; Punjaisri & Wilson, 2011). Internal brand programmes involve a range of managerial practices to embed values throughout the organization (Ind, 2007; Mitterer & Brice, 2007) requiring strong cross-functional relationships particularly with HR (Coleman, de Chernatony, & Christodoulides, 2011). Its success rests on the commitment of the senior managers (de Chernatony, Cottoma, & Segal-Horn, 2006) who may not be brand enthusiasts. Confusion about the role of brand can result in cynicism towards these

[8] Stakeholders include customers and consumers, investors, suppliers, distributors, partners, government, the community, the media and employees.

programmes and an assumption that they are marketing initiatives (Ind, 2007). Therefore some organizations position internal branding in terms of mission, vision and values and avoid the term brand (Ind, 2007). Tarnovskaya and de Chernatony (2011) posit that the processes of sensemaking (Weick, 1995) and sensegiving (Gioia & Chittipeddi, 1991) in internal branding could result in clearer identities and more aligned behaviour across cultural settings.

Brands in the Distribution Channel

Retail brands incorporate three interlinked perspectives: the product; the store; and the retail organization. They have evolved steadily since the 1960s and now dominate many categories (Burt, 2010; Kapferer, 2008) including on-line retail brands. Own brand[9] products initially competed on price and served as a means of circumventing resale price maintenance (Miskell, 2010). As growth in own brand accelerated quality differentials with proprietary brands narrowed (Burt & Davies, 2010) and own brands became sophisticated segmented ranges trusted by consumers (Burt & Davies, 2010; Dawson, 2004). Retailers innovated under own brand offering products that kept pace with societal trends (Burt & Sparks, 2003; Kapferer, 2008). Consumers remain more likely to select own brand from low involvement categories where perceived risk is low or when the retailer brand has acquired its own symbolic stature (Kapferer, 2008). Some retailers sell only own brand others also sell manufacturers' brands to increase their range and generate consumer pull (Ailawadi & Keller, 2004). Thus own brand, manufacturer brands and generic products make up retailers' product portfolios (Ailawadi & Keller, 2004).

The store creates the context within which the consumer interacts with the product and the company[10] and *is* the brand in the eyes of consumers and other stakeholders (Dawson, 2004; Esbjerg & Bech-Larsen, 2009). Retailer brand image and position are differentiating factors (Burt & Sparks, 2003), their retail brand architecture being a manifestation of product assortment and the store as a brand itself (Esbjerg & Bech-Larsen, 2009). Through investments in advertising and merchandising differentiated retail brand identities are as important to consumers as proprietary brands (Miskell, 2010). At the organizational level retail brands are multidimensional and multi-sensory in nature (Ailawadi & Keller, 2004; Burt, 2010), facilitating branded retail format strategies incorporating the corporate and a formula brand (e.g. Tesco Extra) and assisting segmentation and geographic expansion (Dawson, 2004; Kapferer, 2008). Retail brands coevolved with other developments in retail processes and management including a reduction in store level decisions and increasing central control underpinned by sophisticated retail and distribution technologies and standardized store formats (Burt & Sparks, 2003).

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[9] The term own brand is used throughout this document to encompass all distributor owned brands. Within the literature a range of terms are encountered including private label, private brands, own label, store brands, exclusive brands and retail brands. Whilst some authors ascribe different meanings to each, there is significant overlap.

[10] This store may be physical or virtual (Burt, 2010).

There is little research on wholesaler or caterer brands although evidence suggests wholesale brands signal product and service quality engendering trust (Kenning, Grzeskowiak, Brock, & Ahlert, 2011; Morgan, Deeter-Schmelz, & Moberg, 2007) so wholesalers with high brand equity may be able to charge a premium (Fernandez-Barcala & Gonzalez-Diaz, 2006). Wholesalers create own brand products for retailers and institutional caterers (Dawson, 2004). Through voluntary group retailing (VGR) wholesalers mimic the business model of vertically integrated multiple retailers (Competition Authority, 2008) including controlling own brand procurement, brand architecture, store branding and customer experience (Dawson, 2007; Olsson, Hulthén, & Gadde, 2012). Therefore, most of the retail branding literature is relevant to wholesaler-managed brands.

2.2.2 The Management of Brands

Approaches to brand strategy and management are primarily located in the marketing literature despite brand being an integral element of business strategy. Branding is a differentiation strategy and is perceived as strategic or tactical depending on the level at which it is directed within the firm (Mintzberg, Ghoshal, & Quinn, 1998). From its tactical origins brand management started to acquire higher status in firms' management, guiding leaders' strategic decision making (Aaker & Joachimsthaler, 2000a) and informing operations across the internal value chain (Kotler, Pfoertsch, & Michi, 2006; Tilley, 1999). However in some firms brand remains restricted to marketing departments whose influence is declining (Day & Montgomery, 1999) and for whom boardroom respect is eroding (Nath & Mahajan, 2008). Marketing is generally seen to 'own' brand and uncritical belief in branding (Doyle, 2001) plus proliferation in brand terminology[11] helps create confusion and scepticism. Branding decisions can have unintended consequences which may be negative such as in consumer avoiding behaviour (Capon, Berthon, Hulbert, & Pitt, 2001) or positive as in the creation of an *"accidental brand"* by Intel (Duguid, 2010:154).

Louro and Cunha (2001) identified four central paradigms of brand management ranging from the product paradigm, reflective of the traditional brand management, to the relational paradigm which engenders a longer-term strategic approach. Brand management's purpose is to maximize and leverage brand equity to increase value creation and ensure the firm is rewarded for its efforts (Raggio & Leone, 2007) cognisant that sources of brand equity may lie outside the brand-consumer relationship particularly within the channel (Jones, 2005; Pennington & Ball, 2009). Brand orientation is a model introduced by Urde (1994, 1999) generating a vibrant stream of research (Baumgarth, Merrilees, & Urde, 2013). Influenced by the resource based view (RBV) of the firm (Barney, 1991) it is a business philosophy involving the entire organization (Simoes & Dibb, 2001). Brands are regarded as strategic resources (Amit & Schoemaker, 1993) and organizational practices orientated to brand building. Brand management is a core competence (Prahalad &

[11] These terms include 'brand communities', 'brand equity', 'brand identity', 'brand strategy', 'brand image', 'brand reputation', 'brand promise', 'brand culture', 'brand experience', 'brand positioning', 'brand love', 'brand loyalty, 'brand architecture', 'brand awareness', 'brand essence', 'brand visioning' and 'brand filter'.

Hamel, 1990) and brands regarded as the source of competitive advantage (Hirvonen, Laukkanen, & Reijonen, 2013; Urde, 1999, 2009). Empirical evidence of its benefits have been found for B2B and business to consumer (B2C) firms of different sizes and ages in product and service industries (Gromark & Melina, 2011; Hirvonen, et al., 2013; Wong & Merrilees, 2005, 2008).

2.2.2.1 Brand Architecture

Architecture is the *"overall design of a building, structure, or system that unifies its components or elements into a coherent and functional whole"*[12] . Applied to brands (Aaker & Joachimsthaler, 2000b), capabilities (Jacobides, 2006), organizations (Ethiraj & Levinthal, 2004), industries (Jacobides, et al., 2006) or distribution channels (Castaldo, Grosso, & Premazzi, 2013), architectures help identify how complex systems interact to create a *"whole [that is] more than the sum of the parts"* Simon (1962:468).

Brand architecture, sometimes referred to as brand strategy, is the organizing structure of the brand portfolio that specifies brand roles and the relationships between brands (Aaker & Joachimsthaler, 2000b). Different nomenclatures are used to describe these architectures (see for example Aaker, 1996a, 2004; Kapferer, 2008; Laforet & Saunders, 1994; Olins, 2003) reflecting a continuum of branding strategies from branded house (a master-brand or corporate brand strategy) to a house of brands (standalone product-brand strategy). Pure examples are rare with most companies evolving towards a mixed (or endorsed) architecture (Rajagopal & Sanchez, 2004). Each carries benefits and risks to an organization (Laforet & Saunders, 1994, 1999, 2005) and consequently different effects on the intangible firm value (Rao, Agarwal, & Dahlhoff, 2004). Brand architecture may be intentional or a consequence of past management decisions and the company's evolution particularly through mergers and acquisitions (Knudsen, Finskud, Törnblom, & Hogna, 1997; Rao, et al., 2004). Typically brand portfolio management involves a supply side analysis of company owned brands although characteristics of the industry in which they compete have influence. Where products are strongly culturally embedded local or national brands are likely to proliferate but where customer preferences and desired product attributes are relatively homogenous there is greater opportunity for global brands (Rajagopal & Sanchez, 2004). Some brands are 'born global' whilst others evolve into global brands, often subsequent to merger and acquisition (Casson & da Silva Lopes, 2010; Knudsen, et al., 1997). Economies of scale and scope, homogenisation of consumer tastes and accelerated speed to market drive the emergence of global brands (Steenkamp, Batra, & Alden, 2002). Many companies adopt a 'multi-local' philosophy towards their global brands adapting them to the local market needs (Kapferer, 2008) whilst ethnocentric consumers[13] may necessitate the retention of local brands.

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[12] This definition is found at http://www.businessdictionary.com/definition/architecture.html

[13] Consumer ethnocentrism is the *"the beliefs held by consumers about the appropriateness, indeed morality, of purchasing foreign-made products"* (Shimp & Sharma, 1987:280). Ethnocentric consumers take pride in their country's brands, symbols and culture

Managing brand architectures may involve rebranding at the corporate, business unit or product level (Kaikati & Kaikati, 2003; Muzellec & Lambkin, 2006). Rationalising the portfolio is one reason for rebranding but it may be precipitated by changes in the corporate parent or to keep a brand contemporary (Pringle & Field, 2008). Change may be restricted to aesthetics or encompass a change in brand positioning along a continuum from evolutionary to revolutionary change (Muzellec & Lambkin, 2006; Stuart & Muzellec, 2004) requiring a balance between retaining brand equity and seizing opportunities the existing brand cannot meet (Luck, 2012).

2.2.2.2 Managing Brand Communications

Brand's power to influence relies on brand image, a representation system of mental associations shaped over time through accumulated brand related experiences (Kapferer, 2008). Marketing communications (marcoms) are the messages and the media firms deploy to communicate with the market. They include advertising, direct marketing, sales promotions, sponsorship, events and experiences, public relations (PR), personal selling and digital marketing (see Figure 2-3). They have traditionally been and largely remain a key element of brand management. Most marcoms theories developed in the 1950s and 1960s in tandem with fast moving consumer goods (FMCG) marketing (Schultz & Schultz, 1998). At that time individual managers were responsible for discrete elements of the marcoms mix including creative strategy and budgets (Kitchen, 2005). This included maintaining an effective share of voice (SOV), the percentage of advertising expenditure for one brand within the total advertising expenditure for that product category.

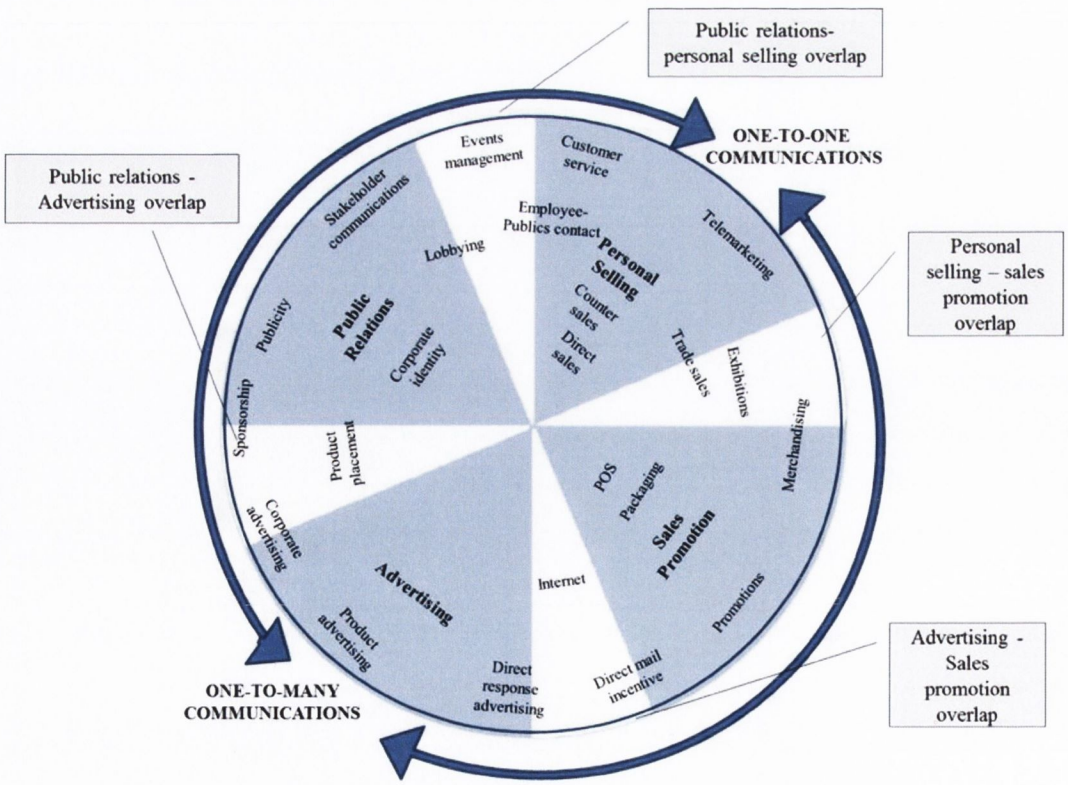


Figure 2-3 The Marketing Communications Mix

From the late 1990s integrated marketing communications began to gain popularity encompassing a cross functional approach to managing brand aimed at delivering consistent brand experiences (Pickton & Broderick, 2005). Contemporaneously customer relationship management (CRM) emerged as a management priority predicated on identifying and retaining the customers most valuable to the business (Dyche, 2002). This represented a move from a transactional to a more collaborative relationship between buyers and sellers (Fernie, 2009). Corporate social responsibility (CSR) activities are attempts by firms to improve their reputations and build brands (Ogrizek, 2002; Osterhus, 1997). Embracing a spectrum of mechanics from cause-related marketing to philanthropy many are supported by marcoms which help shape consumer attitudes to the initiative and the organization behind it (Wang & Anderson, 2011).

The rise of the Internet and new media[14] upended how consumers engage with brands (Edelman, 2010). Asymmetric relationships have been superseded by a multidirectional, interconnected process of dialogue and co-creation that the brand owner no longer controls (Christodoulides, 2009; Hennig-Thurau, et al., 2010). The increase in the number of stakeholder touchpoints emphasizes the importance of a compelling brand promise delivered before, during and after purchase (Barwise & Meehan, 2010:Edelman, 2010). Brand users employ the Internet to test the integrity of a brand, forcing transparency and accountability (Aula, 2010; Jones, Temperley, & Lima, 2009).

2.2.3 Brands and Value Creation and Value Capture

Brand's ability to create and capture value is important in building competitive advantage and performance thereby influencing industry structure. There is confusion between 'brand equity' and 'brand value' (Ambler, 2003). The former is what a brand means to stakeholders and the asset itself whereas the latter is the market value of the brand (Ambler, 2003; Raggio & Leone, 2007). Jones (2005) identifies three literatures on brand equity (mental, behavioural and financial) but the most prevalent distinction is between customer and financial brand equity (Christodoulides & de Chernatony, 2010). Customer-based brand equity is the differential effect of brand knowledge on consumer response to brand stimuli relative to similar products (Keller, 1993). It is an asset when positive or a liability when negative (Neal & Strauss, 2008). Consumer knowledge manifests as brand equity which provides value by enhancing competitive advantage, acting as a barrier to entry, generating marginal cash flows and providing a strategic bridge from the past to the future (Aaker, 1991; Keller, Apéria, & Georgson, 2008). It is therefore important in the temporal nature of change. Most explanations of brands' value creating role are cross sectional although some longitudinal studies on specific brand types have emerged (e.g. Arnett, Laverie, & Wilcox, 2010; Grisaffe & Nguyen, 2011). Financial brand equity is the accumulated asset from past marketing

[14] New media are websites and other digital communication and information channels in which active consumers engage in behaviours that can be consumed by others both in real time and long afterwards regardless of their spatial location. (Hennig-Thurau, et al., 2010:312)

that has not been taken into profit and is a conditional asset because to deliver financial value it needs to work in conjunction with other material assets (Ambler, 2003; Kapferer, 2008).

Brand value is predicated on what buyers will pay for the asset and is addressed in the financial accounting literature. Since the 1980s when Nestle paid a premium for Rowntree Macintosh's brand portfolio, recognition of the intangible asset value of brands has increased (Clifton & Simmons, 2003; King, 1991; Leone, et al., 2006) although research in 2005 revealed almost half of financial analysts were uninterested in brands when evaluating companies seeing no objective way of measuring their value (Pringle & Field, 2008). Brand equity metrics are key marketing performance indicators with a plethora of methods of measurement (Christodoulides & de Chernatony, 2010) all sharing the premise that the power of the brand lies in the mind of the consumer (Leone, et al., 2006). Consultancy and market research firms have proprietary methodologies which occasionally appear in scholarly research despite sharing little common ground in terms of constituent dimensions (Christodoulides & de Chernatony, 2010)[15]. Brand loyalty is present when favourable attitudes for the brand manifested in repeat buying behaviour (Keller, 1993). Aaker (1991) conceives it as an element of brand equity, being a reflection of the propensity of a customer to switch. Strong loyalty reduces the brand's vulnerability to competitive activity (Aaker, 1991). It is equally important in B2B situations where it may be identified as firm or company loyalty (Gordon, Calantone, & di Benedetto, 1993).

Explanations of how firms create value through brand include: leveraging brand equity; reducing perceptions of risk; acting as an isolating mechanism (Dedrick, Kraemer, & Linden, 2010; Keller, 1993); attracting inward capital (Arvidsson, 2006a); certifying quality (Duguid, 2010); and increasing staff motivation thereby increasing customer satisfaction (Haigh, 2000). Brands support diversification into new markets (King, 1973) even in high tech industries where its quality and trust signals mitigate unknown aspects of new technologies (Duguid, 2010; Levitt, 2004).

Through an analysis of a broad range of the brand literature[16] this author identified twelve roles that branding can fulfil and a variety of explanations of how they accomplish these roles (Marks & Quinn, 2010). These roles are:

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[15] These commercial measures include Millward-Brown's BrandZ and Interbrand's Brand Strength.

[16] This table was built through an analysis of over 50 books and published articles in the literature. An iterative process of deduction and induction was then used to refine the data drawing on additional sources. Sources used include: Aaker, 2004; Aaker & Joachimsthaler, 2000a; Ambler, 2003; Anderson & Narus, 2004; Argenti & Druckenmiller, 2004; Arvidsson, 2006a; Balmer, 1998; Balmer & Gray, 2003; Bullmore, 2001; Capon, et al., 2001; Clifton & Simmons, 2003; Court, Forsyth, Kelly, & Loch, 1999; Da Camara, 2007; Davis, 2002; Davis & Dunn, 2002; de Chernatony, 1999, 2006; de Chernatony & Dall'Olmo Riley, 1998; de Chernatony & McDonald, 1992; Doyle, 2001; Duguid, 2003; Fernandez-Barcala & Gonzalez-Diaz, 2006; Free, 1999; Gioia, Schultz, & Corley, 2000; Gupta, et al., 2008; Hague & Jackson, 1994; Haigh, 2000; Hatch & Schultz, 2001; Holt, 2004; Ind, 2007; Interbrand, 1990; Jones, 2005; Jung, 2003; Kapferer, 2004; Keller, 1993; Keller, et al., 2008; Keller & Lehmann, 2006; King, 1991; Knox & Bickerton, 2003; Kornberger, 2010; Kotler & Pfoertsch, 2007; Levitt, 2004; Louro & Cunha, 2001; Lury, 2004; Mühlbacher &

- Reduce perceived risk
- Differentiate from competition
- Communicate quality and value
- Act as interface between firm and customer
- Create efficiencies (economies of scale and scope)
- Shift balance of power within value creation chain
- Generate and protect future revenues
- Assist growth and maintenance of company reputation
- Facilitate inter-firm collaboration and cooperation
- Legitimise corporate behaviour and activities
- Effect organizational culture to deliver strategic vision
- Influence organizational processes, policies and systems to facilitate performance and change.

The way they accomplish these roles and how they might influence competitive advantage and industry evolution are summarised in Table 2-2 towards the end of this chapter.

Brand alliances facilitate value creation through leveraging the brand equity and identity of two or more brands, the nature of these alliances varying from the physical combination of brands within a product to co-branding (Cooke & Ryan, 2000; Ruekert & Rao, 1994). Ingredient branding is a B2B phenomenon whereby a supplier's product is clearly identified within the final product enabling the brand owner to build and maintain a relationship with buyers in non-adjacent links in the value chain[17] (Kotler & Pfoertsch, 2010). Kapferer (2008) opines that co-branding is symptomatic of a culture of partnership combined with the desire to maintain growth without investing in building new competencies. They enable firms to combine an under-utilized asset with complementary assets from another firm (Dyer & Singh, 1998; Gulati, Nohria, & Zaheer, 2000), can have a synergistic effect creating brand equity for both parties (Cooke & Ryan, 2000; Ruekert & Rao, 1994), and are likely to extract a higher premium for innovation (Rodrigue & Biswas, 2004). Where brands are franchised responsibility is diffused, creating co-dependence between franchisor and franchisee requiring an integrated and co-ordinated approach to brand management (Keller, 2000; Pitt, Napoli, & Van Der Merwe, 2003).

Raggio and Leone (2007, 2009) argue that firms chase the appropriable value of their brands[18] but resource constraints force them to emphasize either value creation or value capture. Thus

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Hemetsberger, 2008; Neal & Strauss, 2008; Noble, 2006; Normann, 2001; Olins, 2003; Power & Hauge, 2008; Pringle & Field, 2008; Raggio & Leone, 2007; Schultz, et al., 2000; Ulrich & Smallwood, 2007; Zyglidopoulos, Alessandri, & Alessandri, 2006.

[17] Examples of ingredient branding cited frequently in the literature are: Intel; Microsoft Windows; NutraSweet; Gortex; and Lycra

[18] Raggio and Leone define appropriable brand value as the *"theoretical maximum value that the brand could achieve if all brand equity was fully leveraged"*. (Raggio & Leone, 2009:2)

appropriable value depends on owner's strategic priorities. Companies can invest resources in building branding capability or position brands to sell to companies with higher estimates of appropriability or greater chasing capability (Raggio & Leone, 2009). Thus successful brands often change ownership through merger and acquisition or the market for line and corporate brands (Balmer & Gray, 2003; Casson & da Silva Lopes, 2010; M'Zungu, Merrilees, & Miller, 2010).

2.3 INDUSTRY EVOLUTION

To understand how brand may influence industry level change it is necessary to understand how industries change and how this has been studied. Industry evolution explores the evolutionary patterns that characterize the development of an industry over time (Winter, 2005). The initial structure of an industry is changed by evolutionary forces which must be understood in historic context (Porter, 1980; Winter, 2005). Within the strategy literature influential contributions to industry evolutionary understanding derive from Industrial Organization Economics (IO/E) (e.g.Porter, 1980, 1985), evolutionary economics (e.g. Malerba & Orsenigo, 1996; Winter, 2005), population ecology (e.g. Baum, 1996; Hannan & Freeman, 1977, 1989) and organization theory (e.g. Aldrich & Ruef, 2006) although here most empirical research has been conducted at the organizational level (Demers, 2008). Some argue that no single theory can capture the complexity of industry evolution and multi-modal approaches facilitate better understanding (e.g. Dosi & Malerba, 2002; Quinn & Leavy, 2005). Other scholars challenge single level research models and theories and the multi-level paradigm is now entrenched in management research. This reflects the fluid relationships between organizations and actors in business systems (Mathieu & Chen, 2011; Quinn & Murray, 2009), the nested levels of routines and processes (Salvato & Rerup, 2011) and the differential impact of industry and firm effects across sectors (McGahan & Porter, 1997).

Evolutionary economics reintroduced a historic component into the study of industry evolution neglected by dominance of IO/E, Transaction Cost Economics (TCE) and New Institutional Theory (NIT) all with *"a static and equilibrium flavour"* (Malerba & Orsenigo, 1996:53). It draws on the Darwinian metaphor (Hodgson, 1999, 2010), Schumpeterian assumptions of creative disruption and Nelson and Winter's (1982) work on routines rooted in the Carnegie School's model of organizational action (Murmann, Aldrich, Levinthal, & Winter, 2003). Routines are collective phenomena involving multiple actors which explain behavioural patterns as the truce between coalitions of individuals (Cyert & March, 1963/1992; Nelson & Winter, 1982). They are the primary means by which organizations accomplish much of what they do (Feldman & Pentland, 2003). Routines can be a source of inertia (Hannan & Freeman, 1984), flexibility and change (Cyert & March, 1963/1992) helping overcome cognitive problems by reducing complexity, minimizing cost, increasing managerial control and maximizing organizational legitimacy (Feldman & Pentland, 2003). Embedded in routines is the tacit knowledge (Polanyi, 1967) that underlies skilful job performance (Elliott & Yannopoulou, 2007).

Malerba and Orsenigo's (1996) seminal paper on industry evolution was written from an evolutionary economics perspective. Although this review takes a more holistic approach the questions and challenges posed remain relevant. These include: limited empirical case studies explaining the process of structural evolution over time; a need for wider definitions of industry boundaries; the role of institutions in industry evolution; and a need for theory to link industry evolution with firm level activity. They identified that the focus of industry evolution research was manufacturing industries defined as Quinn and Murray (2009) observe, by a narrow technological base. Despite the work of Jim Quinn and his colleagues (e.g. Hanchar, 2011; Quinn, 2002; Quinn & Leavy, 2002, 2005; Quinn & Sparks, 2007b) we still *"know little about the processes by which market structure evolves in non-manufacturing service industries"* (Fein, 1998:231). The structure of industries will be addressed below.

2.3.1 Porter - Structure and Power

Porter's contribution is important not only because it spans the intersection between the strategy and industry evolution literatures but because his early work had a particular interest in brand. The focus was long term differences in industries' economic returns. It explored consumer behaviour, interbrand choice and retailer power in relation to strategy and market power, factors generally ignored by IO/E (Porter, 1974, 1976). Existing theory emphasised the effect of advertising on performance through entry barriers and a given rate of advertising was assumed equally influential in every industry. Porter (1974) surmised that demand conditions had largely been ignored as had the consumer process of brand choice. He found that in some categories manufacturers could influence consumers through advertising and brand image, that consumer demand fundamentally impacts on industries' performance and that a strong brand image reduces retailers' bargaining power countering their power to refuse to stock products. Retailer store reputation, image and services contributed to product differentiation and retailer brand identity could be as important as product identity (Porter, 1974, 1976).

Porter's subsequent seminal contributions focus on B2B customers not consumers who he deemed individually exerted little power on industry structure. Building on IO/E Caves and Porter (1977) linked strategic groups to the mobility barriers which impede a firm's ability to move from one segment to another. As strategic groups are composed of firms or clusters of firms following similar strategies their existence exposes the heterogeneous structure within industries (Porter, 1979b). Porter's *Competitive Strategy* (1980) made some enduring contributions (Magretta, 2012; Spender & Kraaijenbrink, 2010). Firstly, the concept of extended rivalry through which customers, suppliers, potential entrants and substitutes in addition to intra-industry rivalry influence the firm's rent streams. This was encapsulated in his Five Forces Framework (FFF) (Porter, 1979a) which emphasised the importance of negotiating power and bargaining arrangements in market attractiveness. Industries are interrelated systems and structural changes are particularly significant

if they affect the underlying sources of industry power (Porter, 1980). Yet studies of how industry structures change configuration or how factors other than technological breakthrough stimulate such transitions are rare (Christensen, 2013). Secondly, Porter's three generic strategies (cost leadership, differentiation and focus) instructed managers how they could build sustainable competitive advantage. Thirdly, he identified fourteen dynamic industry evolution processes.

The popularity of the FFF puts it at the heart of the management agenda and few have attempted to develop the model (Grundy, 2006). Criticisms include: under emphasis on firm heterogeneity; omission of nonmarket forces (Baron, 1995); the role of complementors (Brandenburger & Nalebuff, 1995); oversimplification of value chains (Grundy, 2006); inability to explain dynamic change in industries (Dulčić, Gnjidić, & Alfirević, 2012) or collaborative relationships through alliances (Dyer & Singh, 1998). Porter (2008) defends against these 'sixth forces' asserting that it is a mistake to attribute visible attributes to underlying structure. The dynamism of the FFF and the impact on some 'sixth forces' is effectively explored in Chapter 8 of *Competitive Strategy* devoted to industry evolution (Porter, 1980). Amongst Porter's 14 processes are non-market forces such as government policy and exchange rate changes and market forces including marketing and process innovation, diffusion of proprietary knowledge and changes in buyer segment served. Empirical research supports the importance of non-market and market forces in industry evolution (e.g. Fransman, 2003; Hanchar, 2011; Quinn & Sparks, 2007b). Marketing scholars have used Pecotich, Hattie and Low's (1999) psychometric scale based on the FFF to measure industry structure and brand performance, indicating structural influences may help explain environment-firm impacts on brand performance (Weerawardena, O'Cass, & Julian, 2006) and that managers' perception of the intensity of the forces is important in strategy development (O'Cass & Ngo, 2007).

In *Competitive Advantage* Porter (1985) introduced the concept of value chains to explain how firms configure activities to create competitive advantage. His conception was an intra-firm construct linking primary and support activities within a firm culminating in overall margin. However value chains are also used to characterize activity flow across the multi-organizational level of analysis to produce a final good or service (Quinn & Murray, 2009)[19]. These industry value chains are characterised by vertical competition and cooperation between different levels of the chain. Porter observes that buyer's incomplete knowledge of suppliers could result in them inferring value from 'signals of value' such as advertising, reputation, supplier's employees, market share, and parent company and that advertising battles may enhance the level of product differentiation in the industry for the benefit of all firms (Porter, 1980). Brand reputation may be valuable to a buyer as it mitigates risk should the supplier not perform (Porter, 1985), similar to contemporary explanations of B2B brands. Overall Porter (1980, 1985) proposes that brand

[19] To avoid confusion the term 'internal value chain' will be used to describe the intra-firm construct and 'value chain' or 'industry value chain' to describe the inter-organizational chain. This is consistent with the use of the term in the marketing channels and emerging industry architecture literatures.

identity helps create a defendable position in an industry, acting as a barrier to entry and creating emotional and practical switching costs.

Gadiesh and Gilbert (1998) suggest profitable growth results from control of valuable sections of the industry's profit pool. Profit pools help explain an industry's underlying structure and the boundaries of its value chain prompting questions about industry boundaries and industry evolution (Gadiesh & Gilbert, 1998). Makadok and Ross (2013) differentiate industry structure from industry structuring, the ways firms individually or jointly affect industry structure. Brandenburger and Stuart's (1996) Value Net framework acknowledges the need for cooperation to foster market growth and competition to maximise market share. Value networks focus on the value-creating system where network relationships are essential to competitive positions, their structure impacting firm performance and industry evolution (Madhavan, Koka, & Prescott, 1998). Porac and Thomas (2002) adopt a cognitive approach to industry networks suggesting they evolve as a result of trading activities between producer and buyer communities.

2.3.1.1 Power and Dependence

Spender and Kraaijenbrink (2010) argue the FFF's implicit question is on protecting a firm's rent stream in a network of power relations. Power is central to understanding strategy (Carter, Clegg, & Kornberger, 2010) and industry evolution (Quinn & Leavy, 2005). Research of relationships along disaggregated value chains notes the importance of power and the incremental value that can be accrued by the sector, firm or brand customers perceive to guarantee the quality of the end product (Dedrick, et al., 2010; Duguid, 2010; Jacobides, et al., 2006). Power influences an organization's vertical and horizontal boundaries (Pfeffer & Salancik, 1978) an observation reflected in empirical studies (e.g. Dedrick, et al., 2010; Dedrick, Kraemer, & Linden, 2011; Mills, 1995; Quinn & Leavy, 2005). It is important in determining how organizations act in self-interest, conflict or cooperation (Mintzberg, Ahlstrand, & Lampel, 2009) and is the basis for resource dependency theory (RDT) which stresses the necessity of coping with problematic interdependencies and controlling resource flows (Pfeffer & Salancik, 1978). Child, Rodrigues and Tse (2012) differentiate between power and influence, the exercise of power through political action, asserting that the utilization of power depends on the ability of firms to mobilize and apply their sources of power. They distinguish between 'hard' and 'soft' power, the former being based on traditional sources of strength such as market share, brand equity or control of distribution channels whereas the latter relies on persuasion through indirect means using intangible resources to build legitimacy and trust (Yoffie & Kwak, 2006). Soft power is important in cooperative strategies (Gulati, 1998) such as alliances (e.g. collaborative advertising, licencing and technology transfer), strategic sourcing and co- opetitive relationships (Nalebuff & Brandenburger, 1997).

Considerations of power permeate marketing channels due to the interdependence of channel members (Coughlan, Anderson, Stern, & El-Ansary, 2006). They must co-operate to serve the end user despite each seeking to maximise profits (Rangan, 2006). Channel captains (Little, 1970) are equated with having the most power through which they force other members to implement their agenda (El-Ansary & Stern, 1972; Mayo & Richardson, 1998). Coughlan et al. (2006) observe that where power exists it tends to be utilized to reward or punish other channel members. Brand owners employ both hard e.g. Dell in the PC market (Duguid, 2010; Rangan, 2006) and soft power e.g. Apple with the music industry (Arthur, 2012) and leverage their relationship with consumers to shift the balance of power in their favour (Kornberger, 2010; Porter, 1980) contributing to evolution within the channel structure (Rangan, 2006).

The emergence of powerful retail brands plays a significant role in vertical channel competition. Historically the locus of power was the manufacturer whose brands were unchallenged as the guarantor of quality (Miskell, 2010). From the mid-1970s scholars researched the rising power of retail brands and the importance of countervailing power with the larger branded suppliers and original power with smaller suppliers (Burt, 2000; Burt & Sparks, 2003; Miskell, 2010) who became constrained in their ability to improve their market position unless they produced own brand (Oubiña, Rubio, & Yagüe, 2006). The limited research on this changing power relationship (Burt & Davies, 2010) acknowledges that large retailers are increasingly able to dictate trading terms (Miskell, 2010; Olins, 2003) and assume channel leadership (Burt & Davies, 2010; Burt & Sparks, 2003). Therefore the main 'enemy' to leading branded manufacturers' brands is no longer other horizontal brands but retailer brands (Kapferer, 2008; Miskell, 2010) prompting interest from industrial organization economists (Scott-Morton & Zettelmeyer, 2004). Retailer power is also derived through exploiting consumer relationships as retailers are physically and emotionally closer to consumers than manufacturers (Olins, 2000, 2003).

2.3.2 Innovation, Technology and Industry Lifecycles

One of the most influential dynamic models of industry change is the industry lifecycle (Klepper, 1997; Utterback & Abernathy, 1975; Utterback & Suárez, 1993) which emerged from economics despite being founded on marketing's product lifecycle (Cox, 1967; Levitt, 1965). It differs from ecological lifecycles (Baum, 1996; Carroll & Hannan, 2000) by its focus on demand conditions and the diffusion of technology throughout the industry. Porter's (1980) evolutionary processes suggest that innovation and the diffusion of proprietary knowledge are important drivers of industry evolution. Therefore it is germane to address the natures of innovation and technology plus the diffusion of technology and technology transfer before discussing industry lifecycles.

2.3.2.1 Innovation, Technology and Diffusion

Innovation processes are the sequence of events that unfold over time as new ideas are invented, developed and implemented within firms and across industries and communities. As such they are coevolutionary, relational, inter-temporal and cultural (Garud, Tuertscher, & Van de Ven, 2013). Both demand-pull and technology-push are crucial in the innovation process (Mowery & Rosenberg, 1979) and research suggests technological platforms may lie at the core of multi-party interactions (Gawer & Cusumano, 2002). As the skills required for innovation may not exist in one organization the process coevolves between the industry and its supporting institutions (Powell, 1998). Mechanisms for implementation of innovation across communities include industry standards and industry wide narratives that stabilize meaning which originate and circulate through multiple sources including the media and marcoms activities (Garud, et al., 2013).

The word technology is often confined to physical objects and the processes used to develop products, services and their delivery systems (Burgelman, Maidique, & Wheelwright, 1996; McKelvey, 1982). Some take a broader view defining it as knowledge (Spender, 1989) or the means by which societies cope with and transform their environment (Barfield, 1997; Calhoun, 2002). Arthur defines technology as *"an orchestration of phenomena for our use"* (2009:53). Physical technologies are not a source of sustainable advantage as they are reproducible unless protected by an intangible resource especially patents. But exploitation of technology can involve socially complex, inimitable processes resulting in differences in firm performance over time (Barney & Clark, 2007; Madhok, 2002). Social technologies enable the implementation or development of physical technologies with which they coevolve (Nelson, 2005; Nelson, Peterhansl, & Sampat, 2004). Implicit in this is a duality of the artifacts of technology and the thoughts and processes that achieve human objectives. These *"behavioural phenomena orchestrated for human purpose"* (Arthur, 2009:55) include firms' organizing technologies defined by the routines that transform inputs into outputs (Madhok, 2002).

Diffusion is the process by which *innovations* are *communicated* through certain channels over *time* among members of a *social system* (emphasis added), these four elements being universally identifiable (Rogers, 1962/2003). Technologies are adopted because they transform problems into those judged easier to handle (Spender, 1989). The rate of diffusion depends on demand-side factors (Malerba, 2007), the competitive environment, resource side factors and the nature of the industry itself (Lambkin & Day, 1989). It is communicated through populations heterogeneous in their willingness to change, particularly with respect to perceived risk of abandoning traditional technologies for the promise of new benefits (Granovetter, 1973; Moore, 2000; Rogers, 1962/2003). The technology adoption bell curve (see Figure 2-4) represents the differential rates of adoption, each segment differing in terms of people's motives to adopt or resist change (Moore,

2000; Rogers, 1962/2003)[20]. Early adopters and opinion leaders are agents in this process (Spender, 1989) with external experts playing a significant role (Nelson et al., 2004) often working alongside opinion leaders (Rogers, 1962/2003).

The process of technology transfer occurs when a technology is extended to new users within or across the boundaries of a firm or alliance (Mintzberg, et al. 2009). Differences in professional languages can be attenuated when technology moves from one discipline to another (Kogut & Zander, 1992). Leonard-Barton (1988) found successful technology transfer depended on mutual adaptation requiring higher-order organizing principles to codify technologies into a language accessible to a wider circle of individuals. Where technology transfers from one institutional environment to another multiple adaptations may be required as institutional forces determine the process' success (Munir, 2002). Boundary spanning individuals are pivotal in facilitating transfer (Kogut & Zander, 1992) through interaction with, or movement of, people between organizations (McKelvey, 1982).

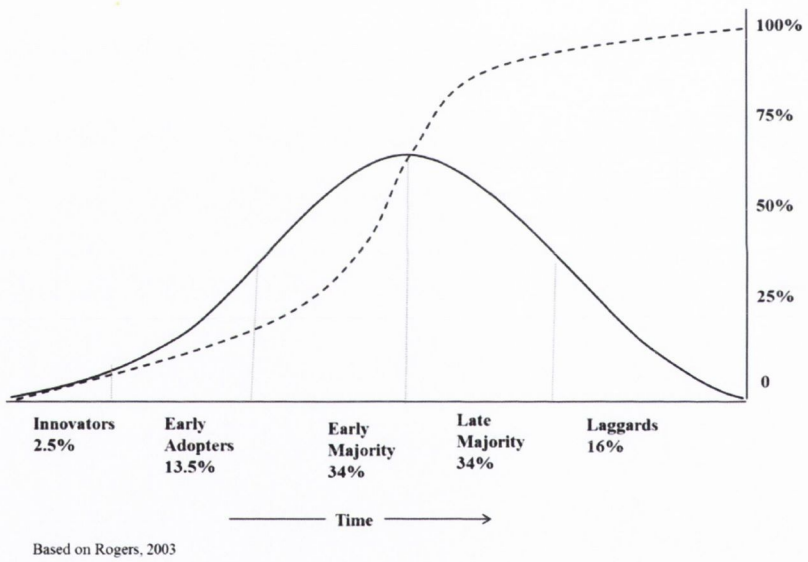


Figure 2-4 Technology Adoption Curve

2.3.2.2 The Industry Lifecycle

The industry lifecycle model proposes that four distinct stages track the progress of an industry over time, namely: fragmentation; shakeout; maturity and decline with some contemporary models incorporating a pre-entry stage (Malerba, 2007). Research has been conducted across a diverse range of industries (e.g. Horvath, Schivardi, & Woywode, 2001; Johnson & Kim, 2009; Klepper, 1997; Klepper & Simons, 2000; Windrum, 2005) and some patterns predicted have been observed, driven by learning, technological change, and the satisfaction of demand (Cohen, 2010). Empirical

[20] The marketing literature uses Roger's (1962/2003) terms innovators, early adopters, early majority, late majority and laggards to describe the different customer segments within the population. Moore (2000) uses terms more specific to technology diffusion namely technology enthusiasts, visionaries, pragmatists, conservatives and sceptics.

research suggests entrants to an industry are diverse at birth, with differences between diversifying incumbents and new entrants, and that pre-entry experience persistently affects performance (Bayus & Agarwal, 2007; Ganco & Agarwal, 2009; Helfat & Lieberman, 2002). Horvath et al. observe that *"industry shakeouts naturally follow periods of mass-entry by firms"* (2001:1023). The process of the birth and death of submarkets is used by Klepper and Thompson (2006) to build a model of industry evolution which explains various empirical regularities in firm growth and exit and also market share dynamics. Malerba (2007) acknowledges the importance of demand in industry lifecycles and how the characteristics of submarkets can affect the evolution of market structure. Windrum (2005) observed that more than one cycle of radical product and process innovation can occur across a lifecycle each resulting in a new round of market entry followed by industry shakeout with new innovative entrants displacing incumbents.

The industry lifecycle is the most empirically verified model of industry evolution but questions have been asked about its validity, generalisation and lack of a theoretical explanation (Baum & McGahan, 2004; McGahan, Argyres, & Baum, 2004; McGahan & Silverman, 2001). McGahan et al. (2004) observe that strategic management research tends to focus on phenomena within individual stages of the lifecycle and concern has been expressed with how lifecycle models deal with industry maturity and the emergence of a de-maturity phase (Abernathy & Clark, 1985; Quinn & Sparks, 2007b). McGahan (2000, 2004) challenges the ubiquity of one model to explain industry evolution as the nature of change varies between industries, industry boundaries are hard to identify and lifecycle models offer little help for adapting across generations.

2.3.3 Industry Boundaries

Although the concept of discrete, bounded industries composed of firms involved in a specific part of the production process are a common level of analysis (Brusoni, Jacobides & Prencipe, 2009) Christensen (2011) observes that this conception is too limited. Boundaries are porous and continually redrawn within multi-level systems while change in one element of industry structure tends to trigger changes in others and shift boundaries (Porter, 1980). Many products and services are created by networks of firms making it hard to determine the organizational boundaries (Afuah, 2003; Gadiesh & Gilbert, 1998) and the industry to which a brand might be ascribed (Mosmans & van de Vorst, 1998). A growing body of research has been conducted at the sector level (Luo, Baldwin, Whitney, & Magee, 2012). Sectors are coevolving systems of products and agents carrying out market and non-market interactions to create, produce and sell products (Malerba, 2002). They have been called value networks (Christensen & Rosenbloom, 1995), business systems (Quinn & Murray, 2009), and business ecosystems (Adner & Kapoor, 2010; Iansiti & Levien, 2004b). Sampler (1998) proposed that industry structure should be defined by boundaries of competition, concentration, diversification and innovation. At an organizational level Santos and Eisenhardt (2005, 2009) opine that boundaries should be set to maximize strategic control over

crucial external forces to avoid their being coerced (DiMaggio & Powell, 1983) into adopting activities suboptimal to organizational goals. They observed that power, specifically soft power, is the dominant logic for boundary foundation in nascent industries (2009).

Some suggest that the hegemony of efficiency debates, particularly TCE (Williamson, 1975, 1985, 1994), led to an atomistic framing of boundary debates around make or buy decisions, under-estimating considerations of inter-organizational power, capabilities, innovation and disruptive technologies. Over-emphasis on economic characteristics also downplays psychological and social dimensions of industry or strategic group membership (Porac, Thomas, & Baden-Fuller, 1989, 2011). Porac and Thomas (2002) observe that cognitive communities exist where managers' share beliefs about: the boundaries of competitive interactions (Porac, et al., 1995); industry recipes, industry level rule systems (Spender, 1989); and reputation orderings based on perceptual differences in performance. Shearman and Burrell's definition of industry employs a cognitive dimension stating industries are *"entities perceived by the core membership to belong to a given industry irrespective of their technological, product or market similarities"* (1987:327). In other words actors' cognition shapes their collective identity (Payne, 1990) and choice of boundaries (Dutton & Dukerich, 1991; Porac, et al., 1989, 2011). Actors' cognition is shaped by activities and artifacts that become commonly accepted and taken for granted (Porac & Thomas, 2002) which may include branding and brands.

Environmental change, rapid innovation and strategic alliances spanning industries blur boundaries making them permeable (Gassmann, Zeschky, Wolff, & Stahl, 2011; Zirpoli & Camuffo, 2009). This can result in new types of competitor (Moore, 1993, 1996) and waves of Schumpeterian creative destruction (Adner & Zemsky, 2005; Burgelman & Grove, 2007) such as the impact of the Internet on telecommunications (Fransman, 2003). Firms migrate across boundaries, their chance of survival being higher when there is a match between their pre-entry capabilities and those required in the new industry (Helfat & Lieberman, 2002; Qian, Agarwal, & Hoetker, 2012). Powerful brands stretch industry boundaries impacting its trajectory of change and acting as a boundary spanning device (Kornberger, 2010; Vandermerwe, 1996, 2014; Weerawardena, et al., 2006). Moon (2010) describes brands that best effect this as "*creative destructive*" brands.

2.3.4 Role of Institutions in Industry Evolution

Strategic management typically focuses more on the task than institutional context but institutions are more than a background condition, they determine and constrain the strategic options available (Oliver, 1997; Scott, 2005b), who profits from innovation (Teece, 1986) and strategic outcomes (Peng, Sunny Li, Pinkham, & Hao, 2009). Institutions such as government, public institutions, professions, regulatory agencies, and trade associations play a role in structural (Hanchar, 2011; Malerba & Orsenigo, 1996; Quinn, 2002; Quinn & McHugh, 2006) and architectural evolution

(Jacobides, 2008; Quinn & Murray, 2009). Conceived as *"the cognitive, normative and regulative structures and activities that provide stability and meaning to social behaviour"* (Scott, 1995:33) much of what is discussed in the literature as institutions are essentially social technologies (Langlois, 2003; Nelson & Sampat, 2001). Scott's (1995) cultural-cognitive pillar highlights the importance of shared understanding in institutions indicated by common beliefs and logic of action. Isomorphic forces drive institutionalisation and the basis of legitimacy is comprehension, recognition and cultural support reinforcing the similarity of social technologies and institutions.

There is surprisingly little research devoted to explaining how and why the institutional structure of an industry changes over time (Cacciatori & Jacobides, 2005). Cycles of de-institutionalization and re-institutionalization arise from environmental jolts (Oliver, 1992) and the subsequent cognitive legitimization of new institutional practices (Hinings, Greenwood, Reay, & Suddaby, 2004; Porac, et al., 1989). Mahoney and Thelen (2010) offer an alternative perspective by suggesting the importance of subtle, incremental, slow moving endogenous causal processes of institutional change. They posit that ambiguity in institutional rules provide critical openings for creativity and agency resulting in gradual change. Some contend that as large institutions collapse and new hierarchical structures emerge, each level of the new hierarchy offers possibilities for branding activity to impact on the re-emerging industry structure (Duguid, 2003, 2010; O'Cass & Ngo, 2007; Olins, 2003). Examples include the impact of branding by Intel and Microsoft Windows in the PC value chain (Casadesus-Masanell & Yoffie, 2007; Duguid, 2010; Jacobides, et al., 2006), the changing balance of power in the mobile telephone chain (Arthur, 2012; Isaacson, 2011; Tee & Gawer, 2009) and the growth of own brand in FMCG (Miskell, 2010).

2.3.5 Firm Level Theories and Industry Evolution

Brand creation and management are effected at the level of the firm. Developments in strategic management theory have the potential to address gaps between firm level activity and industry evolution. This section will explore dynamic capabilities (Teece & Pisano, 1994; Teece, et al., 1997), resource orchestration (Sirmon, et al., 2011), value-based strategy (Bowman & Ambrosini, 2000; Brandenburger & Stuart, 1996), and demand-based strategy (Priem, 2007; Priem, Butler, & Li, 2013)—all firm level theories underpinned by the resource-based approach.

Dynamic Capabilities

"Terminological anarchy" surrounds the term capabilities (Dosi, Nelson & Winter, 2000:3)[21] the high level routines that confer management with decision options for producing outputs (Winter,

[21] For example, the literature identifies: combinative capabilities (Kogut & Zander, 1992); managerial and functional capabilities (Fortune & Mitchell, 2012); organizational capabilities (Amit & Schoemaker, 1993; Madhok, 1996); operational capabilities (Helfat & Winter, 2011); core capabilities (Leonard-Barton, 1992); dynamic capabilities (Teece, et al., 1997); dynamic management capabilities (Adner & Helfat, 2003); and orchestration capabilities (Helfat, et al., 2007).

2003). Dynamic capabilities are *"the capacity of an organization to purposely create, extend, or modify its resource base"* (Helfat, et al., 2007:24) their disaggregate attributes being the capacity to sense and shape opportunities and threats, seize opportunities, and maintain competitiveness through enhancing, combining and reconfiguring tangible and intangible assets (Teece, 2009). The dynamic emphasis provides a focus on change processes in the context of a changing environment (Ambrosini, Bowman, & Collier, 2009; Teece, et al., 1997) similar to Adner and Helfat's (2003) dynamic management capabilities which incorporates asset orchestration. This is the assembling of assets to produce the differentiated and innovative goods and services customers want, necessitating an understanding of changing technology and customer needs. Strategy processes involve significant elements of intentional design and asset orchestration (Augier & Teece, 2008) in concert with the tacit routines by which managers alter their resource base (Eisenhardt & Martin, 2000). This emphasis on dynamics has broadened the appeal of resource-based strategy (Easterby-Smith, Lyles, & Peteraf, 2009) and resonates with the study of industry evolution.

Resource Orchestration

Resource management holds that it is the management of resources that makes them valuable (Sirmon, Hitt, & Ireland, 2007) thereby addressing the under-developed role of managers in the RBV (Priem, et al., 2013). Resource orchestration draws on this and asset orchestration to explore how managers affect resource-based competitive advantage (Sirmon, et al., 2011) shaping the outcome of strategy and avoiding being trapped by prior decisions (Augier & Teece, 2008). Sirmon and Hitt (2009; 2007) suggest that as industry boundaries blur in response to structural change industry recipes become less effective as heuristics to guide actions. But intangible assets including organizing technologies (Madhok, 2002) provide flexibility in adapting to change and creating performance differences thereby linking managerial intentionality with other evolutionary processes. They call for more work to explore its potential use in explaining firm's breadth (scope of the firm), depth (level of hierarchy) and lifecycle (level of maturity) (Sirmon, et al., 2011). The focus on lifecycle and growth suggests links between resource orchestration and industry evolution.

Value-Based Strategy

The value based literature makes a conceptual distinction between value creation and value capture; defining competitive advantage in terms of superior value creation and performance in terms of superior value capture (Peteraf & Barney, 2003). Value is conceptualized as perceived use value subjectively assessed by the customer, and exchange value, the price paid for the use value created (Bowman & Ambrosini, 2000). Willingness to pay is the maximum customers will pay for an offer reflecting the utility they derive from it (Brandenburger & Stuart, 1996) rather than market price which is influenced by bargaining power (Adner, 2004).

Value is created in a series of individual transactions along a chain of buyers and sellers (Brandenburger & Stuart, 1996) with value captured a function of the extent of value added plus the bargaining relationships between buyers and sellers (Bowman & Ambrosini, 2000; Chatain, 2011, 2013). The organization that creates value may capture it or it might slip to another level of the chain (Lepak, Smith, & Taylor, 2007) as other parties siphon off this value (Teece, 1986). Therefore the level of analysis is important. At the firm level value creation includes any activity that provides greater perceived novelty or benefits for which the target user is willing to pay, whilst isolating mechanisms, causal ambiguity and complementary assets including brand prevent competitors from replicating this property (Lepak, et al., 2007; Pisano & Teece, 2007). Firms must acquire value creation and appropriation capabilities to shape their competitive advantage (Mizik & Jacobson, 2003), brand processes and procedures forming part of the firm's embedded capital complementing separable capital assets to create and capture value (Bowman & Swart, 2007).

Demand-Based Strategy

Demand-based strategy observes that strategic management theories traditionally focus on value captured ignoring the influence of consumer behaviour and preference (Brief & Bazerman, 2003; Priem, 2007; Priem, Li, & Carr, 2012)[22]. It positions customer heterogeneity as essential to strategy (Makadok & Keil, 2013; Schmidt & Keil, 2013) looking downstream towards markets and consumers as sources of value creation (Adner, 2004) whilst retaining value capturing strategies (Priem, et al., 2012). Priem (2007) emphasized the relationship between strategy and the mechanisms that drive consumer willingness to pay stating that strategies must help consumers perceive incremental benefit and use value from innovations. Adner explored how demand heterogeneity presents an opportunity to reposition old technology in the demand environment (Adner, 2004; Adner & Snow, 2010). Makadok and Keil (2013) looked at the impact of product-market rivalry on customer preference and Ye, Priem and Alshwer (2012) link product diversification and customer utility showing how demand-side synergies create business value. Demand-based strategy draws on the importance of the symbolic use value of products (Ravasi, Rindova, & Dalpiaz, 2012) and Priem (2007) suggests that consumers receive unique benefits from the brand for which they are prepared to pay and which erect barriers to entry, while complex alliances like co-branding represent another way of enhancing consumption experiences.

2.3.6 Industry Architecture

The concepts of industry architectures is not new (see for example Gulati & Singh, 1998), but the seminal paper by Jacobides et al.(2006) catalysed a stream of research highlighting its central role in creating and appropriating value and its agency in industry evolution (e.g. Dietl, Royer, & Stratmann, 2009; Ferraro & Gurses, 2009; Jacobides & Winter, 2012; Tee & Gawer, 2009). It

[22] Malerba (2007) amongst others challenges this view. Yet it is interesting to note that the word 'consumer' is not found in the index of a number of key strategy texts including Mintzberg, et al., 2009 and de Wit & Meyer, 2010.

explores the rules and roles that shape inter-firm relationships across disaggregated value chains, usually emerging early on in an industry's life, shaping the industry, and becoming remarkably stable (Jacobides, et al., 2006). Activities taking part at one part of the value chain are understood to have profound effects on the profitability of other parts of the chain although the dynamic aspects of these shifts in profitability remain largely unexplored (Tae & Jacobides, 2011). Profit gravitates towards a set of firms engaged at one particular level and the competition of capabilities takes place not only at the market/segment level but also at the value chain level.

Three central concepts are particularly important with respect to this project. Firstly, the challenge of verifying and certifying quality reflected in the struggle to become the guarantor of quality of the final good produced by the chain. Secondly, that brand may facilitate market entry by providing a relational base to new entrants and substitute products. Thirdly, the ability to reap higher profits through creating an architectural advantage by the firm, or the level of the chain that serves as the guarantor of quality (Jacobides, et al., 2006), a position grounded in path dependency (Tae & Jacobides, 2011). Brand is explicitly linked to this role especially where there is risk of adulteration or opportunism (Duguid, 2003; Jacobides, et al., 2006). Architectural advantage is achieved through the complementarity and mobility of assets.

The architectural stream is important due to its integration of evolutionary and strategic management theories and because the dynamics of industry architecture help explain structural evolution. Firstly, it builds on work on inter-firm rivalry, value chains, bargaining power, vertical scope and the function of transaction costs, viewing the process of innovation from the level of the value chain (Cacciatori & Jacobides, 2005; Jacobides, 2008). Secondly, it explores the influence of differences in resources and capabilities on boundary decisions (Madhok, 1996) highlighting capacity restraints and the shaping of firm specialization (Jacobides, 2008; Jacobides & Winter, 2005). This links dynamic capabilities with the division of labour across the industry (Jacobides, 2006). Thirdly, it complements value creation and appropriation research (e.g. Dedrick, et al., 2010, 2011; Pisano & Teece, 2007; Teece, 1986) incorporating the formation and role of industry bottlenecks (Jacobides & Winter, 2005) and the emergence of kingpins and platforms (Iansiti & Levien, 2004a, 2004b; Tae & Jacobides, 2011; Tee & Gawer, 2009) the controlling influences that manage the flow of value across the business system (Adner & Kapoor, 2010; Kapoor & Lee, 2013). Fourthly, it makes explicit the institutional and industry evolutionary forces that shape the industry which impact on potential sources of architectural advantage for incumbents and new entrants (Ferraro & Gurses, 2009; Quinn & Murray, 2009). Despite its catholic roots industry architecture positions power as the underlying mechanism that apportions value over time.

Classic modern branding theories portray brands as *"weapons wielded by similar firms"* (Duguid, 2003:436). But there is also a brand war between complementary firms within the same value

chain (Bresnahan & Richards, 1999; Duguid, 2003, 2010). This impacts the allocation of power in the channel (Coughlan, et al., 2006; Duguid, 2010), the guarantor of quality accruing the most profit and gaining architectural advantage (Jacobides, et al., 2006). Brands can play a complementary role within the value chain. For transactions to occur both parties must find specialization outweighs the cost of trading (Jacobides & Winter, 2005) and if there is an asymmetry in branding capability or if branding is more important at a different level in the value chain, trading may be advantageous.

2.4 INTERSECTION AND GAPS IN THE LITERATURES

The overlap in the literatures outlined above might suggest a rich territory of commonality between the industry evolution, brand and strategy literatures. In reality the territory is small, particularly between brand and industry evolution where there is minimal empirical research beyond product brands in the business history domain. In the industry evolution literature product brands are used to explain brand's role in guaranteeing quality or disrupting adjacent industries, with limited evidence from other types of brand or within service industries. The brand literature suggests brands stretch industry boundaries (e.g. Moon, 2010) or act as a barrier to entry (e.g. de Chernatony & Dall'Olmo Riley, 1998) but fails to address the nature of industry boundaries or the mechanism by which brands stretch them. Finally, the brand literature observes the evolution of brand in concert with consumerism and brand management but fails to explain how brand evolves or what triggers its evolution, both important in understanding brand's nature.

Malerba and Orsenigo (1996) are not unusual in the industry evolution literature for their minimal mention of brands, referring primarily to advertising effects. This means that discussions of the differential effects of creativity, brand image and loyalty on the effectiveness of advertising or the industry-specific influence of advertising are largely overlooked (Porter, 1974). More recently history-friendly models of industry evolution incorporate advertising, bandwagon and brand effects inferring a relationship between brand and industry evolution (Malerba, 2007). Yet brand remains peripheral to subsequent studies. Malerba (2007) stresses the importance of demand conditions in diffusion of technology but the role of brand in creating this demand is not adequately addressed. Porter's earlier contributions (1974, 1976) could have catalysed a vibrant stream of research linking brand, competitive advantage and industry evolution but there is little evidence of this although marketing scholars have adopted the FFF as an analytic tool to explore competitive forces and brand (e.g. Pringle & Field, 2008; Weerawardena, et al., 2006).

The influence of organizational theorists and economists in brand scholarship emerged in concert with developments in more service orientated types of brand especially corporate brands. Where the corporate brand has been accepted as an important strategic asset and integral to overall strategic dialogue it has become a critical filter to factors previously deemed outside the scope of

brand's influence (Dunn & Davis, 2004). Links have been made between corporate brands and the RBV (e.g. Balmer, 2007; Barney & Stewart, 2000; Clegg, et al., 2011) while Mosley (2007) draws on the RBV to explain internal branding activity. Conversely, brand scholars argue that brands have been treated in a relatively superficial way in the RBV literature with little discussion about how they are created and maintained (Louro & Cunha, 2001; Urde, 1999). Brand is described as an intangible asset and a resource with little discussion about the significance of brand in creating and sustaining competitive advantage.

Perhaps one of the most exciting developments in industry level studies from a brand perspective is the work on industry architecture and architectural advantage sitting on the intersection between the three literatures. Many of the themes identified in Jacobides et al (2006) in their exposition of industry architecture have been explored by scholars in the eight years since it was published but little has emerged exploring the role of brand in architectural change. This stream of literature also lacks an explicit demand-side perspective essential to understanding the influence of brand.

2.5 CHANGE, EVOLUTION AND PROCESS THEORIES

This section of the chapter reviews the literature on how change comes about. It commences with the role of human agency and decision making, critical dimensions in explaining brand's influence on change. It then reviews theories of change with particular emphasis on evolutionary explanations. Change is defined as *"a difference in form, quality or state over time in an entity"* (Garud & Van de Ven, 2002:207) which Pettigrew (1985a, 1985b, 1987, 1990, 1997) argues is a multi-level process only fully understood in its wider context. Finally Section 2.5.3 outlines process research: a process being *"...a sequence of individual and collective events, actions and activities unfolding over time in context"* (Pettigrew, 1997:338). Processes rest on understanding people, space and time (Poole, 2004) where; 'people' is the role of agency, 'space' the scope of the system where change takes place and 'time' the temporal nature of the change.

2.5.1 Agency and Decision Making

Voluntarist theories of change attribute significant importance to agency while determinist theories see agency as having little influence (Demers, 2008). Yet, as managers do make choices and initiate actions, it is important to understand the underlying phenomena of strategic decision making and because managers are human, acknowledge that these phenomena help explain brand related decisions. The objective of strategic decisions is to change cognition and action to enable organizations to exploit opportunities or cope with environmental threats (Gioia & Chittipeddi, 1991). However, future events are unpredictable and human brains incapable of sensing and processing all available options, resulting in decision making being, at best, boundedly rational (Simon, 1957). In contrast to this rational choice option, creative or generative perspectives of decision making build on social and cognitive psychology. Karl Weick's (1969, 1979, 1995)

contribution is seminal to this stream. He introduced the term sensemaking to describe the process by which people construct shared meaning, serving as a spur or constraint to action (Weick, Sutcliffe, & Obstfeld, 2005). Gioia and Chittipeddi (1991) proposed a second process, sensegiving, through which senior managers communicate strategic decisions to their organization to influence how they construct meaning. In an exploration of the mechanics of internal branding Tarnovskaya and de Chernatony (2011) opine that sensemaking and sensegiving differ in their focus (inwards or outwards) and both processes give effect to employees' common understanding of their brand.

People use cognitive heuristics to reduce ambiguity when faced with problems or change (Olesen, 2014), acting as an interpretive filter and directing action through existing problem-solving responses (de Wit & Meyer, 2010), the routines of daily life (Giddens, 1984), industry recipes (Spender, 1989) and prevailing institutional norms. This can constrain change when it becomes institutionalized, embedded in individuals' minds or in organizational processes (Orlikowski & Gash, 1994). For Weick cognition and action are inseparable, action drives cognition as much as the other way around. Strategists may act first, interpret the outcomes, and then refine the action (Weick 1987 cf Hatch, 1997). Demers (2008) suggests that how change is framed by leadership is important in creating a sense of urgency or opposition through framing change as radical or routine.

Personal biases influence judgment and decision making (Kahneman, 2012) helping explain why consumer behaviour departs from rational choice assumptions. In a study of the Irish telecoms market Lunn (2013) found status quo bias to be a possible explanation for low switching behaviour, being a general defense against unintended consequences of change. An alternative explanation of status quo bias is that people follow the behaviours of those perceived to have greater knowledge and therefore small amounts of information can trigger convergent behaviours which may result in fads and fashions (Bikhchandani, Hirshleifer, & Welch, 1992). This explanation predicts a bias towards brands and suppliers with substantial market shares, a double jeopardy argument recognised in the brand literature (Ehrenberg, Goodhardt, & Barwise, 1990).

Entrepreneurs use symbolic communications, language and stories to convey their vision of the future (Aldrich & Ruef, 2006; Hatch & Schultz, 2003). Stories are abstract conceptual models (Pentland, 1999) which move people to action by making sense of the unfamiliar and reducing anxiety (Woodside, Sood, & Miller, 2008) thereby giving legitimacy and forming the currency of communication to the public (Lounsbury & Glynn, 2001). They also help create and disseminate industry belief systems and build cognitive communities (Porac & Thomas, 2002). Thus stories can be understood as process theories (Pentland, 1999) important for creating and sustaining brands through the use of language and symbols (Ind, 2007; Woodside, et al., 2008). In fact, brands are the most coherent form of storytelling (Kornberger, 2010).

2.5.2 The Nature and Theories of Change and Changing

To explain how industries change scholars have borrowed concepts and theories from other disciplines including evolutionary biology, ecology, and palaeontology (Abatecola, 2014; Van de Ven & Poole, 1995). Central to the different perspectives on the nature of change are the selection-adaptation debate and the difference of change versus the dynamics of changing, with ongoing debates between gradualist and the punctuated perspectives (Demers, 2008). Time sets a frame of reference for what change is seen and how it is explained (Pettigrew, 1987) with critical events, goals and milestones human constructions of how time is demarcated and against which change is measured (Poole, 2004).

Scholars have categorised theories of change based on different assumptions about the fundamental nature of change and the level at which it occurs. Meyer, Brooks and Goes (1990) classify change by their consequences, distinguishing between first order (small adjustments) and second order (paradigmatic) change. Their typology distinguishes between firm level and industry level change (see Figure 2-5 (a)). For example: logical incrementalism (Quinn, 1980) is a gradualist approach to first-order change at the level of the firm; punctuated equilibrium (Miller & Friesen, 1980; Tushman & Romanelli, 1985) is second-order change at the level of the industry. Evolution explains how industries undergo continuous change; and metamorphosis is frame-breaking organizational change.

Balogun and Hope Hailey (2001; 2008; 2002) propose four types of organizational change based on the nature of change, from realignment to transformation, and the speed of change, from incremental to big bang (or episodic) change (see Figure 2-5 (b)). Van de Ven and Poole (1995) suggest a four quadrant model based on the ability of managers to affect change (the mode of change) and the unit of change, from single to multiple entities (see Figure 2-5 (c)). Rooted in each quadrant is a motor of change: teology; lifecycle; dialectic; and evolution. They posit that any change model is incomplete as part of each model is exogenous and events from one model can remedy the incompleteness of another. They contend that some theories of change are built around dual, tri-, or quad-motors, based on the interplays amongst the generative mechanisms of change.

Teleological models celebrate human agency (Garud & Van de Ven, 2002) through a focus on managerial agency and goal setting and are highly voluntarist. They view change as a cycle of goal formation, implementation, evaluation and modification based on what was learned or intended, constrained by the environment and the organization's resources. Thus Child (1972) opined that

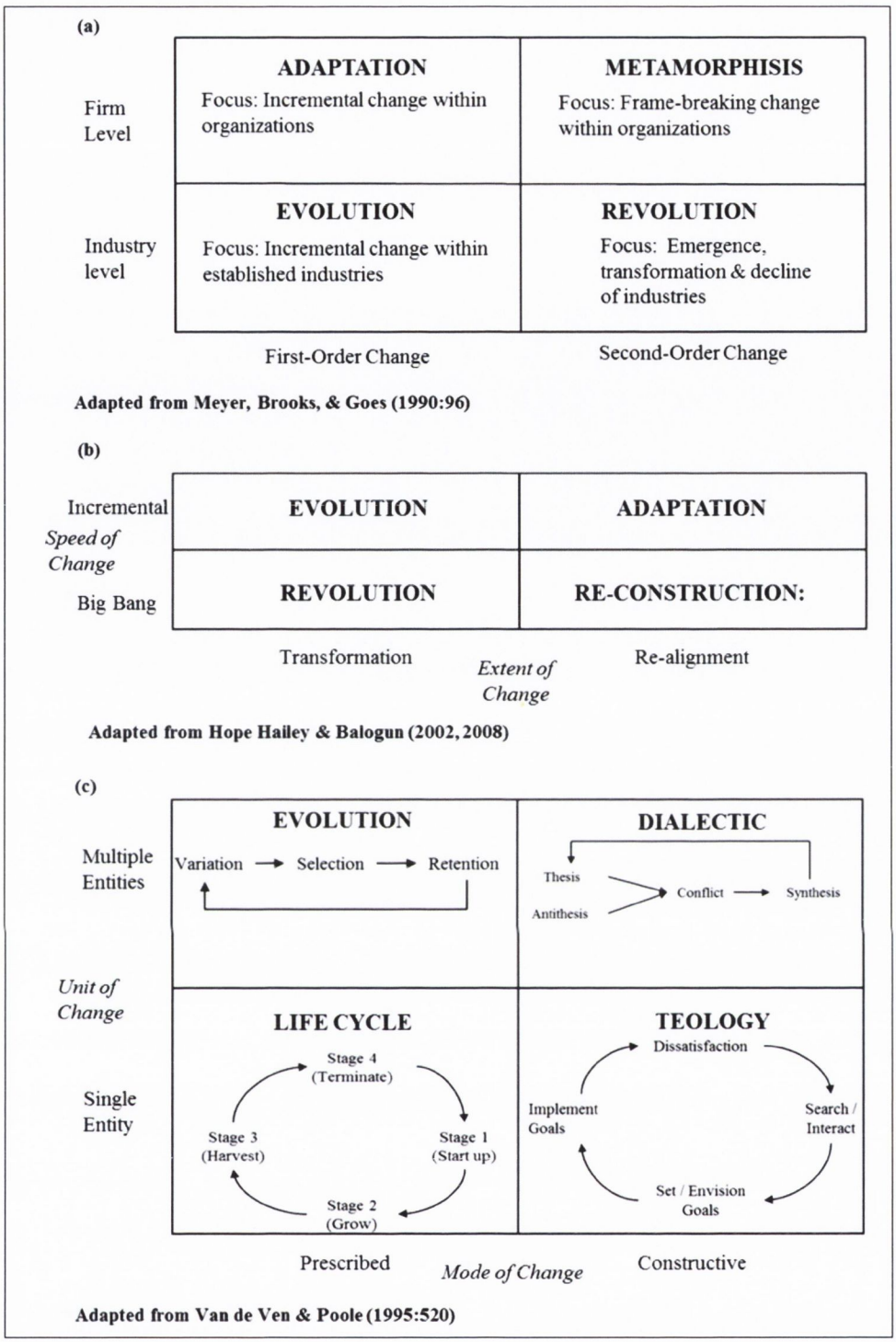


Figure 2-5 Theories of Change

managers are not prisoners of their environment but have the capacity to influence it such as by creating demand for their products. Unlike teleological change where the agency of managers and organizations is central, lifecycle models have relevance to industry level change and population is the level of analysis. Lifecycle theories are deterministic, assuming that change is imminent, the progression of change cumulative and that change occurs in a prescribed order (Van de Ven & Poole, 1995). Stages of growth theories such as the product lifecycle (Cox, 1967; Levitt, 1965),

industry lifecycle (Klepper, 1996, 1997) and Greiner's organizational development model (1998) are lifecycle with adaptation restricted to compliance at each stage.

Dialectic theories explain stability and change by reference to the relative balance of power between opposing entities assuming that organizations exist in a pluralistic world of colliding events, forces, or contradictory values that compete for domination and control (Van de Ven & Poole, 1995). Stability results from maintenance of the status quo between entities and change occurs when one gains sufficient power to overcome the status quo. Pettigrew's contextualist model (Pettigrew, 1985a) is dialectic as it is rooted in Gidden's (1984) structuration theory.

Evolution is an ambiguous term being used by some as a general term for change rather than a specific theory of change (Abatecola, 2014; Hodgson, 2013). Evolutionary change theories focus on the adoption of a biological analogy whereby change proceeds through repetitive cycles of variation, selection and retention (VSR) generated by competition for resources between entities inhabiting a population (Campbell, 1969 cf Aldrich & Ruef, 2006). It treats origin and persistence (continuity and change) as inseparable. Aldrich and Ruef (2006) posit that the evolutionary approach should be viewed as a metatheory of concatenated principles using multiple approaches to facilitate different levels of analysis and explain different types of change and therefore appropriate for interdisciplinary studies of change.

2.5.2.1 Evolutionary Approaches to Change

Two traditions (genealogical and ecological) coexist under the evolutionary umbrella. Genealogical is the evolution of skills and knowledge through the recombination of the old into the new (Demers, 2008), whereas ecological approaches are concerned with the selection of variations through competition (Baum & Singh, 1994). Variations are introduced through departures from routine, the intended or unintended consequence of action. They are the genesis of novelty, often resulting from technological innovations (Garud & Van de Ven, 2002) or environmental jolts (Meyer, et al., 1990). Selection logic drives evolutionary theorists (Murmann, et al., 2003), selection being the process through which variations are differentially selected or eliminated throughout populations to optimise environmental fit. Nelson and Winter (1982) propose that routines and competencies are the unit of selection. McKelvey (1982) notes that the distribution of dominant competencies depends on the survival of routines which are independent of organizations. Selection forces work on the expression of these routines/competencies and retention occurs when selected variations are preserved, duplicated or reproduced, so that selected activities are repeated or selected structures appear in future generations (Aldrich & Ruef, 2006). At the population level retention preserves collective technological and managerial competence that organizations use to exploit the resources of their environment.

Aldrich and Ruef (2006) adopt the term life-course to offset the deterministic and linear implications of the evolutionary approach and explicitly link it to research using social psychological and learning models of change acknowledging the evolving nature of the organization's environment which both precedes and will outlive it. Hodgson (2013) maintains that only a Darwinian framework can address complex population systems such as the origins of culture and human agency which other theories leave unexplained. There is limited evidence of an evolutionary approach being taken in studies of brand evolution. Studies are primarily descriptive and fail to explore the underlying mechanisms by which they evolve.

2.5.2.2 Coevolutionary Approaches to Change

Whereas studies of evolutionary change tend to focus on one population in an exogenous, mostly stable selection environment, coevolution (or concurrent development) acknowledges the processes of mutual adaptation within and across levels (Lewin & Volberda, 1999; McKelvey, 1997; Volberda & Lewin, 2003). Systems coevolve when they have a causal impact on each other's evolution (Murmann, 2003) and where there is ongoing positive feedback between the components of the evolving systems (Norgaard, 1994 cf Kallis, 2007). Defined as *"the joint outcome of managerial intentionality, environment, and institutional effects"* (Lewin & Volberda, 1999:526), coevolution bridges the gap between voluntarist and determinist perspectives of change, accepting that both prescient adaptation and ex post selection processes play a role in change (Murmann, 2013) facilitating multiple levels of analysis over time.

Baum and Singh's (1994) proposed a dual hierarchy for organizations with successive nested ecological and genealogical hierarchies. Entities neither operate independently of their adjacent levels nor expect that actions in other levels will not impact on them. Multi-level studies similarly indicate that higher-level variables are more likely to influence lower-level variables than the reverse, but during the emergence process of new phenomena bottom-up influences can be prominent especially where higher level phenomena have not crystallized (Kozlowski, Chao, Grand, Braun, & Kuljanin, 2013; Mathieu & Chen, 2011). Lovas and Ghoshal (2000) described the coevolution of human and social capital (genealogical entities) and strategic initiatives (ecological entities) conceiving strategy as 'guided evolution'. Durand (2006) built on the dual hierarchy to develop a theoretical model of evolution and strategic management apportioning a substantial role to agency in shaping the environment, facilitating an understanding of the relationship between competitive advantage, the survival of the firm and industry evolution.

Coevolution has emerged as a meta-concept to explain strategic management at different levels (Abatecola, 2014). Child, Rodrigues and Tse (2012) note the role of power in the relationship between an organization and the institutional environment; Quinn and Murray (2009) observe how evolution is constructed through coevolution between members of value chain communities;

Jacobides and Winter (2005) explored the coevolution of firm capabilities with transaction costs; Coff (2010) the coevolution of stakeholder bargaining power and capabilities; and Christensen (2011) how complementary convergence is a recurrent and important phenomenon in the evolution of industries. Although Townsend, Yeniyurt and Talay's (2009) used a coevolutionary framework to research the evolution of global brand architecture the literature contains very little evidence of coevolutionary studies of brand.

2.5.3 Process Research

Process research seeks to establish how firms' strategies emerge over time (Mellahi & Sminia, 2009). Theories within this stream are event-driven and enable the study of how and why change unfolds over time (Aldrich, 2001; Van de Ven & Engleman, 2004). It explores critical moments, turning points, activities and choices as well as the contextual influences and causal factors that influence the sequencing of events (Langley, 1999; Poole, 2004) enabling the exploration of conflicting forces and interactions across multiple levels of analysis (Langley, Smallman, Tsoukas, & Van De Ven, 2013), recognising the transience of a research object such as strategy (Sminia, 2009). Yet historically there were few studies that allowed the change process to reveal itself (Pettigrew, 1987). Process studies are underrepresented in premier management journals (Langley, et al., 2013) and the process of change remains one of the least understood aspects of how industries evolve (Malerba & Orsenigo, 1996).

In a review of the literature Sminia (2009) identified three dominant schools of process theory in the management domain. Configuration scholars view strategy as a response to external threats, opportunities and internal competencies (Mintzberg, 1990) suggesting realised strategy is formed by the convergence of deliberate and emergent strategies (Mintzberg & Waters, 1985). The contextualist school views process as a sequence of events involving both continuity and change arguing that research on change should explore the context, content and processes of change through time (Pettigrew, 1990). Sminia (2009) labels the third school 'Minnesota Studies'. Its theory emerged from research on the management of innovation (Van de Ven, 1986) evolving to encompass change and process in general. Implicit in the brand literature are many processes[23] with explanations of how they effect change drawn primarily from marketing and consumer behaviour. Organizational and resource-based theories have been used to explain brand related processes and change at the level of the firm (e.g. Clegg, et al., 2011; Hatch & Schultz, 2008; Kornberger, 2010) although this generally concerns corporate and internal rather than all forms of brand. Process theory appears not to have been used to explain how brands evolve, how brands contribute to value creation or competitive processes, nor how they impact on industry evolution.

[23] These include: commodity transformation; sensegiving; sensemaking; differentiation; rebranding; organizational change; communications; and brand evolution.

2.6 THEORETICAL FRAMEWORK

Having reviewed the intersection of the three core literatures and the nature of change, agency and process it is necessary to explore the foundational theories forming the theoretical framework for this study. The choice of theory must address the primary goal of the research, brand's influence on industry evolution. The literature suggests that brands fulfil the twelve roles identified in Section 2.2.3 and that branding is a firm level activity enacted in pursuit of competitive advantage. Extant theoretical explanations of structural and architectural evolution must be accommodated and the approach must be consistent with both evolutionary (Aldrich & Ruef, 2006) and coevolutionary (Lewin & Volberda, 1999) approaches to studying change. In this context five theories are identified as the most salient to explaining brand's influence on industry evolution.

Given the multi-level nature of this research this section is organised in line with Lewin et al. (2004). First resource-based theory, a firm level theory, underpinning emergent approaches to strategic management will be explored. Secondly two meso-level or boundary theories, Transaction Cost Economics and Resource Dependency Theory, will be explored. Both draw on organization theory, the first rooted in economics and the latter in sociology. Finally, two organization theories emanating from sociology and linking the firm to the macro-environment, New Institutional Theory and Population Ecology, will be reviewed. Table 2-1 summarises these foundational theories and their theoretical drivers of change.

2.6.1 Resource Based Theory (RBT)

RBT embraces a range of theories locating the source of competitive advantage in the resources a firm controls and how the firm structures, bundles and leverages them. Built on the work of Penrose (1959), it includes the RBV (Barney, 1991; Rumelt, 1984; Wernerfelt, 1984), theories based on intangible assets (Itami & Roehl, 1987), competencies (Hamel & Prahalad, 1994; Prahalad & Hamel, 1990), and capabilities (Amit & Schoemaker, 1993)[24]. The RBV holds that a resource must be simultaneously valuable, rare, imperfectly imitable and imperfectly substitutable (VRIN) to be a source of sustainable competitive advantage (Barney, 1991). Imitability rests on isolating mechanisms, path dependency, causal ambiguity and social complexity (Barney & Clark, 2007) and this complexity can result in their being only implicitly understood (Nelson & Winter, 1982) especially when part of a network of relationships between individuals and technology (Dierickx, Cool, & Barney, 1989). Resources that meet these criteria include culture, reputation, positions in inter-organizational networks, trust and the exploitation of physical technology (Barney & Stewart, 2000). Non-substitutability means competitors can neither duplicate nor substitute the offer.

[24] Grant (1991) notes the interchangeable use of the terms competence and capability in the literature.

Foundation Theory	Level	Disciplinary roots	Key premise	Driver of change	Principle Works
Resource Based Theory (RBT)	Firm Level	Economics / Strategic Management	The basis for sustainable competitive advantage is located in resources and capabilities and how the firm structures, bundles and leverages them	Competitive Advantage	(Barney, 1991; Grant, 1996; Penrose, 1959; Teece, et al., 1997)
Transaction Cost Economics (TCE)	Meso-level	Economics	Firms make decisions about activities in which they will engage by evaluating the total economic costs of an activity	Efficiencies	(Simon, 1957; Williamson, 1975, 1981, 1985)
Resource Dependency Theory (RDT)	Meso-level	Sociology / Political Science	Firms are constrained by external relationships, so managers act to reduce the power others have over them and increase their power over others	Exchange power	(Pfeffer, 1982; Pfeffer & Salancik, 1978)
New Institutional Theory (NIT)	Macro -level	Sociology	To survive, organizations must earn legitimacy by conforming to institutional pressures prevailing in the environment	Isomorphic forces	(DiMaggio & Powell, 1983; Selznick, 1996; Zucker, 1987).
Population Ecology (PE)	Macro -level	Sociology / Biology	Organizations emerge, evolve, and die in response to changes in the environment	Critical Events	(Carroll & Hannan, 1989; Hannan & Freeman, 1977)

Table 2-1 Foundation Theories

Resource orchestration, value based strategy, demand-based strategy and dynamic capabilities are part of the resource based paradigm[25] as is the knowledge based view which identifies knowledge, specifically tacit knowledge, as the source of superior performance (Eisenhardt & Santos, 2002; Grant, 1996). The RBV has a strong adaptive orientation, the level of analysis is the firm, and the unit of analysis the resource or capability (Lewin, et al., 2004). Criticisms of the RBV include the indeterminate nature of a valuable resource (e.g. Kraaijenbrink, Spender, & Groen, 2010; Priem & Butler, 2001) and difficulties in observing and measuring resources and capabilities directly (Reed & DeFillippi, 1990).

2.6.2 Transaction Cost Economics (TCE)

TCE is an organizational theory of exchange that predicts when a firm will undertake a task within its own hierarchy or leave the task to be performed by the market (Williamson, 1975, 1981, 1985). Its unit of analysis is the transaction and its conceptual parent *The Nature of the Firm* (Coase, 1937). Success is measured in terms of organizational efficiency through the minimization of transaction costs (Williamson, 1994). TCE focuses on explaining boundary decisions using the central elements of governance, the threat of opportunism, and transaction-specific investment

[25] All also draw on other roots, for example dynamic capabilities has roots in evolutionary economics, the Behavioural Theory of the Firm (Cyert & March, 1963/1992), TCE (Williamson, 1975, 1985) and capability lifecycles (Helfat & Peteraf, 2003).

(Barney, 1999). Although TCE approaches have been used primarily to explain vertical integration, they play a role in determining the distribution of the firm's activities over industries and how boundary decisions influence industry structure (Klein & Lien, 2009).

Transaction costs increase as a function of two paired conditions: bounded rationality confronted by heightened complexity and uncertainty; and opportunism coupled with a small number of exchange partners (Scott, 2008). TCE assumes bounded rationality; that people *"satisfice"* (Simon, 1957) to control search costs, making satisfactory rather than optimal decisions. Opportunism proposes that economic agents are self-interest seeking, act with guile and are thus not fully trustworthy (Williamson, 1993) although trust has functional substitutes (including brand) and frequent transactions build trust reducing transaction costs (Barney & Hansen, 1994; Dyer & Chu, 2003; Williamson, 1994). TCE assumes risk neutrality, an assumption for which there are *"virtually no empirical tests"* (Tsang, 2006:1007) and which is counterintuitive to the fundamental risk reducing element of brand. These psychological phenomena are the primary source of variation in a system and, when they reduce uncertainty, have a selective advantage (Aldrich & Ruef, 2006).

There is debate surrounding TCE's core assumptions, empirical validity and applicability (David & Han, 2004; Tsang, 2006) including its lack of social and institutional embeddedness and strong focus on rationality (Granovetter, 1985; Roberts & Greenwood, 1997). It is criticised for neglecting the dynamic aspects of transactions over time through use of static and cross sectional study designs (Lewin, et al., 2004). However, it has been combined with other base theories to form more evolutionary approaches such as dynamic capabilities (Teece, et al., 1997) and is integral to the industry architecture construct.

2.6.3 Resource Dependency Theory (RDT)

RDT's basic premise it that environment is a powerful constraint on organizational action and therefore firms seek to reduce uncertainty, maximise their control of critical resources and alter the balance of power in their favour (Pfeffer & Salancik, 1978). Decisions taken to avoid dependence can influence strategic change as managers navigate their environment and manage external constraints (Pfeffer, 1982). It adopts a political view of managerial motives and human nature asserting that managers must understand politics to deploy power effectively (Pfeffer & Salancik, 1978). Self-interest drives goals, decisions are not always rational, individual preferences are important, and the role of trust is acknowledged. Success is defined as organizations maximising their power and achieving a degree of influence over the resource environment or exchange partners to achieve stability (Oliver, 1991)

RDT has a strong adaptation focus. Managers are assumed to have an ability to influence power constellations in their favour (Lewin, et al., 2004) and develop linkages to important sources of

power (Scott, 2008). Actions taken to create and avoid dependence drives variation and selection is inherent in these asymmetric power relations (Aldrich & Ruef, 2006). Power-dependency thinking is at the core of Porter's FFF (Quinn & Leavy, 2005) and all aspects of marketing are attempts to manage dependencies through influencing customer demand (Hatch, 1997). Customers influence resource allocation decisions through the revenues they provide (Christensen & Bower, 1996) and market-orientated firms are able to reduce customer power through their ability to satisfy both extant and latent needs (Slater & Narver, 1998).

Although the basic tenets of RDT are well supported it has not experienced substantial theoretical development and there are criticisms of the theory. It has not been widely researched empirically in part due to the difficulty in operationalizing power differentials in relationships and ambiguities remain around boundary conditions (Hillman, Withers, & Collins, 2009; Lewin, et al., 2004). Finally, it has been criticised for a lack of discrimination between power imbalance and mutual dependence (Casciaro & Piskorski, 2005).

2.6.4 New Institutional Theory (NIT)

NIT emphasises how organizations become more alike, moving from one institutionally prescribed pattern of practices to another (Hinings, et al., 2004). Central to the theory are the concepts of legitimacy and legitimization of actions (Scott, 2008). As the environment changes, organizations are subject to coercive, normative and mimetic isomorphic pressures (DiMaggio & Powell, 1983)[26] resulting in adaptation due to institutional pressures for legitimacy rather than market pressures for efficiency (Greenwood & Hinings, 1996). This allows for the persistence of inefficient but legitimate, organizations (DiMaggio & Powell, 1983; Meyer & Rowan, 1977). Adoption of legitimated practices results in stability through isomorphism with the institutional environment increasing the probability of survival (Zucker, 1987).

One of the criticisms of NIT is its neglect of interest and agency which gives it little to say on change or about institutionalization as an unfinished process as opposed to an achieved state (Demers, 2008). Variation is treated as primarily exogenous, generated as organizations are forced to adapt to environmental change (Aldrich & Ruef, 2006). Reactions span a continuum of strategic responses from passive compliance to active defiance (Oliver, 1991) predicated on the relative power of the actors who steer this change including institutional carriers of change such as consultants and the business media (Powell, 2008). Mahoney and Thelen (2010) propose that institutions are above all else distributional instruments laden with power implications and one important source of change is shifts in the balance of power. Selection forces arise from the constraining role played by cultural elements such as symbols, myths, norms and rules within

[26] Coercive processes involve political pressures and the force of the state, providing regulatory oversight and control; normative processes stem from the potent influence of the professions and the role of education; and mimetic processes draw on habitual, taken-for-granted responses to circumstances of uncertainty.

organizational fields and societal sectors that give rise to a socially constructed arena in which diverse organizations carry out specialized functions (Scott, 2005b; Selznick, 1996). Participating in inter-organizational relationships allows firms to access formal and informal institutional resources such as laws and reputation thereby reducing uncertainty. Thus human behaviour in NIT is a socially constructed view of reality facilitating a constantly evolving conception of boundaries that may exhibit times of isomorphic stability (Hinings, et al., 2004).

There are questions around the ability to measure isomorphism. Isomorphic measurement studies have mostly been cross sectional measuring specific isomorphic pressures as outcomes while neglecting the process of institutionalisation. Measuring isomorphism as a process in longitudinal studies has been the exception rather than the rule and most studies have focused on single industries rather than comparing different patterns and causal mechanisms of institutionalization across industries (Lewin, et al., 2004).

2.6.5 Population Ecology (PE)

Population ecology (PE) seeks to explain change at the population level of analysis. Organizations are relatively powerless against the combined weight of competitors and other external forces (Aldrich & Ruef, 2006) and change arises from organizations failing to survive environmental change plus the birth of organizations better suited to the environment (Hannan & Freeman, 1989). It asserts the primacy of the selection environment with limited opportunity for adaptation by individual organizations and the general model of change is VSR with most variations being blind with regards to selection criteria (Demers, 2008).

Fundamental to the theory are the concepts of legitimacy and inertia. As populations grow its external cognitive legitimacy increases (Aldrich & Ruef, 2006), and is thus closely related to population density, the most important selection force. Structural inertia arising from organizational routines creating barriers to change thereby inhibiting fit with the changing environment and increasing the risk of failure over time. PE differentiates between generalist and specialist organizations, the former occupying the centre of the market and the latter exploiting peripheral niches and each responding differently to environmental change (Lewin, et al., 2004). Criticisms of PE include: its determinism and denial of managerial intentionality and free will; the problematic definition of fitness and operationalization of survival; the unsuitability of the theory to explain environments dominated by a few large organizations or powerful barriers to entry which compromise competitiveness in the population (Hatch, 1997).

2.6.6 Building a Theoretical Framework

Drawing on the various literatures reviewed throughout this chapter Table 2-2 integrates the foundation theories with the value creating and capturing roles deduced from the literature (see

Section 2.2.3) and suggests how these roles may help create competitive advantage and influence the process of industry evolution. However, this table should not be interpreted to suggest that the potential to create strategic advantage is an antecedent of industry evolution; these two columns are independent and related to the role of brand and the theories relate to the overall role's influence on industry evolution. It indicates that no single theory can explain all the phenomena identified, that theories may be overlapping and complementary suggesting a multi-modal and multi-level explanation for the role of brand in industry evolution. These five theories therefore serve as the theoretical framework with which to answer the research question.

2.7 REFLECTIONS ON THE LITERATURE

This literature review was built around the two interim questions emerging from the research rationale. It is appropriate to reflect on these literatures before moving on to the final research questions and exploratory framework. Section 2.2 sought to establish the nature of brand as a precursor to exploring its potential to influence industry evolution. It revealed that the concept lacks either an agreed definition or consensus as to its fundamental nature. The brand literature suggests that it is complex, multifaceted and evolving whilst within the industry evolution and strategy literature it is generally assumed rather than elucidated. The literature indicates that brand research has increasingly fragmented into specific types of brand rather than brand as a total construct. Furthermore, there is no cogent explanation for how or why brands evolve and limited longitudinal research into the agency of brand.

Brand is not central to the study of industry evolution although some scholars have addressed brand as an element of their research. Similarly the strategic management literature suggests that brand has agency in building and enacting business strategies. Therefore, whilst partial and fragmented, there is some evidence to support the thesis that brand plays a role in industry evolution but the mechanisms by which this is affected are unclear. Furthermore it appears that only a multi-modal and multi-level approach can explain brand's impact on value creation and appropriation at the firm and industry levels and across the value chain.

Role of Brand	Explanation of Role in Value Creation and Capture (Brand Literature)	Influence creating and sustaining competitive advantage (Strategic management literature)	Potential Impact on Process of Industry Evolution (Industry evolution literature)	Theory
Reduce perceived risk	Offset economic, social, psychological and experiential risks to customers.	Reduce buyer's perception of personal and organizational risk.	Mitigate opportunism. Reduce transaction costs.	TCE
	Represent a promise and build trust.	Creates loyalty and bias in customer base - emotional barriers to entry and exit.	Build legitimacy.	NIT
	Reduce fear of entering new product category (particularly high tech).	Ameliorate decision making process.	Accelerate diffusion of innovation.	TCE
Differentiate from competition	Creates unique rational and emotional associations.	Act as a heuristic for customer decision making. Attenuate search costs.	Influence customer demand.	RDT
	Facilitate customer segmentation & choice	Enhance level of product differentiation.	Create variation - act as catalyst for change.	RBT
	Justify price premium over products that fulfil a broadly similar purpose.	Create firm heterogeneity through VRIN resources and substitute offerings.	Transform product category (and trajectory of development).	RBT
	Act as a practical and emotional barrier to entry and exit.	Create barrier to entry through generating customer bias.	Stretch and shift perceptual boundaries of industry.	RDT
Communicate quality and value	Certify quality.	Capture incremental value.	Create architectural advantage through becoming guarantor of quality.	TCE
	Signal quality to customers, partners and competitors.	Create firm heterogeneity through building brand equity which is hard to imitate.	Accelerate trajectory of change.	RBT
	Make perceived quality concrete and memorable.	Reinforce strategic positioning in minds of all stakeholders, creating differentiation.	Manipulate exchange environment through influencing customer demand.	RDT
	Facilitate choice, including routine choice.	Reduce search costs.	Drive institutionalisation of industry.	NIT
	Facilitates cognitive processes making communications more readily accepted.	Make product differentiation meaningful.	Shift balance of power.	RDT
Act as interface between firm and customer	Reduce complexity and facilitate choice through brand recognition.	Mediate transaction relationship - create sense of trust and confidence.	Create efficiencies.	TCE
	Create sense of identity and belonging - builds communities.	Create emotional barrier to exit.	Create barrier to entry.	RDT
	Create sense of trust and confidence.	Legitimise positioning and corporate parent.	Build legitimacy.	NIT
	Represent the organization.	Leverage resources that build relationships.	Build dependencies and legitimacy.	RDT /NIT

Role of Brand	Explanation of Role in Value Creation and Capture	Influence creating and sustaining competitive advantage	Potential Impact on Process of Industry Evolution	Theory
Create efficiencies (economies of scale and scope)	Economize on marketing spend.	Optimise return on marketing investment.	Increase efficiency.	TCE
	Create internal efficiencies - focus for innovation and portfolio management.	Exploit imitable assets across multiple product categories and markets.	Facilitate cross boundary entry based on extant brand equity.	RDT
	Utilize underused assets - leverage past brand building activity.	Create efficiencies.	Inform 'make or buy' decisions - purchase of established brands vs. cost of creating brand.	TCE
	Leverage existing customer relationships.	Reduce cost of sales and distribution.	Increase efficiency.	TCE
	Optimize organizational form including vertical integration.	Catalyse change management. Maximise management of resources.	Facilitate outsourcing and vertical integration.	TCE
Shift balance of power within value creation chain	Generate customer pull. Influence buying decisions & motivate channel.	Impacts on industry structure and attractiveness.	Moderate exchange power throughout the value chain.	RDT
	Drive technical and product innovations through powerful relationships.	Increase power in distribution channel influencing purchasing and pricing policies.	Act as the primary guarantor of quality in value chain.	RDT
	Provide barriers to vertical competitors.	Increases value capture potential.	Creates architectural bottleneck.	RDT
	Shift demand curve through creating perceived need.	Entry requirement for industry participation.	Create isomorphic forces establishing new industry norms.	NIT
Generate and protect future revenues	Protect valuable resources.	Act as an isolating mechanism.	Reduce risk of imitators and substitutes.	RDT
	Encourage inward investment. Generate increased cash flows. Generate royalties.	Increase intangible asset base. Accelerate and reduce vulnerability of cash flows.	Reduce dependencies.	RDT
	Keep products and services relevant to changing tastes and needs.	Facilitate strategic decision making process - influence investment decisions.	Adapt to changes in the industry and environment.	RBT
	Capture value latent in acquired brand assets.	Respond to changing capability requirements in dynamic environment.	Leverage equity in brand to enter new market or act as substitute product.	RDT
	Diversify risk.	Facilitate innovation and diversification into new markets and new product groups.	Adapt and change knowledge and capability bases.	RBT
	Create loyalty bias in customer base.	Functional and emotional barriers to exit.	Create architectural bottlenecks.	RDT
	Increase value of company when sold.	Utilize tradable asset to generate cash and facilitate consolidation and diversification.	Adapt to changes in the industry and environment.	TCE

Role of Brand	Explanation of Role in Value Creation and Capture	Influence creating and sustaining competitive advantage	Potential Impact on Process of Industry Evolution	Theory
Assist growth and maintenance of company reputation	Signal relationship between product and the organization behind it.	Influence investment in reputation building activities such as CSR.	Legitimises organization.	NIT
	Builds trust - reassures that promises will be kept.	Proxy for contractual agreements facilitating stability and change.	Mitigate opportunism.	TCE
	Demonstrates long-term commitment to company strategy.	Encourages investment. Helps retain and attract talent.	Increases organizational fit with the environment.	NIT
Facilitate inter-firm collaboration and cooperation	Catalyst for cooperation - builds relationships.	Inform 'make or buy' decisions - purchase of established brands vs. cost of creating brand.	Mediate transaction relationship - create sense of trust and confidence.	TCE
	Facilitate outsourcing decisions.	Inform capability development decisions.	Steer power structure of firm and industry.	RDT
	Facilitates inter-company knowledge and capability transfer. e.g. brand alliances.	Leverages resources and capabilities of partners.	Shifts balance of power in industry architecture.	RDT
Legitimise corporate behaviour and activities.	Make business model evident.	Influence internal governance processes and investment decisions.	Create efficiencies by aligning policies with stakeholder values.	RBT
	Manage changing external environmental demands.	Steer power structure of firm.	Create institutional pressures for change.	NIT
	Humanise corporation - badge of ethical behaviour.	Influence values and behaviours to reflect societal norms.	Improve ability to survive by conforming to industry trends.	PE / NIT
	Legitimise corporate action and acts as a vehicle for CSR activity.	Create emotional bonds with customers and other stakeholders.	Improve ability to survive by demonstrating appropriate behaviour.	PE /NIT
Effect organizational culture to deliver strategic vision	Embody organizational memory - cultural capital for growth. Creates rituals.	Facilitate knowledge transfer, intra-company cooperation.	Improve efficiency.	TCE
	Facilitates HR and recruitment policies - provides identity, community and opportunities to employees.	Leverage identity and image - values, norms and cultural glue.	Adaptation through aligning policies with stakeholder values and facilitating organizational flexibility and change.	RBT
	Embody values of founders and leaders.	Distinctive culture - VRIN resource.	Creates differentiated customer experience, influencing customer demand.	RBT
	Align policies with stakeholder values.	Influence values and behaviours to reflect societal norms.	Improve ability to survive by conforming to industry trends.	NIT

Role of Brand	Explanation of Role in Value Creation and Capture	Influence creating and sustaining competitive advantage	Potential Impact on Process of Industry Evolution	Theory
Influence organizational processes, policies and systems to facilitate performance and change	Provides common ground and facilitates cross department cooperation.	Creates routines and influences decision rules.	Facilitates organizational evolution and fit with environment.	PE / NIT
	Intra-firm knowledge and capability transfer.	Develop brand based routines to help solve complex competitive problems.	Creates normative pressures within the industry.	NIT
	Build corporate structure and influences governance.	Drive organizational learning, build& retain intellectual capital & capabilities.	Steers power structure of firms within industry.	RDT
	Facilitates organizational flexibility and change, including after M&A activity.	Increases efficiencies within the organizations.	Stretches and blurs industry boundaries.	TCE

Table 2-2 Building a Theoretical Framework

2.8 RESEARCH QUESTION

This research was motivated by a desire to explore and understand the long-term impact of brands on industries. The literature review indicates a cursorily approach to brand in the strategy literature and how peripheral brand has been to studies of industry evolution. Thus a significant gap has been identified with respect to the way brand shapes industry change, or the process by which the agency of brand might affect this change. Thus the main research question remains:

- **How do brands influence industry evolution?**

To answer this question requires a clear definition of brand which is not found in the literature. Furthermore brand's ability to evolve may be essential in understanding its fundamental nature but the literature fails to explain how this comes about. Therefore a secondary question needs to be addressed as a precursor to the primary question. This is:

- **What is the nature of brand and how does it evolve?**

In answering the primary question a number of factors must be taken into account:

- the locus of brand creation and management is within organizations;
- brands only have agency through the values and associations they create in the minds of consumers;
- brands compete for market share with other brands complementing products and services serving similar customer needs;
- inter-firm relationships and dependencies impact on structural dynamics and architecture;
- all brand-based relationships and transactions occur within the institutional and task environment.

Therefore the collection and analysis of brand-related data at each level of the business system is necessary to build a picture of how brands influence industry level change.

2.9 EXPLORATORY FRAMEWORK

The exploratory framework used to guide this research is built around the conceptual model outlined in Pettigrew (1987), utilized by Quinn (2002) and Hanchar (2011) and illustrated in Figure 2-6. Within this framework 'inner context' refers to the task environment, 'outer context' the institutional environment, the effect of brand within the industry is described as 'agency of brand' and 'history' describes the unfolding path-dependent influences that help direct the course of evolution. The process of industry evolution refers to how change comes about within each industry as a result of the confluences of forces over time.

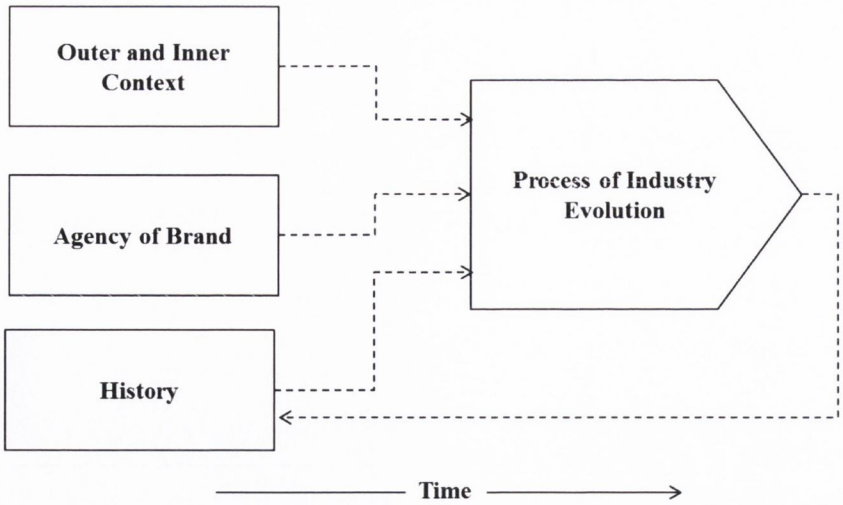


Figure 2-6 Conceptual Framework

A simple model such as this is appropriate for inductive research. However the literature review indicated the agency of brand is multi-faceted and the dynamic relationship between industry architecture and the industries' structural dynamics. Figure 2-7 modifies the conceptual framework to incorporate brand-related learnings derived from the literature. It makes explicit elements of the model as it relates to brand.

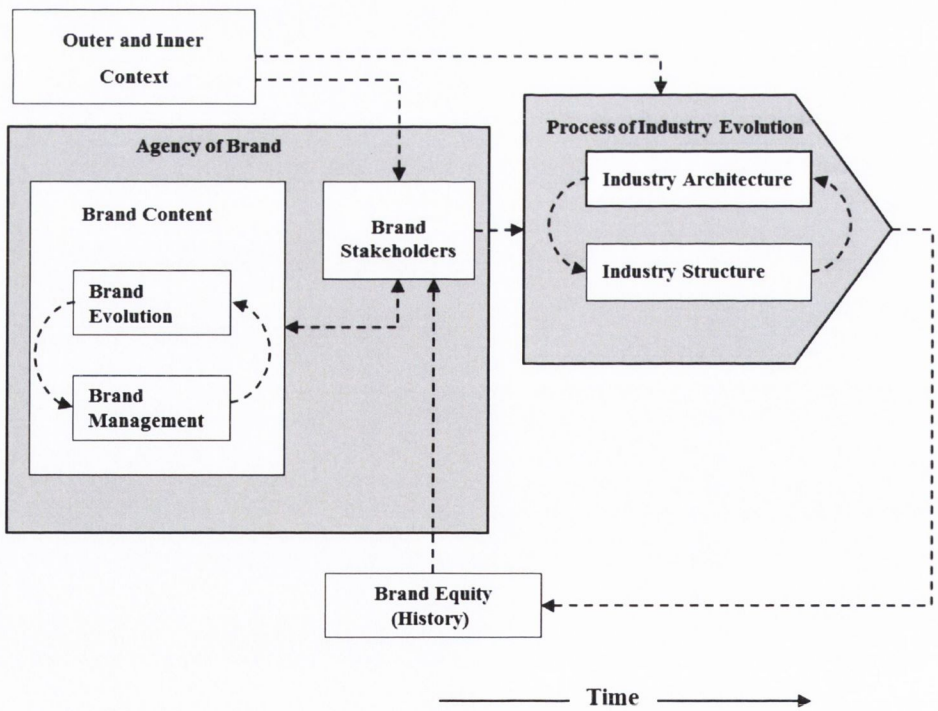


Figure 2-7 Exploratory Framework

Brand content pre-supposes that brands are present in the industry and the presence of competitors or substitutes which are a necessary condition of their existence. Brand and brand management are evolving constructs (de Chernatony, 2009) and brand content is the extant level of brand evolution

and brand management practice. Brand management includes all organization-based management activities relating to brand including brand-related strategic decision making including resource allocation by senior managers in addition to those of brand management teams. However, the primary focus in this research is on the strategic leadership of the firm and individuals responsible for brand strategy. Brand equity is the history of past brand building activity which has agency and value only through its influence on people. Brand exists through its relationship with the individuals who experience, create or benefit from it. Therefore brand stakeholders include customers and anyone else whose power and behaviour is moderated by brand e.g. employees, suppliers, partners, and shareholders. The agency of brand is a result of purposeful actions by management and other stakeholders and is performed only through stakeholder actions. Industry structure (or structural dynamics) and architecture are conceived as having a dynamic relationship and the process of industry evolution occurs within and impacts on the boundaries of the industry.

2.10 CONCLUSION

This chapter has reviewed and analysed the literature on brand and industry evolution, highlighting challenges and gaps existing in each and the lack of a theoretically-based overlap between them. With this in mind process and change theories were reviewed before exploring five foundational theories which form the basis of a theoretical framework. Finally the research questions and the exploratory framework forming the basis for the empirical research and analysis were introduced. The next stage is to explore the methodology and method used to answer the question posed.

CHAPTER 3 RESEARCH METHODOLOGY AND METHOD

3.1 INTRODUCTION

The purpose of this chapter is to present the methodological approach, the methods employed and the choices made in designing and executing this study. Central to these choices is internal consistency between elements of the project (Edmondson & McManus, 2007) including the experience, resources and philosophical assumptions of the researcher. Using a simplified version of Maxwell's (2009) model for a qualitative study (Figure 3-1) this introduction outlines the criteria that shaped the research design and why a qualitative contextualist approach is adopted.

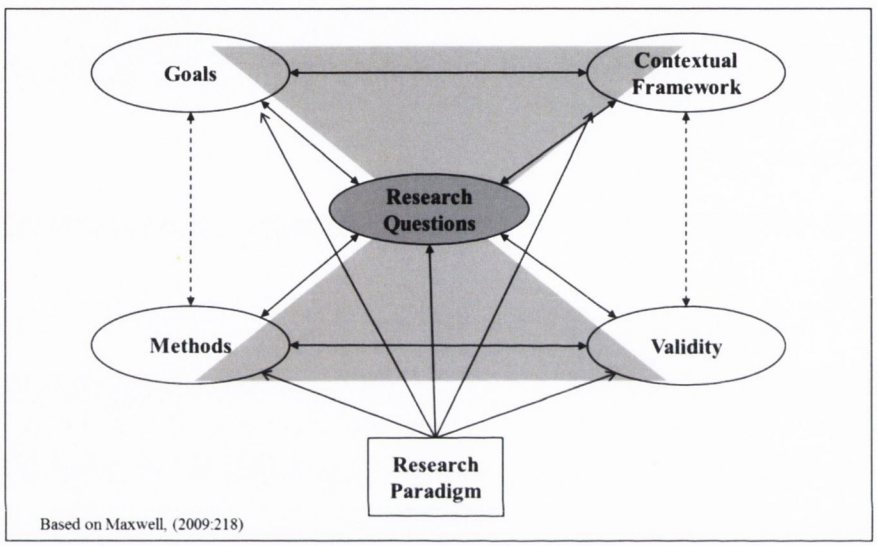


Figure 3-1 Building a Research Design

The model identifies five interactive design components essential to a coherent study. The upper triangle indicates the relationship between the study's personal, practical and intellectual goals (outlined in Chapter 1), what is known about the phenomena under investigation and existing theoretical frameworks and the research questions (Chapter 2). The research questions serve as the hub of the model. The lower triangle must also be integrated. The methods chosen must facilitate answering the primary and secondary questions and deal with plausible validity threats to the answers. Other relationships are marked by dotted lines. Thus existing theory and research have implications for validity and method is related to goals suggesting an exploratory, longitudinal, processual approach to study the influence of brand over time.

Mintzberg (1979:584) writes that *"It is discovery that attracts me to this business, not the checking out of what we think we already know"* consistent with the personal goals outlined in Chapter 1. It was evident from the literature review that there is considerable scope for inductive research to address the intellectual and practical goals and make a contribution. Maxwell (2009:218) outlines other factors which he describes as the *environment* within which the research design exists or the

products of research. These include the skills and experience of the researcher, available resources, ethical standards, the data collected and its analysis. These will be addressed throughout this chapter. But as experience in practice shaped the researcher's personal goals so too must understanding, theories and professional knowledge inform and influence the research process (Corbin & Strauss, 2008; Strauss & Corbin, 1990). Maxwell (2009:218) locates the research paradigm in the environment. The critical realist assumptions of this researcher influence each component of the research design and the choice of the qualitative, interpretive methods used are consistent with this research paradigm.

This study adopts a contextualist methodology identified by Sminia (2009) as one of the three dominant schools of process theory in the management domain. Specifically it follows the contextualist approach developed by the University of Warwick's Centre for Corporate Strategy and Change (CCSC) as outlined by Pettigrew (1985b, 1987, 1990, 2012). Pettigrew asserts that *"[T]he overriding intellectual purpose of my work has been to catch reality in flight"* (2012:1305). His longitudinal processual studies explore the dynamic qualities of human agency and conduct in the context of organizational settings and patterns of continuity and change that emerge over time.

In addition to the processual nature of change the literature identified the implications of multiple levels of analysis and fluid relationships between actors in business systems (Mathieu & Chen, 2011; Quinn & Murray, 2009). Furthermore, the review summated that no single theory can explain all brand related influences on industry evolution suggesting the use of a multi-modal approach. The CCSC contextualist approach is conducive to multi-level, multi-modal, longitudinal studies of change advocated by industry evolution scholars (Dosi & Malerba, 2002; Malerba & Orsenigo, 1996) and has been proven in use (Leavy & Wilson, 1994; Pettigrew, 1985a; Pettigrew & Whipp, 1991; Quinn & Leavy, 2005).

This chapter continues by exploring the choice of methodology and competing paradigms in social research. It then discusses contextualism as a theory of method, the comparative case study method and an overview of best practice approaches to implementing this method. Issues of reliability and validity credible in *qualitative* terms (Miles & Huberman, 1994:2) will also be addressed. The details of how the study was executed will then be outlined.

3.2 THE CHOICE OF METHODOLOGY

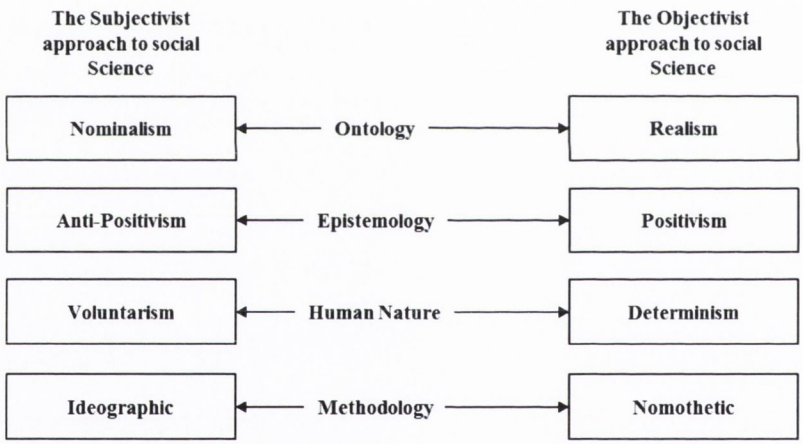
Contextualism is a philosophy of research and a theory of methodology ideally suited to the study of change. A distinctive style of conducting inductive, longitudinal comparative case studies emerged from the pioneering work of the CCSC (Pettigrew, 1985a, 1985b, 1990, 1997). Methodologist Mjøset (2009) describes the operation of the contextualist methodology as starting with a problem, selecting a process towards an outcome, and defining a context within which it

takes place. It is explained by tracing the process within the context over time. The approach is predominantly qualitative although quantitative data can be used in building case studies. The methodology adopts inductive reasoning to develop theories about the causes of change.

Mjøset (2009) argues that the methodologies of social science are determined 'from above' by the philosophical orientation and 'from below' by the research methods. Guba and Lincoln (1994) contend that questions of method are secondary to questions of paradigm which guide the researcher in ontologically and epistemological ways. With this in mind the next section looks 'upwards' to the competing paradigms of social science.

3.3 COMPETING PARADIGMS IN SOCIAL RESEARCH

Paradigms are a set of philosophical assumptions about the social world and how it is studied. Burrell and Morgan (1979) suggest that all social science research can be placed on a continuum from the subjectivist to the objectivist positions with respect to their ontology, epistemology and perception of human nature (see Figure 3-2). Overall the inquiry paradigm defines for inquirers what falls within and outside the limits of legitimate inquiry (Guba & Lincoln, 1994).



Burrell and Morgan, (1979:3)

Figure 3-2 The Subjectivist - Objectivist Dimension

Ontology is philosophical assumptions about the nature of reality the: nominalism-realism debate (Burrell & Morgan, 1979). Realism starts from the position that the social world exists independently of the researcher's consciousness whereas nominalism views reality as being constructed through human interactions and rituals. A researcher's ontological assumptions will impact on all aspects of their research including how they formulate the research question and their strategies for conducting the research (Nagy Hesse-Biber & Leavy, 2011).

Burrell and Morgan (1979:1) state that all researchers make implicit or explicit epistemological assumptions about the way the social world is studied and communicated which they term "*assumptions about the grounds of knowledge*". Epistemological assumptions are constrained by a researcher's ontological position (Guba & Lincoln, 1994) and fall along a continuum from positivists to postpositivists. Positivists view the reality studied as real and apprehendable, existing on its own regardless of the researcher's awareness or comprehension of it. At the subjective extreme of the continuum is constructivism where realities are no longer 'real' but are intangible mental constructions based on social experience (Guba & Lincoln, 1994). A third set of assumptions concerns the relationships between human beings and their environment, the voluntarist-determinist debate, briefly addressed in Section 2.5.

Methodology is a bridge between philosophical standpoints (ontology and epistemology) and how knowledge is produced (Nagy Hesse-Biber & Leavy, 2011). It is constrained by philosophical assumptions and may vary from ideographic to nomothetic in relation to the objective-subjective continuum (Burrell & Morgan, 1979). From 'below' (Mjøset, 2009) the acceptance of a particular epistemology usually leads researchers to adopt methods that are characteristic of that position (Easterby-Smith, Thorpe, & Jackson, 2008). The subjectivist approach assumes the social world can be understood by obtaining first-hand knowledge of the subject under investigation. It emphasizes *"letting one's subject unfold its nature and characteristics during the process of investigation"* (Burrell & Morgan, 1979:6). Objectivist methodologies involve the construction of scientific tests and the use of quantitative techniques. This hypothetico-deductive approach has long been the predominant approach to social research with method being fitted to predetermined methodologies. Mintzberg (1979:583) expressed a belief that research had *"paid dearly for the obsession with rigor in the choice of methodology"*, where too often findings had been *"significant only in the statistical sense of the word"*.

Guba and Lincoln (1994) suggest that questions of ontology, epistemology and method serve as a focus for the analysis of four inquiry paradigms: positivism; postpositivism; critical theory; and constructivism. The basic beliefs of these inquiry paradigms are presented in Table 3-1. Given the complexities of ontology and epistemology it is unsurprising that there is a multitude of approaches to social science research. However Miles and Hubberman (1994:5) note that *"...all of us—realists, interpretivists and critical theorists—are closer to the center, with multiple overlaps"*. They add that the *"paradigms for conducting social research are shifting beneath our feet"* with more researchers seeing the world through pragmatic and ecumenical eyes.

Item	Positivism	Postpositivism	Critical Theory	Constructivism
Ontology	Naïve realism– 'Real' reality but apprehendable	Critical realism— 'Real' reality but only imperfectly and probabilistically apprehendable	Historical realism—Virtual reality shaped by social, political, cultural, economic, ethnic, and gender values crystallised over time	Relativism– Local and specific constructed realities
Epistemology	Dualist/objectivist. Findings true	Modified dualist/objectivist. Critical tradition / community. Findings probably true	Transactional/ subjectivist. Value-mediated findings	Transactional /subjectivist. Created findings
Methodology	Experimental / manipulative. Verification of hypothesis. Chiefly quantitative methods	Modified experimental / manipulative. Critical multiplism. Falsification of hypothesis. May include qualitative methods	Dialogic/dialectical	Hermeneutical /dialectical

Table 3-1 Basic Beliefs (Metaphysics) of Alternative Inquiry Paradigms

3.3.1 Critical Realism

This research adopts a critical realist perspective. The philosophy of critical realism is associated with the work of Roy Bhaskar who labelled this *transcendental* realism in opposition to empirical realism (Bhaskar, 1975/2008). Transcendental realism takes the position that in order for scientific inquiry to take place the object under investigation must have real mechanisms that can be actualized to create outcomes. Mechanisms are the causal structures that explain a phenomenon, and critical realism uses causal language to describe the world. Unlike constructivists realists believe that the reality they are constructing exists independently of this construction and that social scientists can hope to achieve better understanding of organizational reality (Mir & Watson, 2001). Critical realism seeks to transcend traditional dichotomies in the social sciences claiming "*to be able to combine and reconcile ontological realism, epistemological relativism and judgemental rationality*" (Archer, Bhaskar, Collier, Lawson, & Norrie, 1998:xi).

Critical realists see the world as structured, differentiated and changing (Bhaskar, 1975/2008; Archer et al., 1998). Processes, events and structures are seen as different strata of a social reality with different properties. Distinction is drawn between three primary strata of reality: the Real, the Actual, and the Empirical. The Real is the domain of the underlying mechanism of structures that are responsible for what can be observed but is not directly observable. The Actual is the domain of events and processes caused by the mechanisms in the Real. The Empirical is where

observations are made and experienced by observers, where events in the Real and the Actual break through and speculations can be made about the Real (Danermark, Ekstrom, Jakobsen, & Karlsson, 2002). Social processes and events are explained in terms of the causal powers generated by both structure and human agency and the contingency of their effects (Sayer, 1992).

Critical realism does not aim to develop a specific method but offers guidelines for research and starting points for the evaluation of established methods (Danermark, et al, 2002). Proponents believe it has an important role to play researching strategy (Tsang, 2006; Tsang & Kwan, 1999), management and organization studies (Ackroyd & Fleetwood, 2000). Furthermore, critical realism is 'critical' because it acknowledges that researchers' data, description and explanations are fallible, cannot be justified in an absolute sense and are always open to critique (Maxwell, 1992; Scott, 2005a). Research is a process of conceptual improvement with the possibility that latent mechanisms may exist which are neither activated nor perceived.

Critical realists differ from other schools of thought in how they conduct the process of research. In addition to induction and deduction realists use two additional forms of inference, abduction and deduction (Danermark, et al, 2002). These are addressed below.

3.3.2 Forms of Inference

Induction and deduction are often portrayed as mutually exclusive but in reality the issue is more one of emphasis than dichotomy. Where there is limited theoretical knowledge concerning a phenomenon, as in this study, an inductive research strategy can be a valuable starting point (Siggelkow, 2007). Few researchers enter the field *"with an empty head waiting for it to be filled with the evidence"* (Pettigrew, 1997:339) and most inductive researchers recognise that it is neither possible nor desirable to go into the field without conceptual reference points. Even contemporary grounded theorists advocate the use of the literature to propose preliminary theories or constructs to focus the research protocol (Charmaz, 2006; Gasson, 2004; Strauss & Corbin, 1998). Leavy (1994) observes that in data-led qualitative research the literature and the data are interleaved, the researcher interacting with both in a process of internal dialogue. Some see the role of this initial immersion as conceptual sensitisation (Glaser & Strauss, 1967; Strauss & Corbin, 1998). Reading for ideas sensitises the researcher to what may be discovered in the field. However researchers must try to avoid premature categorisation as *"preordained theoretical perspectives may bias and limit findings*" (Eisenhardt, 1989:536).

Mintzberg (1979:584) suggests that if discovery is the goal of the research then it should be *"as purely inductive as possible"*. The first part of inductive research is the *"detective work"* following one lead to another to uncover patterns and consistencies. He prescribes *"peripheral vision"* and *"poking around in relevant places"* (1979:585). Rigorous case studies are suited to

detection as the feature of any case is *"to isolate sequences of events towards an outcome"* (Mjøset, 2009:46). The second step of induction is the 'creative leap' which involves generalizing beyond the data (Mintzberg, 1979). Similarly Klag and Langley (2013) observe that a 'conceptual leap' is a mysterious phenomenon in qualitative research where conceptual insight is expected to 'emerge' from data. It bridges the gap between empirical data and the world of ideas, 'seeing' new ways of making sense of some aspect of the social world and 'articulating' them through writing or visualization. As Mintzberg (1979:585) observes it requires a *"good dose of creativity"*.

Critical realist research facilitates creativity through its requirement for abductive reasoning. Abduction involves redescription and recontextualisation to enable novel understanding of a phenomenon within a particular conceptual framework (Danermark, et al, 2002). It builds on creativity and imagination and the ability to form associations and discern relations and connections that are not evident or obvious and think about phenomena in a different context (Danermark, et al, 2002:93). Retroduction is about moving from the empirical observation of events to postulating and identifying the mechanisms that are capable of producing them (Sayer, 1992). It asks *"what must be true in order to make this event possible?"* (Easton, 2010) and requires the ability to think in the abstract (Danermark, et al, 2002). This may be of particular relevance in determining the nature of brand.

An additional dimension to inductive analysis is the experience of the researcher. Their personal and professional background *"affects what the researcher can see: experience acts as both a sensitizer and a filter for researchers"* (Easterby-Smith, et al., 2008:117). They are sensitive to how things work within the field and why and what is likely to occur under certain conditions (Strauss & Corbin, 1990). Professional sensitisation played an important role in this study.

3.3.3 Qualitative versus Quantitative Research

This section will explore the dichotomy between qualitative and quantitative orientations before looking in more depth at the qualitative research. The essence of qualitative research is based on the ontological assumption that reality is subjective and socially constructed. This contrasts with quantitative research which assumes an objective and independent reality (Guba & Lincoln, 1994). While several authors engage in vehement opposition to the 'other side' referring to the 'paradigm war' between 'quans' and 'quants' (Kohlbacher, 2006), other writers observe that the contrast is no longer useful or even false (Bryman & Bell, 2007). There is however an important surface distinction—qualitative research methods primarily collect data in the form of words and quantitative data is in the form of numbers (Easterby-Smith, et al., 2008). Quantitative research typically has incorporated the practices and norms of the natural sciences and is oriented towards the testing of theories (Bryman & Bell, 2007). Qualitative research emerged in the humanities and social sciences and is orientated towards discovery and building theories. There is a move towards

using the method most appropriate to the phenomenon under investigation, adopting a problem centric approach where the research question drives methodological decisions (Nagy Hesse-Biber & Leavy, 2011).

Critical realist sociologist Sayer distinguishes between extensive and intensive research (1992, 2000). Extensive research examines a wide range of data and is hence quantitative whereas intensive research examines a topic in great depth and therefore qualitative. These strategies have complementary strengths and weaknesses but Sayer argues that on pragmatic grounds a single piece of research should make a choice. The decision to choose qualitative research for this project was made on the basis of best fit.

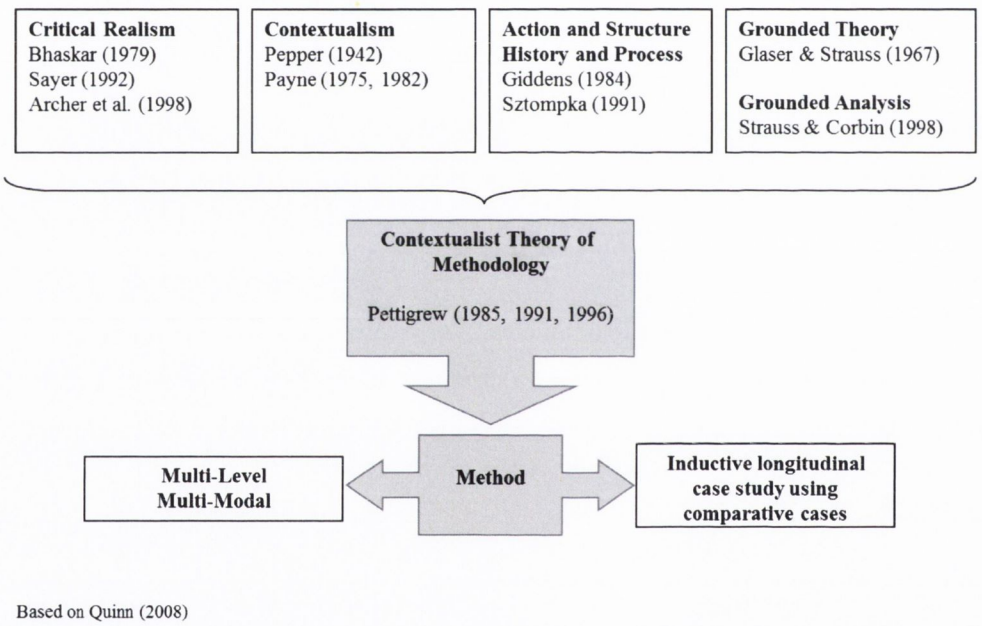
Qualitative research is appropriate when theory is nascent allowing for open ended data to be collected and interpreted for meaning (Edmondson & McManus, 2007). It allows for the investigation of *"naturally occurring, ordinary events in natural settings"* and the gathering of rich and holistic data which can reveal complexity and provide vivid descriptions which strongly impact the reader (Miles & Huberman, 1994:10). But it is labour intensive, imposes risks of data overload and researcher bias, is time intensive and presents issues around the adequacy of sampling and the quality of conclusions drawn (Miles & Huberman, 1994). Longitudinal data describes circumstances and events over a series of time points contrasting with cross-sectional data which records research units at one point in time. Qualitative data enables the chronological flow to be preserved, showing relationships between events and their consequences. It can produce serendipitous findings and new integrations which generate or revise conceptual frameworks (Miles & Huberman, 1994). In addition qualitative methodology is appropriate in building theory (Eisenhardt, 1989) or making a theoretical contribution (Whetten, 1989).

3.4 CONTEXTUALISM

Contextualism is rooted in the ideas of Pepper (1942). He identified four world hypotheses, the others being formism, organicism and mechanisism. Contextualism is based on pragmatism as a philosophy, the historic event as a root metaphor, its epistemology base being clarified by Payne (1975, 1982 cf Pettigrew, 1985b). It views the world as a collection of events in unique settings relying on structuration-like theories to provide recurrent patterns in the change process under review (Sminia, 2009). In the study of change the contextualist perspective is close to the 'ensemble des jeux' perspective of Crozier and Friedberg (1980) on actors and systems, Gidden's structuration theory (1984) and Sztompka's (1991) theory of social becoming due to its emphasis on the reflexive and recursive nature of the relationship between context and social action. Context is seen to both enable and constrain social action while social action is seen to shape and be shaped by context. The driving assumption behind the process thinking in contextualist research is that social reality is a dynamic process (Pettigrew, 1997), it occurs rather than merely exists

(Sztompka, 1991) and focuses on changing rather than change. While traditionally associated with qualitative methods it can be used with quantitative methods (Mjøset, 2009).

The principal author in contextualist process research is Andrew Pettigrew (Sminia, 2009), and the CCSC at Warwick University has championed this research perspective. From there a distinctive style of conducting longitudinal comparative case studies emerged (Pettigrew, 1985b, 1990, 1997) influenced by grounded theory (Glaser & Strauss, 1967) and grounded analysis (Strauss & Corbin, 1998). Pettigrew (1997) suggests that process research should be viewed as a cycle of induction and deduction, the researcher entering the field theoretically sensitised and with an initial question to be answered. As the data is collected an iterating cycle of inductive reason, pattern recognition and further deductive reasoning takes place. Mjøset (2009) describes methodologies as 'practical philosophies' determined by philosophical orientation and the research methods its proponents employ. Before moving on to look at contextualist methodology in more detail Figure 3-3 summarises how it sits between its philosophical underpinnings and methods.



Based on Quinn (2008)

Figure 3-3 Contextualist Methodology

A contextualist approach consists of three analytical categories: the 'what' of change encapsulated under the label content, the 'why' derived from context and the 'how' understood from an analysis of process (Pettigrew, 1987). Processual analysis aims to 'catch reality in flight' and study long term processes in their context (Pettigrew, Woodman, & Cameron, 2001). Contextualists take a historical view, going beyond chronology to facilitate collection of data at different levels of analysis. Contextual analysis draws on phenomena at the vertical and horizontal levels of analysis and the interdependencies between those levels over time (Pettigrew, 1990). The influence of context on the phenomena under investigation is important. Some contextualists dichotomize

context into the outer and inner contexts of the organization. Outer context included the economic, social, political and sector environment in which the firm is located. Inner context is the structural, cultural and political environment through which the ideas and actions for change proceed (Pettigrew, et al., 2001). Contextual analysis is flexible in the use of complementary theories and allows multiple interpretations and investigations of the research phenomena over time. Furthermore, Pettigrew et al., (2001) opine that contextualism displays many similarities with the coevolutionary perspective which may be important in this study.

According to Pettigrew (1990, 1992, 1997) the contextualist approach is best applied to the study of change process through adherence to five assumptions. These are summarised as follows:

1. The importance of embeddedness—processes are embedded in contexts and can only be studied as such. For this reason a multi-level analysis is required.
2. The importance of revealing temporal interconnectedness—understanding the sequence and flow of events over time is critical for the process researcher. History is important, with past conditions shaping the present and emerging future.
3. The role for context and action—context and action are inseparably intertwined.
4. A search for holistic rather than linear explanations of process—causation is seen as being neither linear nor singular with no attempt at searching for single grand theories.
5. The need to link process analysis to the location and explanation of outcomes—complexity reduction is sought through research design. Having a clear outcome to explain offers considerable advantage in process research.

In essence, as Pettigrew (1997:338) points out, the driving assumption behind process thinking in the contextualist approach is that social reality *"is not a steady state"* but a *"dynamic process"*. The overriding aims are to capture process of changing, to study long term processes in their contexts and elevate embeddedness to a principle of method. Pettigrew et al. (2001) observe the limited potential analytical power of contextualism arguing that the only way to address this limitation is to examine a sufficiently long time-series to show how multiple levels of context interact to revitalise the change process. As context cannot be built researchers must either reconstruct both context and process *ex post* or intervene in an ongoing process in an existing context (Mjøset, 2009). In this study the former approach is adopted. The process through which brands influences industry change are reconstructed towards an outcome (current industry structure) that has already occurred based on longitudinal data spanning over 50 years.

3.4.1 Level of Analysis

This study seeks to understand brand's influences at the industry level. Organizational entities reside in nested arrangements and there is increasing acceptance that any phenomenon of interest will be influenced by factors in the level above or below where it resides (Mathieu & Chen, 2011).

That is, the process of change unfolds within the context of multiple levels of analysis (Pettigrew, 1987, 1990, 1997). Mathieu and Chen (2011) refer to Rousseau's (1985) framework for multi-level research recommending scholars consider the levels of theory, measurement and analysis for their research. The level of theory refers to the focal unit about which generalizations are made. The nesting assumption of multi-level theories assumes that entities are members of only one collective at a particular level of analysis which are easy to identify when the level is the individual vs. the collective but harder to see in the modern era with blurring boundaries and complex relationships. The level of measurement refers to the unit to which the data are directly attached and the level of analysis to the level at which the data are assigned for hypothesis and testing (Mathieu & Chen, 2011). Industry maturity may influence the level that is of interest. Although emergence is generally conceived as a 'bottom up' phenomenon Kozlowski et al. (2013) observe that it is multi-level, process orientated and temporal. Moreover it is complex because it involves both process and structure. This is resonant of the duality of structure and action at the heart of structuration theory (Giddens, 1984) the process theory of contextualism (Sminia, 2009).

3.5 RESEARCH METHOD

Having explored the contextualist methodology and its philosophical underpinnings the chapter moves to the next part of the research design, the research method. The primary means used for the contextual analysis of process is inductive longitudinal case studies using comparative cases. Case research is an intensive research method (Sayer, 1992) and consistent with a critical realist ontology. Comparative case analysis can be case-orientated or variable-orientated but the latter is poor at handling the complexities of causality (Miles and Huberman, 1994) an essential element of critical realist approaches. This section will give an overview of the case study method employed in the study and how such case studies are implemented.

3.5.1 Comparative Case Based Method

> *"A case study is a history of a past or current phenomenon, drawn from multiple sources of evidence. It can include data from direct observation and systematic interviewing as well as from public and private archives. In fact, any fact relevant to the stream of events describing the phenomenon is a potential datum in a case study, since context is important" (Leonard-Barton, 1990:249)*

The importance of fit between the elements of a research design was addressed in Section 3.1. Some of the strengths of a case based approach for this study are outlined below. Case studies are:

- Useful for reasons of motivation, inspiration, and illustration[1] (Siggelkow, 2007). The exploratory goals of this study are consistent with inspiration;
- Appropriate when the research poses 'how' or 'why' questions, when the phenomenon under investigation is in the world of practice and the researcher has little control over behavioural events (Yin, 2009). These factors are consistent with this study;

[1] Case studies can motivate a research question or falsify an existing theory (motivation), inspire new ideas, or illustrate examples of existing constructs as applied to one or more empirical situations (Siggelkow, 2007).

- Particularly useful when there is uncertainty in the definition of constructs (Voss, Tsikriktsis, & Frohlich, 2002) which is true in relation to brand;
- Helpful in explaining the causal mechanisms of objects acting under certain conditions (Maylor & Blackmon, 2005) and facilitate the temporal ordering of these relationships in longitudinal studies (Menard, 2002);
- Beneficial in facilitating the generation of new insights and theories (Easton, 2010; Eisenhardt, 1989; Siggelkow, 2007);
- Suited to the Irish context due to the constraints imposed on cross-sectional studies by the small population of firms and industries (Leavy, 1994);
- Consistent with the acceptance of small sample sizes. Even *"[A] single case can be a powerful example"* (Siggelkow, 2007:20).

Case study is particularly suited to contextualist research because it provides an opportunity to examine continuous processes in context and draw on the significance of various interconnected levels of analysis thus revealing multiple sources and loops of causation and connectivity which are important in identifying and explaining change and its patterns (Pettigrew, 1990). They differ from case histories in that they allow for direct observation of events and / or interviews of the people involved in these events (Yin, 2009). Unlike historians contextualists are committed to the explanation of single cases by means of comparison with other cases to develop generalizations which emerge through the analysis of specificities (Mjøset, 2009). For these reasons this study will employ comparative longitudinal in depth case studies.

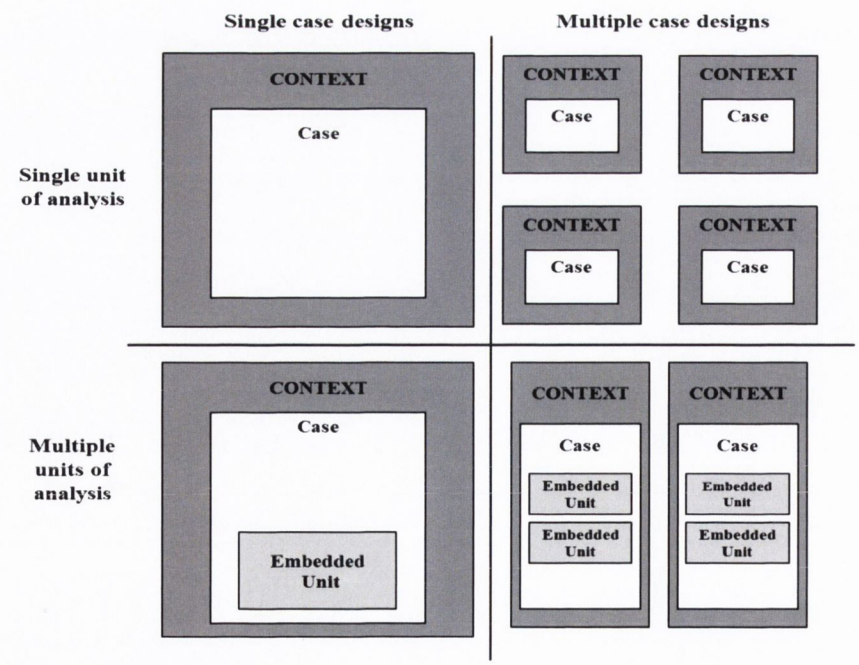
However, there are disadvantages to case studies. They are accused of lack of rigour enabling equivocal evidence or biased views to shape what a researcher sees, hears and records (Voss, et al., 2002) thereby influencing the direction of findings (Yin, 2009) and providing little basis for scientific generalisations. Contextualism strengthens the method although it can be hard to establish where context begins and ends (Blaxter, Hughes, & Tight, 2006). Cases can be long and difficult to conduct, producing massive amounts of data for analysis (Yin, 2009). This depth of data which is one of their strengths can make everything seem relevant, making it hard to determine what to exclude (Wolcott, 2009).

Some of these criticisms are predicated on the different epistemological orientations of researchers. Rigour and generalisation must be assessed in the context of the study's methodological assumptions. Rigour depends on every step of the research process being honest, transparent and open to verification. Bias is impossible to eliminate in qualitative research. However, the researcher can make their influences and values explicit throughout the research process (Maxwell, 2009). The question of generalizability is what some quantitative researchers see as the *"Achilles heel"* of case-based research (Leavy, 1994:111). Mintzberg (1979:583) asks *"what is wrong with a*

sample of one?" and Siggelkow (2007:20) draws attention to the case of the *talking pig* to illustrate the power of a single case. Pettigrew (1985b:242) surmises that *"case-study approaches cannot offer generalizability in a statistical sense...but even single case studies are capable of developing and refining generalizable concepts and frames of reference"*. Moreover Leavy (1991 cf 1994:111) maintains that if the case is *"an example of a generic class of process or phenomenon then the question of generalizability tends to become less of an issue."* The question of where context begins and ends requires clear identification of the boundaries of the focal unit. Finally, case research does create large amounts of data putting demands on the researcher. Essential skills in managing this data include conceptual ability, capacity to inductively recognise patterns in data, skill and perspective in the process of data collection and writing skills (Pettigrew, 1997).

3.5.2 Case Design

In case research the unit of analysis is the case and a single case study must be able to stand on its own. Four different types of case design were described by Yin (2009) and illustrated in Figure 3-4. They differ with respect to the number of cases and whether they are holistic or embedded. This study employs a multiple-case embedded design allowing for the exploration of phenomena at different levels of analysis and enabling comparison between different cases over time. Given the focus on long-term change a longitudinal design is imperative allowing for a thematic exploration of change through pattern recognition (Pettigrew, 1997). Pettigrew (1990:271) opines that *"truth is the daughter of time"* and time is both a neutral chronology and a social construction embedded in context. For the longitudinal researcher time is an integral part of the case design influencing when the process under study begins and when assessments can be made about its outcome.



Based on Yin (2009:46)

Figure 3-4 Basic Types of Designs for Case Studies

Pettigrew (1990) recommends the cases selected are polar opposites chosen to study extreme differences and facilitate comprehensive analysis. By examining each case as a total situation arising from a combination of conditions and then comparing each case with other cases enables the researcher to address causal complexities that produce important social changes (Ragin, 1987). It provides a basis for examining how conditions are combined in different ways and in different contexts to produce different outcomes. The two longitudinal cases constructed and analysed in this research were the wholesale grocery and telecommunications industries. The rationale for these choices is outlined in Section 3.5.3.

3.5.3 Case Implementation

Before describing how the research study was executed in Section 3.6 it is important to reflect on best practice in case study implementation. This overview draws on the literature to illustrate the theory that guided the field research, data analysis and conceptual development.

Researcher Skills and Experience

Maxwell (2009) acknowledges the influence of researcher's skills on this method. As a PhD student this researcher has limited academic field work experience, but with over 25 years professional experience is sensitive to the way Irish business is conducted. Yin (2009) suggests researchers must possess or acquire the following skills: the ability to ask good questions and interpret the responses, be a good listener, be adaptive and flexible and able to react to various situations, have a firm grasp of issues being studied and be unbiased by preconceived notions. Biases can emerge at any point during data collection and analysis and this attribute requires special attention from this researcher with a more subjectivist epistemology than Yin. She asserts that researcher bias is inevitable, particularly where a researcher has a deep understanding of the issues, and must therefore be acknowledged and managed[2]. Finally researchers need the social and political skills to develop and maintain credible relationships with interviewees (Pettigrew, 1990). This commences with the politics of access to research sites (Easterby-Smith, et al., 2008) and to the directors and senior managers this strategy research requires. As *"cold calling is notoriously difficult"* (Easterby-Smith, et al., 2008:129) the availability of personal contacts at a senior management level was an important determinant of case selection.

[2] In the interest of transparency the author's sectoral experience is as follows: she has worked as a brand and marketing manager in FMCG businesses (local and multinational); as a senior manager in a global telco; as a director in local and multinational advertising agencies with experience on retail, FMCG, telecoms, services and media accounts; as a brand consultant with experience across these categories. Throughout the 30 years of her career she has been based in Ireland, although she has been involved in international brand projects. She has served as a Director on the Boards of the Advertising Standards Authority of Ireland, Institute of Advertising Practitioners of Ireland and Association of Advertisers of Ireland.

Pilot Research

Authors such as Yin (2009) recommend the use of a pilot case study to assist in developing the research protocol. Given the holistic nature of contextualist research it is generally unnecessary to conduct a pilot. However, even though case studies are recommended when there is uncertainty in the definition of constructs (Voss, et al., 2002), the concerns with relation to the nature of brands and the language of branding in B2B research situations (e.g. Blombäck & Axelsson, 2007) indicated the advisability of preliminary research. Voss, et al. (2002:195) observe that new ideas are often developed *"by those working in close contact with multiple case studies—management consultants"*. The inclusion of experienced brand consultants and advertising agency directors presented an opportunity to assess the current level of brand understanding and brand management in Ireland[3], explore the strategic roles of brand and refine the exploratory framework.

Case Selection

Pettigrew (1990) advocates four guidelines for selecting industries:

(a) go for extreme situations, critical incidents and social dramas;

(b) go for polar types;

(c) go for high experience levels of phenomena under study;

(d) go for more informed sites to increase the probabilities of negotiating access.

The scholarship from Musgrave Group Plc requested empirical research in a wholesale industry. Wholesale grocery was selected because it met criteria (a), (c) and (d), the change in the industry being *"transparently observable"* (Pettigrew, 1990:275), multiple types of brand being evident across the industry and evidence of brand management. The relationship with the funding organization would facilitate initial access to key firms and to veterans who could provide a historical perspective and data. The challenge was to fulfil criterion (b). Although telecoms is a service industry with strong B2B dimensions it strongly contrasts with wholesale grocery with respect to industry structure and manifest evolution. It displays high experience levels of brand, high spending levels on marcoms and Irish telecoms case studies are available in the practitioner and academic literatures. Personal contacts would provide initial access.

The goal of this study is to explain the influence of brand on industries over time. Therefore the temporal boundaries of the case should encompass the emergence of indigenous branding at the focal level of analysis. Ideally the industries need to be mature enough to have a 'pre-brand' phase plus sufficient time to observe evolutionary processes when brand is present. The Irish wholesale grocery sector can be traced back to the 19th Century (Quinn, 2002) and telephony to 1880 (Litton, 1961)[4]. Pettigrew (1990) includes geographic focus as an element of planning longitudinal studies and Quinn (2002) observes that a small country like Ireland is attractive as a national context for

[3] Only three of the references in the literature review included empirical research conducted on brand in Ireland.

[4] Telegraphy can be traced back to the first half of the 19th Century.

research with embedded designs. Its relatively compact size in both economic and geographical terms facilitates multi-level analysis more easily than larger national contexts. Ireland is widely accepted as a microcosm of Western capitalist behaviour reflecting phenomena observed in other markets. Therefore the cases were restricted to the Republic of Ireland[5] with external contextual influences being recorded.

The secondary question (what is the nature of brand and how does it evolve) requires as many different types of brand as possible be included in the data. These two industry's value chains were observed to encompass a multiplicity of brand types addressing different customer segments. Finally, case selection helps determine empirical contributions. The literature identifies the paucity of industry evolution in non-manufacturing industries in general (Malerba & Orsenigo, 1996) and wholesaling in particular (Quinn & Sparks, 2007b). Furthermore, there is minimal research on brand in wholesaling or longitudinal research on B2B brands.

Industry Boundaries

Difficulties in defining industry boundaries were addressed in Section 2.3.3. Too narrow definitions may obscure some essential properties of the pattern of industry evolution hampering the study of change. There is precedent for adopting a wider definition when using a contextualist approach. The importance of enabling the cognitive aspects of industry boundaries (Porac, et al., 1989, 2011; Shearman & Burrell, 1987) to unfold during research also calls for a wider definition of the industry. To define the boundaries of the Irish wholesale grocery and telecoms industries standardised activity classifications developed by institutions such as the CSO, EU, Competition Authority, and industry regulators were employed.

Data Collection

Pettigrew (1990) recommends that the data collected be processual, comparative, pluralist, historic and contextual. This enables the development of cases that are not purely chronological but enable the emergence of analytical themes. Miles and Huberman (1994) exhort that strong and well-collected data is:

- locally grounded, collected in close proximity to a specific situation;
- rich and holistic enabling complexity to be revealed and provide vivid description nested in real context;
- collected over a sustained period of time to allow for the study of process and assess causality
- able to locate the meaning people place on events, processes and structures and connect their meaning to the social world.

[5] Including the Irish Free State in the period 1922-1948.

Olsen (2004) states that critical realism embraces methodological pluralism and the use of different techniques to access different facets of a phenomenon. Six sources of data are outlined by Yin (2009) classified as: documents; archival records; interviews; artifacts; direct observation; and participant observation. However, as cases in this study are reconstructions of historic processes (Mjøset, 2009) the first four sources are most relevant. Data may be qualitative, in the form of language or visual artifacts, or quantitative but most cases involve elements of both. Each type of source has strengths and weaknesses. For example, archival records are a good source of factual records while interviews allow for the inclusion of personal memories and perspectives of events. Although artifacts have less potential relevance in most case studies (Yin, 2009) the inclusion of physical and cultural artifacts such as advertising and packaging are relevant to a study of brand.

Interviews are a source of rich data but also have the potential to introduce bias. Some scholars including Pettigrew (1990, 1997) recommend the use of a pro-forma interview schedule or questionnaire commensurate with a structured or semi-structured interview. But Easterby-Smith et al. (2008) observe that in-depth interviews aim to understand events from the interviewee's viewpoint and uncover why they have this particular viewpoint. A pro-forma questionnaire may inhibit the interviewer from pursuing opportunities to explore these insights or following-up leads that surface. A balance must be found between the potential for bias and the need to gather information. Leonard-Barton (1990) likens interviewing skills to those of an investigative journalist, keeping in mind the information from previous sources whilst probing for new information. Open-ended questions and the use of probes as an intervention technique help facilitate this dichotomy (Easterby-Smith, et al., 2008). Interviews can be the source of anecdotes (Mintzberg, 1979) that help the researcher understand past events, enrich the case narrative and present the case's arguments in a compelling way (Siggelkow, 2007).

Webb et al. (1966 cf Lee, 2000) coined the term 'unobtrusive measures' to refer to data gathered by means not involving directly eliciting information from research subjects. Documentary and archival data are 'unobtrusive measures' and in longitudinal research may be the only sources available (Pettigrew, 1973). They are good for identifying major events, crises and conflicts and for providing context information, expanding the range of data and participants available and allowing access to information that could not otherwise be collected (Marshall & Rossman, 2006). However, documentary data is not without problems. Data can be incomplete and selectively compiled. In addition, documents that survive may be discriminating (Pettigrew, 1990) with, for example, data considered unimportant at the time not being retained. Therefore documents produced by politicians, journalists, commercial enterprises, etc. can introduce bias where they were not originally intended for research. Longitudinal case research generates large volumes of data and creating a case study database helps organise and subsequently analyse the data. It can also be used as a source of data for subsequent analysis by this or an independent researcher (Yin,

2009). To maintain the separation between the raw data and the subsequent case study report Yin (2009) recommends building databases for each.

An inherent bias of reconstructed case studies is the issue of failure. Williamson (1999:fn3) opines that stories of failure can be more informative than success stories *"especially the failures of once successful enterprises to adapt to new circumstances"*. As Aldrich (2001:117) observed *"our journals are filled with studies of mostly large organizations or the surviving members of much larger cohorts of all kinds of organization"*. As a corollary many of the potential population for a longitudinal study exited before the study commences and the researcher is left with the *"remnant of selection processes"* (2001:117) that have happened in the past.

Triangulation is important when using multiple sources of evidence. Miles and Huberman (1994:266) wryly observe that it is *"a near-talismanic method of confirming findings"*. It occurs when a phenomenon is studied from more than one perspective be it a source of data or method (Maylor & Blackmon, 2005). Thus it gives research using multiple data sources some convergent validity (Bryman & Bell, 2007). Eisenhardt (1989) stresses the use of triangulation to detect errors and prevent single point bias influencing theory building. Triangulation captures a more contextual portrayal of the unit under study (Jick, 1979) and offers ways to enrich data analysis (Olsen, 2004).

Data Analysis

Miles and Huberman pose a simple question:

> *"How can we draw valid research from qualitative data? What methods of analysis can we use that are practical, communicable, and non-self-deluding—in short, will get us knowledge that we and others can rely on?" (1994:1)*

The literature on contextual analysis focuses on fairly general guidelines (Pettigrew, 1990, 1997; Pettigrew, et al., 2001; Quinn, 2002) rather than specifying an explicit analytical system. Before answering the primary question which asks 'how' brands influence industry evolution the fundamental nature of brand must be ascertained (a 'what' question). This can only be answered by analysing associated events that take place as a result of actors (including non-human actors) acting, recorded at the Empirical level and explained to offer insight into the Real (Easton, 2010). Similarly processes influenced by brand must be explained in the context of the realist ontology.

Van de Ven (1992) states that when processes are the focus of study the researcher must place themselves in the temporal and contextual frames of reference under study. Grounded analysis lets the 'data speak for itself' rather than interrogation against predetermined constructs as in content analysis. Glaser and Strauss (1967) work encouraged researchers to use creativity and imagination when developing theory and a rigorous method by which this could be achieved (Easterby-Smith, et al., 2008). However, whatever technique is used the analysis of data *"is both the most difficult and the least codified part of case-based research"* (Eisenhardt, 1989:539). Miles and Huberman

(1994) add that there is no substitute for thinking about the data deeply and continuously and having the conceptual ability to recognise their analytical potential. The use of Computer-Assisted Qualitative Data Analysis Software (CAQDAS) to facilitate analysis does not remove this imperative. It facilitates new ways of searching and testing data but as Richards (2009:188) points out *"[s]oftware doesn't analyse - you do"*. Despite increasing acceptance of CAQDAS questions remain around whether it accentuates or addresses the inherent challenges in qualitative research; namely de-contextualisation and dis-assembly (Atherton & Elsmore, 2007).

Whichever method of analysis and coding is adopted the use of memos is recommended. These are brief analytical notes that contain insights the researcher achieves during the analysis process (Miles & Huberman, 1994). They should be continuously matched and contrasted to refine understanding and to see how well or poorly they fit with the case data (Eisenhardt, 1989). Visual maps or diagrams representing processes and their iterative dynamics are a useful tool for analysis and for communicating processes (Langley, et al., 2013). As Wolcott (2009:31) observes that it is *"only through the examination of data that data themselves take on meaning"*. Pettigrew (1990) advises the use of cycles of expanding complexity and simplification as useful in managing the analysis of the large amounts of complex data involved in longitudinal contextualist research. The potential for bias must be considered during data analysis and case construction. One test for bias is to test preliminary findings and consider alternative explanations (Yin, 2009).

A variety of research outputs can be delivered during the research process. Pettigrew (1990) suggests the following sequence: the case as analytical chronology; the diagnostic case; the interpretative or theoretical case; the meta-level analysis across cases. The analytical chronology is an essential element in the process because it lays out the narrative across multiple levels of analysis helping reduce and make sense of the data and suggesting early analytical themes and causality. Central to the production of a chronology is periodization which summarises and structures historical material. Hollander et al., (2005) suggest that periods should mark turning points in the phenomenon being studied rather than fixed time intervals such as decades. This logically assumes an *ex post* inductive approach. They also identify problems of periodization including reductionism, consistency, duration and false sense of progress. The diagnostic case assists in generating inductive patterns which form the basis for linking emerging themes with wider theoretical debates in the literature. These are expanded in the meta-case analysis where there is no imperative to preserve case integrity.

Integral to inductive approaches is taking the conceptual leaps that transform data into ideas (Klag & Langley, 2013). But like the tricks of most skilled trades its techniques are not well documented (Richards, 2009). Thought experiments and preliminary conclusions help connect initial findings with existing theory and feedback can help test the findings and improve validity. Illustrating each

conceptual argument with concrete examples from the cases makes it easier for the reader to understand how this argument might be applied to additional empirical settings (Siggelkow, 2007).

Validity

Questions of validity rest to a large extent on the ontological and epistemological underpinnings of the methodology. The conventional positivist constructs of internal validity, external validity, reliability and objectivity are ill suited to contextualism. This does not remove the requirement to adhere to cannons of quality. Lincoln and Guba (1985, 2000 cf Marshall & Rossman, 2006:251) call such constructs *"establishing the truth value"* and they include credibility, transferability, replication and neutrality. Richards observes:

> *"Good qualitative research gets much of its claim to validity from the researcher's ability to show how they got there, and how they built confidence that this was the best account possible" (2009:152).*

This relies on providing a detailed account of the project's history so that the reader can track the entire process. Triangulation of multiple sources can help ensure validity. Through clear recording and by outlining the limitations of the project credibility can be established. Transferability or generalizability rests on how applicable and transferable the findings are to another setting or group of people (Marshall & Rossman, 2006) and was discussed in Section 3.5.1. Neutrality refers to potential researcher biases which have also been addressed above.

3.6 EXECUTION OF THE STUDY

This section provides an account of how the study was conducted endevouring to make explicit each aspect of the process. Contextualist research does not unfold in sections or straight lines but iterates between the existing knowledge and emerging ideas, deduction and induction and data collection and analysis. To track progress and keep a reference of decisions diaries, notes and memos were maintained[6]. One advantage of being a senior practitioner-turned- researcher is access to the board level actors. Another was having relevant experience in grocery and telecoms thereby entering the field with some knowledge. But this was constructed from a single perspective and could lead to bias. Therefore personal recollections were scrupulously triangulated with alternative data sources and referenced if used.

3.6.1 Pilot Research / Brand Expert Interviews

Prior to the field research 16 interviews were conducted with 14 senior executives with brand expertise. All were personal contacts and included CEOs of advertising, brand and marketing services agencies, CEOs of client companies with a marketing background and experts in particular aspects of management relevant to brand (See Appendix A). This research sought to confirm or refine the exploratory framework, build a background on brand management in Ireland, explore the

[6] Microsoft OneNote was used for desk research and decisions. Written diaries were used to capture field notes and for visualising emerging conceptual relationships.

language of brand and proxies that could be used. Serendipitous findings helped validate the 12 strategic roles of brand deduced from the literature[7], reflect on the relationship between industry boundaries and brand and explore how interviewees made organizational purchasing decisions. During the interviews lasting between 30 minutes and three hours various approaches to recording were tested ranging from field notes only to sound recording and field notes. The optimum solution was recording, allowing the capture of rich language augmented by field notes and observations. All data was transcribed and added to the research database.

The data was categorised and content analysed and a short research report was produced. Some minor amendments, particularly around brand equity, were made to the exploratory model as a result of the research. But the value of this research became increasingly evident in the case analysis as all had worked in grocery and / or telecoms and their input was used as case data in line with the contextualist method. Data relevant to the two longitudinal cases was incorporated into appropriate databases for later subsequent analysis.

3.6.2 Industry boundaries

The manifest boundaries of both industries have changed over the last five decades and boundaries between value chain segments have blurred. For example, grocery wholesalers have expanded into retailing and foodservice while telecoms have converged with computing and broadcasting. Boundaries used throughout the construction of the case narratives were those that would be meaningful to contemporary understanding. The following guidelines were adopted.

Wholesale Grocery

Historically a grocery wholesaler was defined as *"any person who purchases from a supplier the goods for resale to retailers"*[8]. Today the Competition Authority makes a distinction between two types of wholesaler, wholesale-franchisors and independent wholesalers, but these distinctions are relevant only in the context of retail grocery and do not take into account the significant activities of wholesalers in the foodservice sector. The way in which industry actors are reported, measured and identify themselves compounds the difficulty in identifying the boundaries. Detailed census information is no longer compiled by the CSO and wholesalers may attribute employees, turnover, share or profitability of independent aligned retailers to their trading brands rather than the retail level of the value chain.

The definition of grocery goods varies according to the terms of reference of the source material. For the purposes of this case a grocery good is defined as *"food and drink sold for human*

[7] These strategic value creating roles of brands were contemporaneously presented at the Irish Academy of Management conference in Cork (Marks & Quinn, 2010).

[8] Fair Trade Commission. (1972).The Supply and Distribution of Grocery Goods for Human Consumption. Dublin: Stationery Office

consumption and household necessaries"[9] (see Appendix B) and encompasses those sold through foodservice defined as *"foods consumed away from home"*[10].

Telecommunications

A telecoms network operator (telco) facilitates the transmission of inter-personal communications initiated by a transmission device and terminating with a receiving device. The industry comprises retail and wholesale providers of fixed voice and data, mobile voice and data and retail cable and MMDS[11] broadcasting. It is bounded by NACE Division 61 classification of economic activity (see Appendix C). Within this definition are discrete competitive markets regulated by The Commission for Communications Regulation (ComReg) in accordance with Irish and EU legislation (see Appendix D and Appendix E). ComReg serves as the most comprehensive source of industry structural data reporting on fixed line operators, the incumbent (Eircom) and other authorised operators (OAOs)[12], mobile network operators (MNOs) including Mobile Virtual Network Operators (MVNO)[13] and cable and satellite broadcast operators. Notwithstanding the role of other industries, especially transmission devices, play in delivering the service or the influence they exert on customer choice of telco they are deemed supplier or distributor industries. Likewise, despite increasing provision of media and content services by telcos, content creation is expressly excluded from NACE Division 61[14].

3.6.3 Data Collection

Most of the data was collected between January - October 2011 and December 2011 - August 2012. However, typically of inductive research, some data collection continued over the course of the project until 'saturation' had been reached. Every type of brand was included in this process.

Access and ethics

The benefits of connections built up in practice were of considerable advantage in getting to high quality respondents, documents and archives. The researcher was able to draw on contacts from her experience in the grocery, telecoms, advertising and consultancy sectors to gain initial access[15] and respondents were then instrumental in 'snowballing' contacts. The credibility and trustworthiness of the researcher was enhanced by her reputation, her service on industry boards and the credentials of Trinity College Dublin. Social media provided a mechanism to reach some

[9] Competition Authority. (2008). A Description of the Structure and Operation of Grocery Retailing and Wholesaling in Ireland : 2001-2006. Dublin: Competition Authority. p 14
[10] Bord Bia (2010a) Channel Opportunities in the Irish Foodservice Sector. P 18
[11] Multi-Channel Microwave Distribution System.
[12] OAO used to be described as Other Licenced Operators (OLOs). OAO is used throughout the case.
[13] A MVNO offers mobile services to customers but does not have an allocation of spectrum, paying existing operators for the use of their mobile networks.
[14] ComReg revenue figures for broadcast do not include incomes from advertising, publishing, licence fees or other ancillary sources.
[15] The researcher would also like to acknowledge the help of Dr Jim Quinn in setting up some initial contacts.

contacts and no cold calling was required. Access to proprietary information was provided by respondents who were generous in their time and effort. While all respondents were relaxed and forthcoming during interviews there was reticence around sharing some contemporary proprietary information due to the sensitive nature of their construction[16].

Strict ethical guidelines were adhered to throughout the study. Each interview commenced with an introduction to the nature and purpose of the research and a guarantee that their input would remain confidential if requested. Permission was asked for the use of a digital voice recorder to which none had an objection. During at least five interviews the respondent asked either that the recorder be turned off or that they are not quoted on a piece of information or anecdote. This presented the researcher with an ethical challenge as some of these stories were particularly colourful. While they were, of course, not used it is likely that they influenced the perceptions of the researcher. It should also be noted that information some respondents were unprepared to give was available in the public domain particularly in newspaper interviews and trade journals.

Documents, Archives and Artifacts

The collection of documentary data began prior to the start of the interview. In both cases an attempt was made to collect data before branding indigenous to that industry emerged. This was uncontentious in telecoms due to its monopoly status but less clear in wholesale grocery. Based on published research identifying 1960 as the start of modern retailing (Sexton, 1970) it was decided to start in the early 1950s. However, early documents in both industries made little or no reference to brand, marketing or reputation requiring 'poking about in corners' to find the logic of branding. Longitudinal data were collected covering key industry events and brand-related activities spanning over 50 years. Each source was referenced and added to an EndNote library which served as part of the case database with detailed key words and research notes to facilitate analysis. Every brand encountered was recorded and added to a spreadsheet identifying its (estimated) launch date, ownership, strategic group or level of the value chain to which it was attributed, and a reference code for the source of this information.

An existing longitudinal study (Quinn, 2002) was the starting point in the wholesale grocery case and a sector history of the independent grocery trade produced by RGDATA/IADT formed another important source. Access was given to Musgrave's company archive including minutes from historic Board meetings and accounts of PR activities. Other sources of information accessed included: strategy documents; trade journals (wholesale and retail); newspapers; company histories; industry reports; market reports; business magazines; company documents; annual

[16] This was encountered with respect to market share data. One reason for this is that data mining techniques are used to compile these figures. Approximations were given where information was not in the public domain.

reports; corporate, industry and news websites; packaging, advertising and marcoms materials[17]. Government publications included: CSO reports; reports from the Fair Trade Commission (FTC) and Competition Authority. Unfortunately no comprehensive record remains of advertising expenditure prior to 2007 but recent data was supplied by Carat. Over 500 documents or articles were used to extract information relevant to brand and the industry.

A similar approach to gathering documentary and archival evidence was applied to the telecoms industry. Here industry and advertising case studies and biographies proved useful but trade magazines were practically non-existent. Company websites contained archives of press releases which served as a means of reviewing brand launches and brand related activities. Professional experience directed that company-generated materials such as this should be tempered with respect to claims of expenditure and market share (this is equally true for trade magazines in grocery). The statistical data collected by ComReg and its predecessor the ODTR are the most reliable industry data available. But this data is only available for the 21st Century and earlier statistics were compiled from Telecom Éireann annual reports and industry and market profiles. Carat supplied media expenditure figures and over 400 sources were analysed.

Interviews

Interviews formed the most important source of data for exploring and understanding the role of brand within each industry. They commenced following some initial analysis of documental data and the processes continued in parallel. In total, 56 industry-related interviews were conducted with 52 individuals including current CEOs and senior managers, industry veterans, managers and executives in brand related roles, trade association executives, advertising and brand agency suppliers. These are summarised in Table 3-2 and Appendix A gives details of each interviewee.

Data Source	Brand and Marketing Experts	Wholesale Grocery Industry	Telecoms Industry
Interviews	16	32	24
Organizations	14	14	15
Interviewees	14	31	21
CEO (ex CEO)	10	14	7
Director (ex Directors)	2	9	5
Senior Manager	2	3	6
Manager	0	5	1
Dates active in Industry	1960s onwards	1940s onwards	1976 onwards
Secondary data sources		>500	>400
Date of sources		1952 - 2011	1926 - 2012

Table 3-2 Summary of Data Sources

[17] Many of these were photographed.

Interviews lasted one and a half to two hours with one running to three and a half hours. The venues varied from executive offices to hotels and restaurants with two telephone and two Skype interviews. All interviewees agreed to follow up contact and this was availed of in a number of cases (sometimes via email).

Subsequent to the pilot a careful review of brand-related language was undertaken to ensure that language was appropriate to each individual. Anything considered 'brand jargon' was assiduously avoided. It was also decided that a pro-forma interview schedule was not appropriate to the project as each interviewee brought different experiences and perspectives. Therefore questionnaires were individually customised to optimise data collection although a few questions were asked to all interviewees for benchmarking and rigour. These included: their definition of brand, the boundaries of the industry and the key brands in the industry. One of the final questions was *"what do you think the wholesale industry would look like today without the presence of brands or branding activity"?* These in-depth interviews were fluid in their format allowing the interviewees to speak freely with encouragement to tell stories relating to the industry and the brands within it. Where specific data was being sought gentle probes were used. Some brought documents and artifacts to the meetings and others followed up interviews by sending such data. The experience of the researcher in the industries had a downside in that some interviewees suggested she would know the answer better than they.

The literature cautions on the use of singular sources of data and so every attempt was made to triangulate data. Memories are fallible, especially with respect to figures, and secondary sources were used to improve its integrity[18]. A list of secondary sources used is found towards the end of this document. One final issue that emerged was reticence in talking about business or brand failures. When the researcher was aware of this secondary sources were used, but it is likely that some were not recorded[19]. All field notes and recordings were saved as well as transcribed.

3.6.4 Data Analysis

The method for analysing contextualist case data is not prescriptive. This section seeks to outline how it was enacted in this study. Implicit in the use of inductive, abductive and retroductive techniques is the use of creativity, imagination and conceptual abstraction. These are by their nature difficult to describe. The analysis of the data could be deemed to have started during the review of the literature when 12 roles that brands can fulfil were induced (see Section 2.2.3). The analysis of the field data commenced at the early stages of data collection and became an on-going, iterative process. This enabled the data already obtained to generate strategies for the collection of

[18] The interviewer was sometimes aware that what the interviewees reported did not align with her memories. In these cases secondary data was always used before data was included.
[19] In one case a director of a company that was liquidated denied all knowledge of the brand. In the interest of good manners this was not pointed out to the interviewee.

new data as suggested by Leonard-Barton (1990). Although the data analysis was guided by the research questions and exploratory and theoretical frameworks, the objective was to be as inductive as possible letting themes emerge from the data. Therefore new codes were added in response to patterns that emerged, theorising, memos and diagrammatic representations of the data.

The data was analysed manually rather than using CASDAQ for a number of reasons. Firstly, the researcher felt that manual coding would keep her closer to the data. Secondly, she had concerns that CASDAQ can de-contextualise data. Thirdly, and pragmatically, early training was unavailable on NVivo and she had experience in manual coding. However, extensive use was made of computer applications such as Microsoft Excel spreadsheets, word search on Microsoft Word and key words in EndNote to accelerate search and help visualise relationships between data. Paper-based methods involving coloured markers on transcripts and documentary data was also used to extract data and facilitate ongoing coding and analysis.

Stage 1 - Chronology

The analysis started by building a simple chronology of the brands native to each industry. Primarily built up from the archival data it was augmented with interview data. Each brand was attributed to an organization, a strategic group and a level of the value chain. The date it was launched and if appropriate discontinued was included. From this the types of brand extant in the industry and organizational brand architectures could be deduced. A second chronology was created in parallel. This arranged the key contextual and brand related events occurring in the industry chronologically and cross-tabulated them with the type of brand, owner and level of the analysis (See Figure 3-5 for an example). Finally indicators of industry structure including market size (to assess growth), market share and SOV (industry concentration and rivalry), strategic groups, buyer and supplier power were arranged chronologically to indicate structural change.

Year	Month	Activity	Operator	Subbrand	Fixed Line	Mobile	MVNO	Tariff	Retailer	Intrnt/Brdbnd/Voip	Tel Eireann/eircom	Legislatn & regtation	Network Structure	Reviews	Id. relns/ind. asscns	Internal brand	Esat	Eircell	Vodafone	Meteor	3	O2	Handset	Marketing	Rebrand	Leadership	Cable
1998	8	Digifone Takes a majority stake in Cellular World				1			1								1						1		1		
1998	8	Eircell buy Let's Talk Phones				1			1		1							1					1		1		
1998	9	Eircell agree roaming deal with Meteor				1							1					1		1							
1998	11	Announcement of Autowatch a joint Eircell Telecom Phonewatch initiative		1	1						1							1									
1998	11	Esat Digifone launch Speakeasy (prepay). Entry delayed and enter 1 yr after Eircell impacting on share.		1		1		1									1										
1998	12	1/12 Deregulation Day. Esat Clear launched for residential market with massive advertising campaign.			1			1			1	1					1							1	1		
1998	12	1/12 Government voluntarily drops derogation from full			1							1															
1998	12	1/12 Interoute (operating under the Spirit brand) awarded first general licence.	1	1	1							1	1											1			
1998	12	1/12 Irish telecomms market fully deregulated. 29 licences awarded the previous day. Class 1 (8 licences) and Class 2 (21)			1							1	1		1									1			
1998	12	12 e.TE has relaunched a customer charter which guarantees compensation if new line not connected									1													1			
1998	12	Christmas gifting of mobiles grows				1			1				1				1						1	1			

Figure 3-5 Temporal and Spatial Coding

Stage 2 - Extracting and Coding the Data

Although some preliminary codes were developed based on the exploratory framework and research questions prior to the start of the analysis of the interviews and the documentary evidence the objective remained to allow patterns to emerge from the data. Each source was manually coded and coloured markers were used to identify emerging themes in interview transcripts and key words assigned to documentary sources. These narrative codes allowed specific data to be associated with themes, some of which were given descriptive names. For example, mobile brand wars, fighting the Eircom monolith, the wholesalers fight back, etc. The chronology was kept intact during this process.

Stage 3 - Building extended case reports

Extended case reports were written following a longitudinal format. These were periodized based on critical events in the industry and were used to 'tell a story' (Pettigrew, 1990), developing the case narrative as openly as possible. They therefore included a vast amount of data[20]. Much of the original language was retained to maintain the context and serve as examples to enrich the final case narrative. Each case started with an overview of the industry today to illustrate how much it had changed and form a basis for bringing the reader on a journey of discovery through the subsequent chronological narrative.

Stage 4 - Interpreting the case narrative

Using the extended case narratives as the source of data, the data was re-coded using the exploratory and theoretical frameworks and emerging themes. This started the process of considering theoretical explanations such as power and efficiency for the data while still allowing concepts to emerge from the data. For example the role of regulation in the industry, the roles of brand management in change, the influence of agencies and the guarantor of quality constituted new narrative codes. Thoughts and comments were added to the database drawn from and as a basis for new memos (See Figure 3-6).

Stage 5 - Identifying the Evolution of Brand

Conceptual patterns emerging from these reports suggested that the periodization did not fit well with changes in brand practices. Drawing on Hollander et al. (2005) the data was re-periodized based on an *ex post* inductive approach to important turning points in brand, specifically the level of brand evolution. This was an important stage of analysis in determining the nature of brand and formed the basis for the case narratives presented in Chapters 4 and 5.

[20] These ran to over 50,000 words plus footnotes and appendices.

Thought	Telecoms Evidence	Comment	Other	BP	BPFI	BPPC	BPNM	BM	BMPI	BMPC	BMNM	CP	CPFI	CPPC	CPNM	BIC	BICI	BICV	BICNM	EB	EBIS	EBIA	EBOP	CMKT	SC	CC	TC	IMCI	BOC	LC	ABC	AMC	IMCH	Strategic group or platfo	TCE	Efficiency	Power
Handset brands	GSM facilitates rise of Nokia over Motorola. Build relationship with customers.	Power										1		1		1	1	1				1				1										1
Positioning	Esat clearly positioned against TE. This is the first strong alternative positioning in the industry. .....Melly positioned TCL for the corporate market.							1	1			1	1			1	1			1							1		1		1					
Risk	TE undermined new entrants by questioning whether they would survive and be able to deliver continuity or consistency of service	Risk						1	1			1	1																				1			
Handset manufacturers	Innovation and marketing to stimulate demand and control the relationship with customers. Move towards them becoming the GOQ.							1		1		1		1		1	1									1										1
Subsidies on handset	The requirement to subsidise handsets redistributed value towards the suppliers. .....Triggered war between handset brands and triggered changes in retail channel	Power - TCE										1	1	1		1		1		1		1			1										1	1
B2B brands	Wholesale activity created additional dimension for B2B brands			1	1							1	1																				1			1
Impact of competition	Competition in the residential market generated more intense brand building activity and more media coverage than B2B.							1	1			1	1			1	1									1	1				1					

Figure 3-6 Within Case Coding

Stage 6 - Case Analysis

Treating each case as a whole and drawing on the coded data the analysis moved on to consider changes occurring over time and across various levels of analysis. A specific part of this analysis was to identify emerging themes with respect to the agency of brand. These were captured and coded in an iterative process with extensive use of flowcharts and drawings. Having completed this for each case a within case analysis was constructed based on the level of brand evolution. Thus the socially constructed dimension as well as the chronological dimension of time was included. These were the basis of the cross case, or thematic, analysis of the data.

Stage 7 - Determining the Nature of Brand

The nature of brand was induced through abductive analysis. The primary stimulus for this was the extant literature and gaps in the exploratory powers of each definition. The concept of brand as a social technology arose from a hunch or creative leap, but retroductive analysis was used to validate this conception. This served as an input into the final level of analysis.

Stage 8- Meta-Case Analysis

The final level of analysis encompasses the empirical findings with the contextual framework (existing literature and extant theory) to answer the research question. The structural integrity of the cases were not retained in this stage of analysis consistent with Pettigrew (1990). This stage required iterating backwards and forwards between the conceptual development and the literature. In some cases concepts that had seemed important in the conceptual framework and did not emerge in the analysis were rechecked against the raw data. The significance of these types of

discrepancies was an important springboard in generating further conceptual leaps[21]. These in turn required that literature beyond the scope of the original review process be consulted. The underlying mechanisms capable of causing the events in the Actual and were perceived in the Empirical level were retroducted forming the basis for a multi-level, multi-modal explanation of how brands influence industry evolution in the Real. In addition to exploring alternative explanations the draft findings were shared with other researchers and with practitioners. This final activity was undertaken due to the goal of contributing to practice[22].

3.7 CONCLUSION

This chapter explores the research methodology and describes how the study was executed. It starts by explaining the chosen methodology and justifying this choice. The contextualist methodology is based on the work of the CCSC unit at Warwick University. The chapter explores the theoretical underpinnings of the methodology and their fit with the longitudinal case method using comparative cases. The use and importance of an initial pilot was explained. The multi-level, multi-modal and longitudinal nature of the study was addressed as were issues of validity and generalizability. An account was given of the choice of industries and their boundaries. Finally the collection and analysis of data was outlined so the process was transparent to the reader. Chapters 4 and 5 present the case narratives generated from the data.

[21] Differentiation is a central role attributed to brand in the literature it had been expected that there would be a 'differentiation process' but the thematic analysis did not uncover one. A further analysis was undertaken of all the case data to establish whether it had been missed. Every mention of the words differentiate, differentiation and difference was counted and reviewed in each interview. The transcripts contained over 370,000 words and the appearance of these words, in a relevant context, was differentiate 27, differentiation 8 and difference 25. Of the 27 mentions of differentiate 6 were in a negative context. The observation was therefore confirmed.

[22] Three senior brand experts were taken through the findings. All have experience not only in brand but also as directors in a variety of industries.

CHAPTER 4 CASE STUDY: IRISH GROCERY WHOLESALING

4.1 INTRODUCTION

In this chapter and the next the case narratives are presented. They tell the stories of the evolution of two mature industries and the influence of context and the agency and history of brand on industry structure. The cases selected show 'indigenous' brands emerging during the living memory of managers and display high levels of branding today. Each narrative commences with the industry today, the outcome of a process in which brands played a role. This is followed by a chronological account periodized by the level of brand evolution and built around the exploratory frameworks and narrative themes. The cases expose the Empirical reality suggesting a relationship between brand and industry evolution but they do not describe the underlying processes and mechanisms that explain how. These will be addressed in Chapters 6 and 7.

4.2 RESEARCH WITH BRAND AND MARKETING EXPERTS

As a preface to the case narratives this chapter starts with an overview of the interviews with brand and marketing experts. All had worked on brands found in one or both of the focal industry sectors and as such they give an insight into how brand has been perceived, defined and managed in Ireland and the target industries since the early 1970s.

4.2.1 Defining Brand

Jim Dunne observed that *"brand is a tricky word"*[1] and no common definition emerged. Yet there was consensus that a holistic interpretation of brand is emerging despite some managers still interpreting it primarily in terms of ownership, identity and image. Brand is conceptualized as a promise of quality and trust that facilitates the decision making process. It is the *"sum of the opinions, associations, attributes and attitudes that people think of when the name is mentioned"*[2] these attributes being rational and emotional. Brands have a *"unique, compelling and differentiating positioning"*[3] , a personality and reputation manifest in relationships between the company and consumers and reflecting customers' self-perception. This interpretation of brand was judged consistent with de Chernatony's conclusion that *"a brand could be defined as a cluster of values that enables a promise to be made about a unique and welcomed experience"*[4]. Emerging concepts of brand included brand as a platform and brand as a guiding idea or principle[5].

4.2.2 The Language of Brand

The language of brand lacks consistency encompassing marketing buzz words that can negatively impact perceptions of brand within organizations. In order to engage managers uncomfortable with marketing particularly in B2B situations proxies have been used. Despite disagreement as to whether reputation is a proxy it was acknowledged that the word is used to substitute brand. Other

words identified as proxies included positioning, value proposition, relationships and promise, while values and culture were used or preferred for internal branding[6]. The language of brand can be tailored by marketers to facilitate prevailing attitudes towards brand within a specific industry.

Brand value and brand equity were understood as separate concepts; brand value being a complex financial process rarely undertaken in Ireland whereas brand equity is measured using a variety of methods. Brands are co-created by the company, its agencies and diverse stakeholders including: customers; shareholders; financial analysts; consumers; the media world surrounding the brand; the employees and agents of the company. This holds true for consumer and B2B brands but personal relationships are a particularly salient dimension in the latter for routine and high risk purchases[7].

4.2.3 Evolution of Brand Management

The start of brand management in an industry is inextricably linked to a 'ground zero' defined by John Fanning as the point *"when someone decides they want to shape it [the brand] and manage it consciously rather than letting it develop unconsciously"*[8]. Brand management has evolved in its sophistication in product and service industries since the 1960s. During the second half of the 20th Century advertising agencies were the locus of much branding capability and strategic thinking, often *de facto* guardians of the brand[9]. Although senior managers engaged with agencies, tactical brand management resided within marketing departments.

As the concept of brand evolved a new breed of CEOs started to take responsibility for their brands[10] recruiting senior brand specialists and / or increased services of brand agencies whilst internal and employer branding drew HR and internal communications into the branding process. Concurrently the quality of marketing personnel was seen to decline relative to other functions[11], few marketers were appointed to boards which were dominated by those more comfortable with financial and operational rather than customer based data[12]. Dara Neary notes that *"marketing is one area where it [outsourcing] is done more than other areas. The advertising agency is kept on tap... as is the brand agency"*[13]. Today strong brands are acknowledged as important assets when negotiating deals with banks or during merger and acquisition activity; 'goodwill' primarily attributed to brand value[14]. Where leaders are brand orientated brand based projects have grown in importance yet when marketing drives them they struggle to engender cross company support[15].

The advent of the digital era created new challenges and opportunities for brand management. It encourages greater levels of conversation between a brand and its customers but also between customers thereby reducing management's ability to control the brand message and increasing the risk of brand damage[16]. The requirement for new content is voracious stimulating the emergence of new types of agencies, marketing expertise and ways of conceptualizing and managing brands.

4.2.4 Brands and Value Creation

The expert research was not specifically designed to validate the roles of brand developed from the literature. However analysis of the data generated examples of how brand fulfils these roles. These are summarised in Appendix F.

4.2.5 Brands and Industry Evolution

All interviewees observed the importance of the context in driving industry evolution. Context influences business strategy and performance but also prevailing attitudes towards brand thinking and brand choice[17]. External context creates the environmental shift that catalyses the start of active branding (ground zero) and some subsequent shifts whilst other transitions are triggered by a disruption of the value chain or innovation. Branding is a response to these changes rather than an initiator of it and could be described as a lag indicator of environmental change[18]. Industry boundaries and industry architecture may be defined by shifting positioning and customer perceptions in response to innovation and marketing within the category[19].

4.3 WHOLESALE GROCERY CASE INTRODUCTION

Wholesale grocers have a long history in Ireland. Throughout the first half of the 20th Century they were found in every town supplying ambient grocery brands to independent retailers. By 2011 Musgraves Group Plc and BWG dominated a market distributing a vast portfolio of grocery products and mostly focused on supporting branded aligned retailers and foodservice customers. Concurrently brand evolved from the domain of manufacturers' product brands to a complex construct integral to wholesalers' business models. These changes happened in concert with multiple changes across multiple levels of analysis and fluidity in industry boundaries. This narrative explores the evolution of this industry with emphasis on the presence, management and agency of brand across the industry value chain from the Post War years until 2011[20].

4.4 THE INDUSTRY TODAY

Wholesale grocery is a concentrated professionally managed industry with Musgrave Group Plc and BWG Foods Ltd accounting for 80% of the market[21]. They distribute grocery products (see Appendix B) to a customer base of grocery and TSN retailers and foodservice organizations. Distribution is generally centralized through large-scale warehouses managed through sophisticated ICT systems. The grocery value chain includes suppliers, wholesalers, retailers, caterers and consumers. Leading wholesalers perceive themselves as retailers with a direct relationship with consumers in addition to servicing B2B customers[22].

The grocery market is dominated by vertically integrated multiples[23] and voluntary group retailers or symbols[24] operated by wholesalers. Symbol group stores range from large supermarkets to small convenience stores owned by independent retailers with one or more stores operating under one or more brands[25]. There are three archetypal wholesaler-retailer relationships: (1) retail partnerships with high levels of support requiring high retailer buying loyalty; (2) symbol partnerships with low levels of support and flexible loyalty requirements; (3) transactional relationships. Partner-based stores are branded physically and experientially and carry the symbol's own brand[26] products in addition to generic products and proprietary brands. Quality standards are high driven by consumer demand and legislation. Symbols and multiples are supported by high levels of marketing and marcoms with most consumers unaware of differences in ownership structure[27]. Consumers perceive symbols as more expensive than multiples or discounters.

4.4.1 Industry Composition

In 2006 the Competition Authority estimated grocery wholesaler turnover at €4.7bn[28] and reported in 2009 that over 95% of turnover was concentrated in five companies: Musgraves; BWG; Stonehouse Marketing; ADM Londis; and the Barry Group[29]. In 2010 there were 93 wholesale outlets[30] and estimated sales per employee were €877,000[31]. Wholesalers stocked up to 60,000 stock keeping units. Table 4-1 shows a breakdown of grocery outlets and Table 4-2 the market

share of major retail brands in 2010[32]. Foodservice is fragmented across grocery and specialist wholesalers, its turnover was €4.74bn in 2009[33] with 56 distributors active in 2010[34]. Table 4-3 shows the structure of foodservice outlets. Foodservice forms an important element in symbol retailers' business and retail brands lead the Quick Service restaurants (QSR) market (Table 4-4).

Retail Channel	Outlets
Independents (including TSN and forecourts)	4381
Symbols (including forecourts with symbol)	1771
Multiples (Excluding Supervalu)	259
Discounters	197
Total Retail Outlets	6608

Table 4-1 Grocery Retail Outlets[35]

Retail Format	Brand	Market Share
Multiple Grocers	Tesco	27%
	Dunnes Stores	23%
	Superquinn	6%
	Others	2%
Multiple Discounters	Aldi	4%
	Lidl	6%
Total Multiples		68%
Symbol Groups	Supervalu	20%
	Other symbol brands	5%
Total Symbols		25%
Independents		7%

Table 4-2 Retail Market Shares[36]

Foodservice Channels	Outlets	Market Share
Quick Service Restaurants (QSR)	3018	
Full Service Restaurants (FSR)	2631	
Pubs / Coffee Shops	5900	
Hotels	1050	
Total Commercial Catering	12599	88%
Business and Industry	1416	
Health (Hospitals)	134	
Total Institutional Catering	1550	12%

Table 4-3 Foodservice Outlets 2009[37]

The supply side is fragmented with 526 grocery products suppliers listed in 2010[38]. This excludes local suppliers servicing independents and overseas suppliers. Distribution of international brands is increasingly by-passing Irish subsidiaries and agents whilst Irish-based brand distributors are consolidating for scale and power.

QSR Brand	Market Share
Centra	10.2%
SPAR	9.9%
McDonalds	8.8%
Londis	7.7%
Supermac's	4.6%
Other chains	26.8%
Independents	32.0%

Table 4-4 QSR Leading Brands in Sector 2009[39]

The industry is subject to high levels of scrutiny from politicians determined to deliver competitive food prices, maintain high levels of food safety, control retail wages and maintain a domestic food industry. Competition is controlled through the Competition Acts 2002-2010 and the Planning Directives (1998 and 2001). Wholesalers share trade representation with the multiples through organizations such as the Irish Business and Employers' Confederation (IBEC).

4.4.2 Branding in the Industry Today

Grocery brands encompass: proprietary supplier brands, retail and trading brands; corporate brands; employer and internal brands. Wholesalers are starting to perceive brand as an organizing principle, branding decisions are explicit and at board level and branding capabilities valued. Consumer affinity with proprietary brands is challenged by financial constraints and brand sophistication. Own brand market share increased to 35% in 2011[40] and proprietary brands are most likely to retain share in categories perceived as high risk (see Appendix G). There is a move towards own brand in valuable categories (see Appendix H) and innovations are launched through own brand. The guarantor of quality has moved to retailers' brands including symbol group brands (over 20 in 2010), cash and carry and foodservice trading brands, and own brand or exclusive brands products. Wholesalers' corporate brands communicate buying power to customers and suppliers and are used for engaging with government, shareholders and the media. Employer and internal branding is evident particularly in Musgraves.

Advertising spend on retail brands peaked in 2008 at €85 million falling 25% in the following two years[41]. Over 300 grocery retail advertisers were active between 2007 and 2011 with 85% share of voice (SOV) supporting multiples' brands including Supervalu, Musgrave's voluntary multiple symbol (see Table 4-5). Within the convenience sector no brand has more than 4% SOV and Centra (Musgraves) and SPAR (BWG) have higher SOV than other brands (See Table 4-6). In addition to advertising firms engage in other marcoms and brand building activities including PR, CSR, sponsorships and digital campaigns. Some wholesalers run internal brand programmes.

Advertiser	SOV
Tesco	24%
Dunnes Stores	19%
Lidl	10%
Aldi	6%
Superquinn	4%
Total Multiples	63%
Supervalu	22%
Other symbol retailers	12%
Total symbol retailers	34%

Table 4-5 Share of Voice 2007-2011[42]

	SOV	Share of Convenience
Supervalu	22%	
Centra	4%	34%
Daybreak	<1%	2%
Total Musgrave	26%	36%
Spar (including EuroSpar)	4%	36%
Mace	1%	8%
XL	<1%	1%
Total BWG	5%	45%
Londis	1%	11%
Costcutter	<1%	7%
Gala	<1%	2%

Table 4-6 Share of Voice Symbol Retailers 2007-2011[43]

Brands are described as *"the biggest asset we have"*[44] yet their value is only beginning to be understood and integrated into businesses' strategic management. Brand portfolios are perceived as having intrinsic value but their monetary value is neither measured nor recorded on balance sheets. The complexity of the business model, the fact that the wholesaler owns the brand and not its delivery complicates the mechanism by which brand value is evaluated. Some retail brands are franchised by wholesalers confusing attribution of value. Retail brand equity is measured by tracking their tangible and intangible attributes. Brand dictated criteria are interwoven with marketing metrics to create an understanding of brand profitability and inform the business planning process. The equity of retail brands at the B2B level does not appear to be measured and corporate reputation is not linked to corporate brand equity.

4.5 THE END OF THE OLD ORDER—1945 -1967

Having reviewed the shape of the contemporary industry and brand practice this narrative moves back in time to track their evolution. In the years after the Second World War Irish manufacturers increased production, trade barriers fell and international suppliers appointed agents[45]. Wholesalers dominated grocery distribution and the industry was inefficient, lacking professional management

or marketing capability[46]. Wholesalers identified themselves as distributors of manufacturers' brands which were understood as products. Own brand was limited in scope and distribution[47]. At the end of the 1950s a series of forces precipitated changes throughout the grocery sector changing the structure of the wholesale industry and the nature and role of brand.

In the mid-1950s grocery chains[48] began by-passing wholesalers and buying from suppliers. Advertising increased [49] using newspapers, posters and sponsored radio advertising[50] to stimulate housewives' demand for brands[51]. This generated the consumer pull necessary for self-service shopping and compelled wholesalers and retailers to stock brands[52]. The retail cooperative ADM helped retailers by-pass wholesalers, and a retailers' cooperative wholesaler, Merchants National Cooperative (MNC) established by the Retail Grocery, Dairy and Allied Trades' Association (RGDATA) in 1956 attracted over 800 members within a year[53]. Government concern about escalating food prices grew and in 1955 a limited requirement for retailers to display prices was introduced[54]. A Fair Trade Commission (FTC) inquiry into grocery distribution recommended resale price maintenance (RPM) be abolished[55] and manufacturer pricing policies be predicated on volume not function so manufacturer discount structures were extended to larger retailers and co-ops[56]. Members of two existing trade associations[57] joined together to form the Irish Wholesale Grocers Association (IWGA) to resist the removal of RPM and protect wholesaler terms. However collective action failed to maintain price differentials and individually wholesalers lacked the scale to negotiate effectively with powerful manufacturers.

By 1958 wholesale grocers were under severe pressure. The repeal of RPM[58] opened the way for retailer price competition and consumers were becoming more affluent, urban and mobile through car ownership[59] and improved public transport. This enabled them to by-pass local shops in search of value[60]. The small grocers that wholesalers relied on lacked the capital and skills to convert to self-service and closed at "*an alarming rate*"[61]. Progressive wholesalers realised they had to change to survive and start thinking about retailers' needs[62].

4.5.1 Industry Recipe - 1950 to 1960

Retail grocery was fragmented with 16,853 outlets in 1956[63], small[64], predominantly counter service[65], family run[66], with only 1.7% of shops belonging to chains[67]. Standards were diverse and Hugh McKeown recalls:

> *"In those days you took the retailer as you found him. Dirty, clean, small, big, parking or not, whatever, that is what he was. You went in and got him to take from you as much as possible got him to pay and that was your job done."*[68]

Wholesalers saw retailers as their customers with no responsibility to develop the retail sector or understand consumers[69]. Industry boundaries were clear—wholesalers supplied ambient grocery products to grocers who did not sell fruit and vegetables or meat. Purchases from wholesaler accounted for 75% of ambient grocery sales but only 30% of retailer requirements[70] as higher

margin fresh foods and other categories were supplied by specialists[71]. Many non-food categories were restricted to chemists and hardware retailers although suppliers were reviewing this policy[72]. Wholesalers had numerous customers, orders were generally small[73], retailers habitually dealt with two or more wholesalers[74], and orders were delivered on credit to retailers. In addition wholesalers invested in B2B advertising and building corporate reputations[75].

Retailers' space was restricted limiting stock to 600 - 800 products consisting of the leading brand and perhaps one other[76]. Pre-packaged goods were replacing bulk, product innovation was putting pressure on shelf-space, brand and other aspects of marketing, removed the requirement for traditional retailer skills[77] while housewives demanded retailers carry advertised brands. Grocers did not display prices to customers[78] and branded manufacturers could advertise price directly to consumers. This changed with the introduction of mandatory price display and the repeal of RPM. The impact was fast and by 1959 pressure from supermarkets forced retailers to ask RGDATA for price promotional material[79]. In 1959 H. Williams opened a large cash-based supermarket[80] and Dunnes Stores followed in 1960[81], the vanguard of vertically-integrated multiples. They saw that shelf-space gave them power to negotiate with suppliers[82].

Manufacturers supported the transition to pre-packaged products[83] produced in Ireland or imported by agents with brand exclusivity[84]. Suppliers engaged wholesalers through trade advertising[85] and sales representatives, relying on wholesalers and consumer advertising to pull products through retail[86]. Suppliers called on large retailers competing directly with wholesalers for sales[87]. Own brands were limited with the exception of luxury retailer brands and tea. In 1958 Musgrave Tea broke onto the Dublin market and grew to 15% market share[88]. They utilised their packaging equipment to pre-pack other commodities which they distributed under the Musgraves brand[89] although this was not viewed as strategically important. With adequate supply product suppliers' focus moved to inter-brand competition and stimulating consumer demand through marketing[90]. Branded manufacturers were powerful in the channel and leveraged this to erode wholesalers' and retailers' ability to influence consumer choice[91]. Jacobs appointed Gordon Lambert as Marketing Director in 1958, the first Irish company taking marketing seriously[92]. Advertising agencies were increasing their scale and influence[93] and with the arrival of commercial television in Northern Ireland (NI) suppliers had another way of engaging consumers[94].

Visionary leaders saw the importance of mergers and alliances in industry survival[95]. These included Jack Musgrave (Musgrave Brothers) and David Tyndall (D. Tyndall & Sons) who started transforming their businesses into national operations. Looking abroad for solutions to the emerging industry crisis two solutions emerged: voluntary group trading and cash and carry wholesaling. Both emerged in Ireland 1960[96].

4.5.2 The Start of Voluntary Group Trading (1960-1967).

Voluntary group trading is an alliance between non-competing wholesalers who form a voluntary group which uses a common symbol (brand) and services from a central office[97]. These alliances have greater buying power and pass on price reductions to retailers enabling them to compete with supermarkets. Marketing concentration enables efficient development of marketing activity and brand awareness through media campaigns funded by members' contributions. Central offices provide retailer services such as store quality standards and staff training. Voluntary groups emerged quickly, 13 by 1964, 38 by 1967 accounting for 63.4% of wholesale grocery turnover[98].

Multiple retailers offered a convenient form of shopping—self-service, transparent pricing and a wide product range. Dunnes Stores, Five Star, Superquinn, H. Williams and Quinnsworth[99] opened self-service supermarkets. They realised the need to communicate with consumers and competed intensely on price. This put pressure on suppliers to provide value through discounts, free stock and promotions[100]. Multiples started to stock fresh food, drinks and non-food products while wider penetration of refrigerators drove demand for chilled and frozen foods. Musgrave Provisions (later Musgrave Frozen Foods) was formed in 1966 to enable Musgraves to deliver branded frozen foods to multiples[101].

4.5.2.1 The Early Groups

Voluntary group trading started in 1960 with the establishment of Efficient Distribution Ltd (EDL) a loose affiliation of 34 IGWA wholesalers. Any retailer who wished to join was admitted. The group developed the Golden Goose symbol as an addition to retail fascias, sub-ordinate to the store name[102]. There was little attempt to brand build but *"for the first time wholesalers came together accepting ...the need to promote to the public... and they produced posters which wholesalers provided to retailers"*[103]. Buying economies were achieved but lack of retailer buying discipline was endemic and it remained more of a buying group than a retail proposition.

Musgraves broke away from Golden Goose seeing the benefits of a more structured, franchised model[104]. Having explored many franchises for their voluntary group they chose VG and bought the franchise for the island of Ireland for £1[105]. In 1962 VG was established in Munster and Musgraves looked to affiliate with regional wholesalers to leverage their franchise. Carton Brothers took the franchise for the East Coast, but left when VG opened a central office in Dublin in 1965 when Niland's of Drogheda took the franchise. Garvey's of Galway was the West of Ireland partner. Initially persuading retailers to join VG was challenging. They saw its benefit in facilitating conversion to self-service but valued their independence and were suspicious of wholesalers[106]. Arthur Creighton sold the VG concept to Musgraves' best retailers and Pat Hickey was recruited to attract larger retailers. VG required more member discipline than Golden Goose and with Musgrave's support started to develop the retail environment of member's stores.

EDL approached SPAR but were told that there were too many of them, and that they required modern warehousing and discipline to run a SPAR operation[107]. Tyndall merged his business with two Dublin wholesalers to form Amalgamated Wholesalers Ltd (AWL) while in Cork Munster United Merchants (MUM) was formed by the merger of three wholesalers[108]. In alliance with Looney Brothers of Limerick they secured SPAR[109] and launched in 1963[110]. It was the first symbol with near national coverage. SPAR's branding was an illuminated sign hung in the window, an approach retained through the 1960s[111].

Michael Campbell observed the speed of the adoption of symbol retailing:

> *"It didn't take place over 15 years but within about 4 years. Once one wholesaler got a franchise, the other said I'd better do this and they went and got one. It was the right thing to do. You had an explosion of franchises"*[112].

Through alliances or mergers wholesalers secured franchises. For example: five EDL wholesalers launched Mace; Carton Brothers launched Piggybank; and 14 wholesalers launched Max Value (see Table 4-7). By 1964 477 retailers were members of groups growing to 1,402 by 1967. These groups had limited contracts[113] and competed to attract retailers. Consumers began to shop by *"name"*[114] and wholesalers saw the value of retaining retailers with fascias and retail support while generating consumer loyalty and margin through own brand.

Symbol	Symbol Operator	Launched
Centra	EDL	1963
Golden Goose	EDL	1960
Mace	Mace Marketing Services	1962
Max Value	NWGA	1966
Piggybank	Carton Brothers	1966
Shoprite	IMD	1966*
SPAR	SPAR	1963
VG	IMD	1962
Vivo	Mangans	1963

Table 4-7 Symbol Group Brands 1960-1966[115]

The success of voluntary groups led to innovation in distribution facilities. At Tramore Road, Cork Musgraves built a 15,000 sq. ft. warehouse which the Minister for Finance, Jack Lynch opened in 1966. Wholesalers began to invest in retailers' stores to drive change and sustain retail channels[116].

4.5.2.2 Requirement for Marketing Capability

Supermarket launches were news and politicians attended openings attracting media attention[117]. Symbol stores were not newsworthy and were perceived as expensive. The wholesalers lacked the marketing expertise to address this. Despite most practitioners preferring careers in fast moving consumer goods (FMCG) or advertising[118] the central offices recruited marketers with brand

experience such as Bruce Carswell[119] representing an investment in the company's future development. They knew they had leverage with brand suppliers who needed national distribution to make advertising investment efficient. In return for distribution the groups negotiated brand promotions and additional margin[120]. They built an understanding that suppliers would not sell directly to wholesalers' customers. Advertising agencies created imagery for symbol brands and marketers initiated consumer market research. This showed that seeing a symbol over the door reassured on price and identified symbols as progressive shops. But it also identified a lack of differentiation between the symbols[121]. Advertising attracted retailers to join and increased the group's credibility with suppliers. The groups created marketing tools such as the PLOF pages, increasingly funded by suppliers[122]. As groups' geographic reach grew the risk of intra-group competition increased and groups also wanted to retain those retailers rejecting the controls of group trading. VG were the first organization to operate a dual branding strategy introducing the Shoprite symbol which operated through cash and carries[123].

The groups' scale helped them negotiate own brand contracts significantly reducing purchasing costs[124]. These were often of a poor quality to achieve required price points. Manufacturers with leading brands resisted supplying own brand, but for others it offered a way to increase production efficiencies and offset pressure on shelf-space[125]. Different own brand strategies were employed but the wholesaler name was not used for retail own brand. However Musgraves Tea became perceived as competitive by nationally focused groups who refused to stock it[126] precipitating a joint venture with Brooke Bond Tea in 1964 to distribute the PG Tips brand[127].

4.5.3 The Introduction of Cash and Carry

The cash and carry strategy encouraged retailers to self-select, pay cash and transport their orders. In return for reduced service wholesalers passed on cost savings enabling many retailers to stay viable. Targeted at smaller retailers Musgraves launched Ireland's first cash and carry in Cork in 1960. Its business model and low costs of converting to cash and carry ensured other wholesalers followed. Unlike group retailing territories for cash and carry were not exclusive, enabling geographic expansion. Seeing an opportunity to attract non-affiliated retailers EDL launched the Centra symbol in 1963[128], repositioning Golden Goose for cash and carry customers. Cash and carry increased suppliers' reliance on wholesalers who pressured them to merchandise brands and create point of sale material[129]. With the removal of the need to call on group stores suppliers' influence over the brands stocked in retailers decreased. In contrast the requirement for the wholesalers to develop effective B2B marketing tools for cash and carries required the recruitment of specialists, a role sometimes covered by voluntary group offices. The space in cash and carries created opportunities for suppliers of non-food and specialist food categories[130] increasing the size of customer transactions[131]. An unplanned emergent result of cash and carry was new types of customer—pubs, small hotels, caterers etc.— the seeds of the foodservice business.

4.6 PRICE WARS AND THE RISE OF THE MULTIPLES (1967-1979)

The late 1960s and 1970s saw dramatic change for grocery distribution and brands. Successive governments attempted to maintain competition within food distribution through the Groceries Orders (see Appendix I for the evolution of the Grocery Orders). Decimalization in 1971, liberalization of trade barriers following accession to the EEC in 1973, and rampant inflation resulting from the 1974 Oil Crisis were amongst myriad factors that undermined consumers' relationships with grocery shopping and with the branded products at the core of the Groceries Order. The multiples[132] drove much of this change innovating with practices learnt abroad in technology, buying, marcoms and branding, own brand strategies and discounting. Pressure on independent retailers intensified forcing many to close or seek the support of a retailer cooperative or wholesaler symbol group.

The early success of symbol retailing and cash and carry wholesaling were the basis for wholesalers' strategies to survive the multiples' onslaught. A feature of this period is wholesaler consolidation. Group alliances continued to form for group trading but these started to merge into larger groups. Wholesalers lobbied for a wholesale differential in recognition of the services and distributive cost efficiencies they provided suppliers relative to multiples. Despite acknowledging the value of these services[133] and new services, particularly central billing[134], the FTC persisted in rejecting their argument[135] until collective action from 1978 forced it onto the suppliers.

The consolidation of wholesalers and growth of multiples created pressures on suppliers. They fought to retain the primacy of their brands, launched new brands and brand extensions, and developed advertising and marketing campaigns to maintain brand equity. They negotiated hard with increasingly tough buyers. Acceptance of own brand created a lifeline for manufacturers with weaker brands or lacking the resources to retain shelf-space. However, this was also a mechanism by which buyers' exerted pressure on manufacturers impacting their profitability.

4.6.1 The Industry Recipe 1967 - 1979

"The 1970s were cruel" and change happened fast[136]. Although cash and carries outlets increased, wholesaler numbers fell. Furthermore they were serving independent retailers with a declining market share (Table 4-8 and Table 4-9)[137].

	1966	1971	1973	1977	1978
Total Wholesale Outlets	222	218	-	191	-
Cash and Carry Outlets	-	-	98	-	116
Retailers	13818	11988	-	13775	-

Table 4-8 Changes in the Number of Wholesale and Retail Outlets 1966-1978[138]

Retail Format	1969	1979
Multiples	32%	44%
Symbol Groups	38%	31%
Independents	30%	25%

Table 4-9 Changes in Grocery Retail Market Share 1970 -1980[139]

Wholesale groups formed a locus for consolidation as wholesalers chose to sell[140]. Progressive firms like Musgrave and AWL saw strategic reasons for consolidation. For example, Musgraves new managing director Hugh MacKeown[141] saw the acquisition of Smith Stores, a leading catering supplier, as part of their diversification into foodservice[142]. Mangans joined Mace[143] and then Golden Goose and Mace merged to form Associated National Distributors (AND)[144]. By 1971 there were five wholesale groups and 92% of symbol retailers were aligned to the largest three: SPAR (320 outlets); VG (287 outlets) and Mace (510 outlets) [145-146]. This was facilitated through attracting buying and marketing talent and employing agencies to build brands. Their increasingly professional management adopted many of the multiples' negotiating practices. However without the authority to mandate retail prices or store standards they were unable to maximise the efficiencies of national advertising.

By 1975 the strategy of the voluntary groups was driving wholesalers' power. To augment their value proposition most groups developed basic own brand ranges (Table 4-10) and whilst the leaders started to evolve into retail brands others remained fascias. As Peter Kealy observed:

> *"A fascia is over a door. If there is not much else connected to that fascia then it is just a fascia. If I have A&O over the door but inside I have no own brands or exclusive ideas and if I took down that A&O and put up PiggyBank and you saw no difference inside then that is a fascia"*[147].

Symbol	Wholesale Group	Own Brand	Operated
A&O	NWGA/ A&O Ireland	A&O / SL	1972-1985
Centra	EDL	Merrion	1963-1968*
Londis	ADM Londis	Londis	1970 -
MNC	MNC	MNC	1956 - 1986
Mace	Mace - AND	Mace / Maytree	1962 -
Max Value	NWGA	-	1966 - 1972
Piggybank	Carton Brothers	-	1966 - 1978
Shoprite	IMD	Fanfare	1960s - 1980
SPAR	SPAR / BWG	SPAR	1963 -
VG	IMD	VG	1962 - 1982

Table 4-10 Symbol Group Brands 1966-1980[148]

In 1970 over 50% of the wholesalers' business was through non-affiliated retailers[149]. With low barriers to entry and high cash flow, cash and carry was attractive and profitable for wholesalers.

Led by Musgraves[150] wholesalers invested in large cash and carries carrying an expanding range for an evolving customer base. They were branded propositions supported by marketing.

In the 1970s Musgraves consolidated to focus on wholesaling, selling non-core assets[151]. VG Central Office became Irish Modern Distributors (IMD) to reflect its expanded scope in cash and carry promotions and Fanfare own brand[152]. Musgraves second cash and carry opened in Dublin in 1972, the launch a major PR event for an organization previously relatively unknown outside Munster. In 1973 AWL became part of a conglomerate, the Brooks Watson Group (BWG). AWL joined believing the other SPAR partners would follow, and this theory proved correct. BWG acquired the three remaining SPAR wholesalers amalgamating them into the BWG Food Division facilitating the development of the SPAR brand[153]. In 1978 BWG acquired Carton Brothers wholesale interests including the Piggybank fascia[154].

The 'Sauce Wars' of 1965[155] was a precursor to the type of brand competition that dominated the 1970s. Multiples used intense, targeted price reductions on 'must-have' brands to position their retail brand. They employed tactics such as below cost selling, below cost advertising and secretive[156] negotiating tactics to secure supply below the wholesale price placing small retailers at *"grave competitive disadvantage"*[157]. A ban on below cost advertising introduced in 1972 did little to address these practices due to ambiguity around the cost of goods[158]. The increasing size of the supermarkets facilitated expansion into food and non-food items not covered by the Groceries Order. Despite independents' rapid conversion to self-service the growing attraction of these nationally advertised supermarket brands were inexorable.

With the demise of the IWGA in 1964 wholesale industry representation faltered. It was not until 1979 with the formation of the Irish Association of Distributive Trades (IADT) that a potent representative force re-emerged. Working closely with RGDATA they appreciated that the battle that must be won by wholesalers was not only for better supplier terms but for legitimacy as defenders of consumer choice. This realisation drove change in wholesalers who saw the opportunity to become conduits through which independents could compete by winning consumers' trust. Nationally advertised brands and relationships with grocers had guaranteed quality for housewives[159] but new forms of shopping challenged the bond with grocers. The multiples and symbols fought to create trusted retail brands. They developed distinctive price positionings, addressed in-store standards, and advertised extensively. The symbols were unable to match the prices or marcoms expenditure of multiples who used their strength in Dublin to create *"sometimes invidious"* price comparisons with neighbourhood stores[160]. But the symbols could leverage their local ownership as a basis for trust. For example, VG created a TV campaign to reassure customers during decimalization.

4.6.2 The Rise of Powerful Retailers

In 1972 the FTC observed that the increase in multiples was *"the most striking development in the retail trade since the last enquiry"*[161]. They adopted aggressive expansion programmes consolidating their dominance in Dublin and moving into towns around Ireland. They innovated with buying practices and initiated price wars. There were new entrants, consolidations and liquidations and by 1979 there were 155 multiple outlets[162]. Multiples extended their fresh foods range which delivered higher margins than the ambient products the wholesalers depended on [163] and extended non-food offerings. In-store environments improved, own brand ranges became more extensive, and promotional and marcoms activity intensified. As a result distinct retailer brands emerged (Table 4-11).

Multiple	Own Brand	Operated
Dunnes Stores	St Bernard	Throughout period
Findlaters	-	Liquidated in 1969
Five Star	Five Star	Acquired by Quinnsworth 1979
L&N	L&N	Throughout period
Liptons	-	Liquidated in 1976
P.Q. Stores	-	Formed by Quinnsworth 1978
Quinnsworth	Quinnsworth	Bought from Pat Quinn by ABF Weston 1972
Roches Stores	-	Throughout period
Superquinn	-	Throughout period
Tesco	Tesco	From 1979 initially as 3 Guys
3 Guys	-	1977-1979 (acquired by Tesco)
H.Williams	HW	Throughout period

Table 4-11 Multiple Retailers 1967-1979[164]

The ability to retail a range of branded products competitively was central to creating competitive advantage. The price war strategy was to promote a rolling selection of critical brands below retail cost. Overall margin was achieved through the prices charged on the balance of the shop. The multiples realised the inimitable importance of shelf-space to suppliers and exploited this to extract discounts, advertising allowances and merchandising. Although a code to control shelf-loading was introduced in 1970 and below cost advertising outside stores banned in 1972[165], multiples circumvented these constraints[166]. To manage retailer demands suppliers diverted marcoms resources to price promotions thereby increasing retailers' effective SOV.

In 1977 Albert Gubay's 3 Guys chain brought deep discount retailing to Ireland[167]. He was adept at managing the media even using RTE's flagship Late Late Show to promise lower prices[168]. Quinnsworth responded by launching P.Q. Discounts in 1978[169]. Gubay sold 51% of 3 Guys to the British multiple Tesco in 1978[170] and the remainder in 1979[171]. That year in response to Quinnsworth's takeover of Five Star, Austin Keenan, Restrictive Practices Examiner, opined that

"the trend toward concentration in the grocery trade could be halted by a prohibition pending [this] public enquiry...into the effects of buying power in the supply and distribution of grocery goods"[172].

4.6.3 The Wholesalers Fight Back

Realising *"buying points were power"* wholesalers employed tactics similar to the multiples. They extended their ranges into areas as diverse as white goods, toys, and wines and spirits. The success of groups attracted more retailers enabling buying groups to demand minimum store, purchasing and marketing standards. In return they increased retailer support through specialist advisors. To manage the divergent nature of the delivered and cash and carry businesses wholesale operations began to split into retail and wholesale divisions. The FTC report in 1972 observed that voluntary group trading had evolved into a *"sophisticated marketing operation* [173] yet there is little evidence that brand was integral to wholesaler strategies. Branding discussions at board level were confined to own brands[174] and they did not recognise cash and carry trading names or symbols as brands. Towards the end of this period this changed due to the success of the multiples' branding strategies.

Although wholesalers owned some symbol stores to block multiples' expansion[175] most retailers remained staunchly independent. This created problems in developing consistent retail brands across disparate operations. For the format to succeed groups had to control relationships between suppliers and retailers and force suppliers to put everything through groups. But Tim Nolan recalls *"a lot of smart alecs wanted the best of both worlds"* and offered retailers the group price[176]. LTAs and punitive actions addressed this behaviour over time. Own brand helped create differentiation and exert pressure on manufacturers who wanted to maintain distribution of proprietary brands.

The symbols' marcoms became increasingly sophisticated but research showed consumers still found it hard to differentiate them[177]. This was predicated on poor levels of physical branding as retailers gave their identity precedence over the symbol. Wholesalers and retailers failed to appreciate what constituted a brand and the pulling power of retail brands[178]. Independents' resistance to prescribed trading processes undermined the benefits of advertising. By 1978 there were concerns about the viability of symbol retailing as a profitable form of trading[179]. Progressive retailers recognised that brand had played a role in building these groups[180] but the gap between them and other retailers in their groups was widening. There was a danger that they would become vertically integrated multiples removing significant volumes of wholesalers' business.

In 1974 Musgraves announced plans for three more cash and carries—Dublin, Limerick, and a replacement in Cork—taking their floor space to 25% of the country's cash and carry space[181]. The SPAR wholesalers launched a new company Value Centre (Ireland) Ltd in 1968 creating the Value Centre brand[182]. When Aidan Morrison joined BWG in 1974 he was given responsibility for its

marketing. AND/Mace created the Keencost brand for cash and carry and NWGA launched the Superite brand. By 1977 these brands were found on 102 outlets[183]. The brands were supported by wholesalers who saw them as important in reputation building with retailers and suppliers. Musgrave's first mover advantage resulted in their being acknowledged as *"the brand"* in cash and carry[184]. Expanded floor space enabled cash and carries to extend their range to attract foodservice[185], newsagents, petrol forecourts and other customers. From being wholesalers to grocery retailers, cash and carry enabled wholesalers to evolve into a broader proposition[186].

4.6.4 Branded Suppliers Face Increased Pressure

Manufacturers faced an erosion of margin and brand equity through constant price promotions on their brands. LTAs became a *"heated debate...clipping at the margin all the time"*, driving firms with less skilled negotiators or weaker brands out of business[187]. Grocery buyers found new ways to extract discounts including promotions, supply of freezers, early payment discounts, cooperative advertising and free stock for bulk deliveries[188]. Deliberations on terms of supply were conducted secretly for fear that concessions to one buyer would leak to competitors but buyers moved bringing knowledge with them[189]. Delisting was a serious threat for suppliers undermining the effectiveness of advertising and providing access for competitive brands. Buyers accepted their need to stock 'must-have' brands but withheld listings for secondary brands as a bargaining tool[190]. The Government launched a Buy Irish campaign in 1975 to encourage consumers to choose Irish goods. Marcoms and manufacturers' support ensured the Guaranteed Irish symbol became one of Ireland's best known brands[191]. The arrival of Tesco in 1978 concerned suppliers who feared they might leverage their UK buying power and import brands into Ireland[192].

Driven by relentless pressure suppliers yielded to multiple's demands for discounts threatening the future of wholesalers' businesses. This came to a head in 1978 when, led by Michael Campbell of AND/Mace, wholesalers boycotted the Willwood Group (part of Nestlé) which had a portfolio of *"fabulous brands"*[193]. With the support of RGDATA this action lasted for three months before Willwood conceded 2½-3% incremental discount[194]. The wholesalers instituted boycotts on other brand suppliers compelling them to withhold stock from multiples selling below the wholesale price as entitled under the Grocery Order[195]. The wholesalers realised that collective action was the way forward and in 1979 the IADT was formed under the leadership of Ray Burke who forced 26 leading suppliers to concede additional discounts of 1½-7½% within a year[196].

4.6.4.1 The Rise of Own Brand

In 1972 the FTC expressed concern that while own brand stimulated choice and price competition they had the potential to distort trade and undermine the brand equity[197]. The multiples and wholesalers saw own brand as a way to redress the balance of power with suppliers, enhance trading brands' reputations, and increase margins. Most manufacturers' interest remained in

proprietary brands[198] and their reaction to producing own brand ranged from rejection (Kellogg's) to slow acceptance. Brand leaders were likely to resist whereas suppliers with secondary brands saw it as a way to survive and utilise excess capacity. Own brand production was used to impede the entry of international competitors, a tactic employed by Batchelors to block Heinz Beans[199]. Bruce Carswell launched VG margarine in 1973 to send a message to Unilever when they reduced their terms on Stork to symbol retailers to match the group price. Stork was removed from VG causing their market share to fall. Carswell observed that *"it taught them a ferocious lesson. They never took us on in the same way again"*[200]. Own brand equity is built on retailer reputation and these were beginning to be strong enough to support own brand ranges.

4.6.5 The Role of the Media

The editorial content of the media influenced consumers' perception of retailers' brands and undermined the equity of proprietary brands. Consumer concern about grocery prices was heightened by decimalization[201] and the impact of inflation. Multiples' price wars received *"a good deal of publicity in the press"*[202] and the situation intensified in 1975 with the launch of a weekly 'Shopping Basket' feature on Gay Byrne's RTE morning radio show[203]. The price of a selection of brands were compared across the 'Big 5' multiples, these prices often being reported in other media. The activity was legal because it did not constitute advertising under the terms of the Order. If a brand was mentioned the supplier was *"summoned"* by competing multiples demanding the same terms[204], while wholesalers and independent retailers saw it as free advertising for multiples. In 1978 Shopping Basket was suspended when the Broadcasting Complaints Commission upheld a complaint on the basis that it amounted to free advertising for the Big 5 giving them unfair advantage[205]. Shopping Basket was relaunched and broadcast until 1985[206].

In 1975 Superquinn were prosecuted for below cost advertising and fined £30. Feargal Quinn's trial testimony was reported in the media enabling him to position his pricing strategy as in *"the best interest of the customer"*[207]. In 1976 the Irish Press reported that Superquinn and Dunnes Stores were selling USA Assorted biscuits below cost but could not advertise this as it was illegal[208]. This supports the RPC's observation that the fine imposed on Superquinn was *"trivial in relation to the value of the publicity to the firm"* and as a consequence no more prosecutions were taken until 1978[209]. In October 1979 the IADT supported by Lyons Tea and Sugar Distributors sought an injunction on 3 Guys in relation to below cost advertising. The Court upheld the injunction and ruled on an interpretation of 'net invoice price'[210]. This action demonstrated how suppliers and wholesaler supported retailers could turn media coverage to their advantage[211].

4.6.6 The Need for a New Strategy to Survive

By 1979 the multiples' success was challenging the viability of the symbol group business model. Store standards were poor relative to multiples and retailer discipline inadequate[212]. Musgraves

and BWG independently conducted market research and identified two barriers facing symbol brands. Firstly, consumers perceived two types of grocery shopping—'trolley' and 'basket' or convenience. Multiples were for trolley shops but symbols were *"trying to be all things to all men and falling down the cracks"*[213]. Secondly, the symbols were poorly differentiated but had a collective high price image[214]. Wholesalers adopted different strategies to address these issues.

IMD/Musgraves

In 1979 there were 285 VG stores ranging from 300 - 4,000 sq. ft.[215]. Retailers were losing confidence in VG and wholesalers struggled to make a profit. On a trip to the USA John Smith saw the potential for a trolley based symbol brand and convened a meeting in Killarney to explore this opportunity. The decisions made at this meeting have become part of Musgrave's folklore so pivotal was its impact on the organization[216]. Smith told Bruce Carswell, Seamus Scally, Tim Nolan and Greg Cantalon that *"if we don't look like a multiple, think like a multiple and act like a multiple then we have no future"*[217]. To achieve this they needed to replace VG with a new brand positioned as a supermarket. A new convenience brand would distance smaller retailers from VG's high price perception. The changes were approved by Musgrave's Board but the proposal to drop VG was resisted by some stakeholders[218]. Garvey's agreed to support the change but Niland's did not want to give up VG. Another barrier was the loyalty of VG retailers to 'their brand' which they believed had equity. Musgraves moved forward with the strategy and Supervalu became the supermarket brand[219] and Centra was acquired from EDL for the convenience format.

BWG

By 1979 there were 380 SPAR stores franchised by BWG[220]. Single ownership of the franchise facilitated a uniform approach to brand development but its delivery in retail was mixed. Internationally SPAR regulated the naming of retail formats and advocates of this relationship persuaded BWG management to retain the SPAR brand. This presented problems in stretching one brand to address the issues of shop format and price image. BWG's decision to stay with SPAR had long-term impact on their ability to respond to changing industry conditions[221].

AND/Mace

Although there were 343 group shops by 1979[222] only three wholesale partners remained (Punch & Co., Mangan Brothers and Lee &Co.). Retailers were loyal to the Mace brand but a lack of marketing resulted in there being no distinct strategy to evolve the Mace fascia into a brand.

4.7 A PERIOD OF TURBULENCE 1980-1987

The 1980s was a decade of instability and change in Ireland which profoundly influenced grocery distribution. A Fianna Fail government elected in 1979 fell in June 1981 and there were four general elections between 1981 and 1987— power switching between Fianna Fáil and Fine Gael /

Labour coalitions[223]. There was high inflation, peaking at 21% in 1982[224] and significant price differentials between the Republic of Ireland (ROI) and Northern Ireland (NI). Multiple price wars continued and despite widening of the prohibition on below cost advertising, below cost selling remained a weapon of choice. Successive governments reviewed the Groceries Orders with increasing focus on below cost selling (see Appendix I) but little action occurred until 1987. The demographic structure of Ireland was changing and new lifestyles emerging. The decade saw dramatic increases in 1 and 2 person homes and married women and mothers remaining in the workplace fuelling demand for convenience products, shopping solutions and out of home eating. Concerned at import levels and their impact on employment in an era of high emigration there was openness to promoting Irish products supported by the Guaranteed Irish brand[225].

Symbol and cash and carry were fundamental to wholesalers' ability to survive and grow. At the heart of this strategy was the creation of distinctive branded retail propositions. Retail brands became a determinant of how wholesalers' developed their business including resource allocation and acquisition strategies. Hugh MacKeown explained:

> *"If it was a business that didn't fit readily into what we were doing and wanted to do, then we wouldn't have bought it. So branding is in there very strongly as the basis on which you are going to develop and what you buy. In each (of those) purchases there was a brand requirement underlying them to fit in with what we were already doing...We didn't go out and buy a hardware chain because we had nothing to fit that into, so it is a question of sticking to what you are doing and developing that"*[226]

Some wholesaler-owned retail brands launched commencing with SuperValu in 1980. New types of operator engaged in the market (e.g. petrol forecourt retailers), blurring industry boundaries and causing confusion for those measuring and controlling the market[227]. Changes in market conditions demanded that wholesalers differentiated their retail brands and introduce sophisticated brand architectures. Corporate reputation was important in signalling enhanced scale of leading operators. The capabilities required to exploit new business models, whilst not explicitly recognised as brand capabilities[228], were actively developed. Musgraves were first to leverage this approach to growth which helped steer its acquisition strategy, helping transform it into a major player in the national grocery market[229].

4.7.1 Industry Recipe 1980-1987

Wholesalers understood that in addition to managing costs and efficiencies they needed to create a symbiotic relationship with retailers. This required building organizational structures around the distinctive requirements of symbol and cash and carry trading. The primary branding focus was the evolution of symbol retail brands from heterogeneous conglomerations of shops operating under a fascia to an affiliation of wholesaler and aligned independent retailers cooperating to create ubiquitous expressions of retail brands. Managing portfolios of brands required specialists who understood the complexities of sophisticated brand architectures. Senior management acceptance

of the need for brand building became a driver of consolidation within the industry. New retail technologies such as scanning, enhanced ordering, delivery and billing systems were instigated and wholesalers demanded increased compliance from retailers.

Supermarkets offered a widening range of goods including in-house bakeries, butchers, and health and beauty ranges whilst convenience stores were absorbing the business of TSNs and innovating with foodservice. Wholesalers had to become more sophisticated to manage the explosion of products required by retailers and guide retailers in range selection and merchandising particularly around new categories[230]. Travel created interest in ethnic foods and wine drinking which became part of the cash and carry offering and then a feature of symbol stores. The effect of the multiples' competitive strategies impacted independent grocers and growth in cash and carry was insufficient to offset the loss of retailer customers and market share (Table 4-12 and Table 4-13). There was growing confusion about how to classify supermarket symbol brands and what defined a multiple retailer. From 1985 Musgraves clearly positioned SuperValu as a voluntary multiple.

	1977	1983	1988
Total Wholesale Outlets	191	-	200
Cash and Carry Outlets	116*	118	121
Independents (including TSN and forecourts)	11832	9694	9387
Symbols (including forecourts with symbol)	1802	1715	1134
Multiples	141	161	149
Total Retail Outlets	13775	11570	10670

Table 4-12 Changes in the Number of Wholesale and Retail Outlets 1977 - 1988[231]

Retail Format	1980	1985	1988
Multiples	44%	63%	60%
Symbol Groups	31%	20%	21%
Independents	25%	17%	19%

Table 4-13 Changes in Grocery Retail Market Share 1980 - 1988[232]

To manage costs, increase buying power and create efficiencies the industry leaders knew they must consolidate further. Musgraves focused their acquisitions around their group partners reinforcing the strength of SuperValu, Centra, and Musgraves Cash and Carry, a strategy that informed their first operation outside of the ROI, the opening of a cash and carry in Belfast in 1983[233]. BWG similarly focused on building the SPAR and Value Centre brands. However, ownership of Mace franchises remained split and the brand lost share to its competitors.

Change and segmentation of the grocery market is reflected in the symbol brands that entered the market (Table 4-14). SuperValu was the only bespoke supermarket brand although some SPAR and Mace stores had extensive offerings. Centra was the first dedicated convenience brand, joined

later by sub-brands of existing symbols such as SPAR Eight Till Late. Brands with less differentiation and support failed to survive. Wholesalers who acquired symbol group wholesalers encouraged retailers to migrate to their primary brand or developed a dual or multi-brand strategy to maximise their coverage of the retail market[234]. There was no significant movement in cash and carry brands. Keencost continued to attract independent wholesalers while MNC outlets were absorbed into Value Centre and VG into Musgraves as a result of acquisitions.

Name	Wholesale Group	Operated
7 - 11	Local Stores Ltd*	1987 - 1991
A&O	A&O Ireland / Mangans	1972 - 1985
Centra	Musgrave	1980 -
Mace	AND - BWG - Mangans	1962 -
MNC	MNC	1956 - 1986
SPAR	BWG	1963 -
SPAR Eight Till Late	BWG	1987 - 1992
Supervalu	Musgrave	1980 -
VG	IMD	1960 -1982
Wisebuy	MNC / BWG	1982 - 1992*

Table 4-14 Symbol Group Brands 1980 - 1989[235]

Musgraves and BWG drove change whilst NWGA and AND/Mace lagged. The tough environment put pressure on both operations and their ownership structure influenced their response. Despite contemplating privatisation Musgraves remained in family ownership engendering a long-term approach to building their business. In 1983 BWG Foods were acquired by Irish Distillers who identified the increasing importance of grocery wholesaling in alcoholic drink distribution. They treated BWG as a cash cow in which they were reluctant to invest capital beyond expansion of their wholesale base to increase purchasing power[236].

Musgraves

The move from VG to SuperValu and Centra marked a fundamental change in how Musgraves operated and the focus they attributed to retailing and brand building. The trading relationship between wholesaler and retailer was reframed through the replacement of the loose VG agreements with more prescriptive contracts and the removal of the franchise fee. Musgraves would make profits from the sale of goods to retailers[237]. Musgraves invested in specialist capabilities to support retailers in delivering branded shopping experiences. While a retailer's name could remain part of the fascia, the symbol brand would take precedence within and outside the store. To facilitate these changes the retail division of Musgraves was rebranded Supervalu Centra Distribution (MSCD)[238].

Musgraves identified 27 top VG stores to spearhead SuperValu. The cost of transforming the stores was high for the retailer as was the marketing investment Musgraves made during the launch. Initially branded VG Supervalu to maintain customer loyalty, VG Supervalu opened in Gorey in June 1980[239]. VG was phased out and a distinctive SuperValu brand emerged. The Centra brand was developed for Shoprite and remaining VG retailers and this dual brand approach enabled Musgraves to retain valuable customers[240]. Musgraves built SuperValu in their Munster and South Leinster territory but for the concept to work national coverage was required. Garvey's joined SuperValu in 1980 but were unwilling to brave retailer unrest around the rebrand. Niland's remained committed to VG but lacked the capability to develop the concept and aligned with SuperValu in 1982[241]. In 1984 Musgrave's acquisition of Garvey's gave them access to the Dublin retail market and they opened the first Dublin SuperValu in 1985. Clifford's of Tralee was acquired in 1985 and in 1989 they purchased their final IMD partner Niland's, an acquisition seen as imperative in controlling the development of their retail brands[242].

The wholesale division was viewed as important for volume and cash flow but with limited requirement for brand. Musgraves developed a range of hardware products which they sold through cash and carry under the ACE brand directed by Bruce Carswell[243]. In 1987 they launched a voluntary hardware group called ACE Hardware but this venture failed and the brand was discontinued[244]. Within MSCD separate marketing, sales and retail support teams were established to manage each brand and ensure that retailers were resourced to deliver the high standards that consumers expected from multiples[245]. Brands became the responsibility of divisional management but their operational scope was the preserve of marketing and buying[246]. When the opportunity to step-change their presence in Dublin presented in 1987 Musgrave's experience around the SuperValu brand facilitated their ability to move forward.

BWG

BWG's 1980 acquisition of Lee & Co included the Mace franchise for Leinster and a decision was made to retain the brand and migrate cash and carry into Value Centre. This established a pattern that persisted: single brand cash and carry and multi-brand architecture for symbols. Cash and carry was strategically important and the Value Centre brand was managed from the wholesale division. When MNC was acquired in 1983 their 200 retail stores were not uniformly branded nor up to the standard demanded for SPAR. Morrison explained that *"their advertising featured a wise owl so we decided to brand the shops Wisebuy with the owl as the symbol"*[247].

Tyndall retired in 1983 and Dennis Allman became CEO. Although BWG built a significant drinks business Irish Distillers had acquired a business facing a *"free-fall decline in store numbers and turnover"* and considered withdrawing from retailing and remaining in cash and carry[248]. A decision was made to remain in retail and SPAR was repositioned as an *"upmarket chain of*

strongly branded local stores and supermarkets focused on convenience" under the direction of Gordon Campbell[249]. Stores were upgraded and investment made in creating a new approach to advertising. Around 1982 McConnells Advertising, regarded by Morrison as *"the most analytical agency I had come across"* identified TV as necessary for the brand relaunch . They took the iconic SPAR tree device and created a corporate campaign *Under the Tree at SPAR* which proved enduring and effective[250]. Wisebuy investment was restricted to promotions and retailer support and BWG selectively invited retailers to join SPAR. Committed to developing a convenience brand BWG adopted SPAR Eight Till Late targeting urban consumers.

4.7.2 The Fight for Power - Political Action by the Wholesalers

Between 1977 and 1983 over 2,000 grocery retail outlets closed posing a threat to the wholesale sector. The battlegrounds of their war of survival were: limiting the expansion of the multiples; maintaining a wholesale differential from branded suppliers; and fighting for a ban on below cost selling. This sectoral war was directed by the IADT. The first opponent was the multiples. Their competitive focus was other multiples but their activities heightened poor price perceptions of independents' brands. To maintain their intra-sector fight multiples instigated new own brand strategies even introducing distinctive value retail brands to sustain market share (Table 4-15).

Multiple	Own Brand	Own Brand products 1987	Operated
Crazy Prices	Yellow Pack / KVI	na	1986 - 1997
Dunnes Stores	St Bernard	400	Throughout period
Giant Trading Company		na	1987 -1988
L&N	L&N	25	Throughout period
Quinnsworth	Yellow Pack / KVI	220	Throughout period
Roches Stores	-	6	Throughout period
Superquinn	Thrift	60+	Throughout period
Tesco	Tesco	na	Withdrew 1986
H.Williams	Hafners / HW	40	Liquidated 1987

Table 4-15 Multiple Retailers 1980-1989[251]

IADT chief executive Ray Burke announced proposals to curb the multiples growth in 1980[252] and in concert with RGDATA initiated a programme of lobbying and PR. Michael Campbell, who succeeded Burke in 1983[253], recalls that *"lobbying was new to us... we learnt PR on the job too"*[254]. The IADT positioned their campaign as being in defence of the Irish way of life and used local retailers to canvas politicians (under constant threat of elections).

> *"We discovered that grocers... like doctors ... have power beyond their numbers for two reasons. One they are throughout the country so they are into the TD's back garden, secondly they are influencers. Every grocer has 400 or 500 people through a day... and ...we had ... about 3,000 or 4,000 retailers"*[255]

In March 1981 over 300 grocers marched on the Dail where Hugh MacKeown (Chairman IADT) observed that the decision by Fianna Fáil not to ban below cost selling was an *"open invitation to multinational supermarket chains to take control of the Irish Grocery market"*[256]. IADT lobbying helped bring about The Local Government (Planning & Development) General Policy Directive (1982) which controlled the development of shopping centres that were driving customers away from the wholesalers' customer base. In 1984 the IADT and RGDATA merged.

The IADT put pressure on brand owners to withhold brands from multiples selling below cost. Suppliers were caught between the threat of delisting by multiples if they refused to reduce prices, the threat of parallel importing and the threat of boycott from wholesaler supported retailers. Suppliers co-operated by criticising below cost selling practices which were damaging their brand equity and margins[257]. Even companies with strong brands faced delisting as illustrated by the case of Kellogg's. In 1982 Burke wrote an open letter to the President of Kellogg's outlining the lack of action by Irish and UK management to stop multiples selling their cereals below cost[258]. Despite a 70% market share Kellogg's were delisted from Dunnes in 1983 when they withheld stock[259]. That same year the IADT took Kellogg's to court under Articles 85 and 86 of the Treaty of Rome[260] with Tesco being cited for exerting pressure on Kellogg's by threatening to import from the UK[261].

Independent retailers also battled for power with the wholesalers. This struggle was around the buying control symbol group operators imposed. Wholesaler sales teams fought to maintain a customer base tied by short-term contracts through selling the benefits of the business model. But many retailers were unprepared to accept this discipline and remained cash and carry customers.

4.7.3 Austerity and Own Brand

Although proprietary brands retained their emotional hold over consumers the hunt for value influenced customer's choice of retailer making own brand strategy critical in managing total basket costs. In addition to own brand so-called generic ranges inundated the market. Superquinn moved first with Thrift in 1982 prompting Quinnsworth to launch Yellow Pack. Generics impacted the relative price perception of symbols and independents prompting a reaction from wholesalers. Table 4-16 shows the extent of wholesaler own brand and generic retailer ranges and this trend also occurred in wholesaling divisions. Brands were created for food, drink, catering and non-food categories increasing the complexity of inventory control, trade mark management and putting pressure on buying and marketing resources. The impact of generics should not be over-estimated. Their role was important in the evolution of segmented own brand strategies and as a mechanism to engage in below cost selling with little risk of stock being withheld[262]. Own brand maintained pressure on manufacturers driving out 2nd and 3rd ranking brands with less impact on brand leaders. However a submission from a leading soft drinks supplier to the RPC in 1986 stated that *"... the unbridled activity of [selling] generics at quite unsustainable pricing has been to the detriment of*

the branded goods sector who in the first place provided the dynamism that fuels growth in the market"[263]. Following the ban in below cost selling in 1987 which included own brand Dunnes maintained their emphasis on own brand while the other retailers refocused on branded goods[264].

	Brand Owner
Own Brands	
A&O	A&O
Centra	Musgrave
Family Value	BWG
Fanfare	VG
Homestead	NWGA
Mace	AND/Mace
Maytree	AND/Mace
MNC	MNC
Moneywise	AND/Mace
Shop Local	AND/Mace
SPAR	BWG
Superite	NWGA
Supervalu	Musgrave
Wisebuy	MNC - BWG
Generics	
Blue Label	Nilands and Garveys
Our Brand	BWG
Red Label	Musgraves
SL	A&O
Top Value	NWGA

Table 4-16 Own Brand and Generics in the wholesale sector 1980-1987[265]

4.7.4 A Period of Turmoil for Multiples

Throughout 1986 and 1987 a series of events unfolded with long-term impacts on grocery distribution. Tesco suffered from negative attitudes towards Britain and were perceived as putting Irish jobs at risk through import substitution. By 1986 they had 23 stores and operated a central warehouse[266]. Tesco failed to adapt to differences between Irish and British shoppers[267]. Stores were merchandised based on British shopping patterns and stories of *"shelves of canned soup in a market dominated by packet soup"*[268] is indicative of their mistakes. Their trading never reached the levels desired[269]. H. Williams purchased the share capital of Tesco (Ireland) Ltd planning to trade the stores under their brand, realise economies of scale and complement their Dublin base[270].

The prohibition on below cost advertising was effective until a High Court ruling in June 1985 raised doubts that further cases would be pursued[271]. The price wars intensified and in July 1986 the government asked the RPC to review the Groceries Order *"with particular reference to the*

issue of below cost selling"[272]. The report was published in January 1987 recommending a ban on below cost selling and 'Hello Money'[273] which were having a devastating effect on suppliers and were key considerations for the RPC who wrote:

> *"...if it is possible, by amending the Order, to eliminate some of the problems which manufacturers and suppliers have in dealing with the grocery trade, without affecting the level of competition between retailers, it would seem worthwhile to do so"*[274].

Legislation passed through the Senate but in late summer the supermarkets risked another price war believing the Minister could not prosecute until the legislation passed through the Dail[275]. Before this occurred H. Williams went bankrupt.

H. Williams had fallen behind new market leaders and in 1982 Holland Quinn Ltd took over the company and attempted to upgrade its operation. The Tesco purchase put them in a vulnerable financial position. The intensified price wars triggered the collapse of H. Williams in October 1987[276] and The Aviette Group acquired all 31 stores[277]. Musgrave bought 15 to build Supervalu in Dublin and the remainder were sold to independent retailers or retained by Aviette and traded as SuperValu. SuperValu's disciplined approach and commitment to developing the brand attracted motivated retailers. Their supermarket credentials were enforced[278] and by 1986 they had 80 outlets. The experience Musgraves built up in refining the business model meant that they were *"just ready"* to seize the opportunity presented by H. Williams's collapse[279]. Musgrave Frozen Foods distributed branded frozen foods to catering and retail outlets including multiples. Mitchel Barry joined the main Musgrave Board in 1982 and soon began to have problems with UK principals due to Musgrave's IADT activities[280]. The acquisition of H. Williams brought this to a head and Musgrave Frozen Foods began to lose sales. Nervous suppliers started to look for new representation to protect their distribution and a decision was made to sell the business.

4.7.5 The Emergence of Convenience Brands

Smaller grocery shops could not compete with the multiples and the symbol operators repositioned their stores to appeal to top-up or basket shoppers by creating distinctive convenience brands (or sub-brands). SPAR was first to introduce longer opening hours and a more bespoke range but SPAR incorporated outlets from small stores to medium sized supermarkets located in more rural areas creating challenges in determining the territory of the brand. Centra was conceived as a basket option but struggled with the same problem taking time to evolve into a true convenience brand. Garage forecourts had traditionally opened late and stocked many of the items featured by the new convenience retailers. The oil companies became interested in cooperating with wholesalers to develop symbol outlets on forecourts. As the convenience concept gained pace confectionary, snack foods and soft drinks increased in importance and when delis were moved to the front of the store their foodservice business began to grow[281]. In 1986 Peter Kealy visited an English SPAR wholesaler and saw their SPAR Eight Till Late brand which BWG adopted to break into pure convenience retailing[282]. Launched in 1987 its stores were different from a grocer with

bread baked fresh in store, a deli, wine department and limited grocery range. Opening hours were extended and there was a focus on customer service. It was a distinct brand and its innovations were later adopted across the other SPAR formats[283].

4.7.6 Internal Branding and Corporate Culture

More complex brand architectures influenced organizational structures and customer relationships but brand as an expression of corporate culture was not explicit. Culture helped deliver the company proposition through creating distinctive ways of working internally and with affiliated retailers particularly in Musgraves. Their values were built over generations and employees had to fit within the culture. Those that did not were *"managed out of the business"*[284]. People recruited from multiples to manage the expansion of SuperValu came from a culture where brand owners dictated all aspects of the business to store managers, inconsistent with Musgrave's business model and culture[285]. When reviewing the concept of divisional brands MacKeown observed that *"a particular operational philosophy determined the division... it was a business brand...a way in which we did business"*[286]. Seamus Scally describes how the *"Musgrave Way"* was quickly introduced to acquired companies directing the way they were expected to work[287].

4.8 THE EPOCH OF THE 1987 GROCERY ORDER (1987-2006)

Following the enactment of the Groceries Order (1987) wholesalers were protected from the more predatory tactics of the multiples. Wholesalers consolidated and industry concentration increased. Independent retailer numbers fell and foreign multiples entered the market. The economy became more buoyant especially during the 'Celtic Tiger' era. The influence of the EU grew, challenging governments' approach to competition and introducing the Euro in 2002. Comprehension of brand evolved changing approaches to brand management. Consumers' relationship with food changed due to prosperity, the collapse of traditional eating patterns[288] and demographic change creating demand for new foods and convenient ways of buying and consuming them with innovation increasingly coming from retailers[289]. Consumers became media savvy, sophisticated in decoding marcoms and confident in brand choices[290]. This changing relationship with brands coincided with wholesalers' increased focus on consumer understanding. Own brand marketing became sophisticated and brand a differentiator of in-store designs[291]. Food provenance was important and wholesalers used local suppliers to reinforce community positionings[292].

Although much of the industry remained in family ownership there were changes in the nature of senior managers and corporate governance. The requirement for marketing capabilities to manage multi-faceted trading brands and marcoms budgets became standard. The cash and carry and symbol formats evolved with investment in infrastructure, IT and marketing. From the mid-1990s there was renewed focus on grocers seeking entry level symbols with less exacting loyalty demands. The growing contribution of foodservice changed wholesale divisions into increasingly

credit based, delivered operations. Foodservice blurred industry boundaries making measurement of share more complex. Proprietary brands retained high levels of loyalty built on intense consumer relationships with brands[293] and protected by the ban on below cost selling. Suppliers innovated and sustained marketing support although brand distribution began to consolidate.

4.8.1 Industry Recipe (1987-2006)

Wholesalers concentrated on efficiency and growth through process innovation and expansion. Investment in floor space and distribution facilities accommodated increasing product ranges. The smaller wholesalers continued to form buying groups[294] for which they acquired symbol brands. Most had limited success and disappeared as the industry consolidated. In 2000 AND/Mace merged with NWGA to form Stonehouse Marketing. Barry's of Mallow and Mangans retained their own symbol brands[295] and the other Stonehouse members aligned around Gala Retail Services' brands. ADM Londis secured the Londis brand in1995 and converted from a cooperative to a Plc in 2005[296]. Musgraves and BWG continued their acquisition strategies targeting companies that facilitated the growth of their retail brand footprints or expansion into foodservice. Smaller multiples were acquired by or aligned with wholesalers to benefit from their brand building and buying strengths. Musgrave and BWG innovated with entry level retail brands for non-aligned retailers and acquired wholesale businesses outside of the state to increase overall buying power.

The number of wholesale outlets declined (Table 4-17). Figures on wholesale turnover and share are elusive as they were rarely reported. But in 2006 the Competition Authority demanded that wholesalers supply data and described a concentrated industry in which over 95% of the €4.7bn turnover attributable to six wholesalers with Musgrave and BWG accounting for almost 80% of turnover[297]. The Report observed that relative market positions were essentially unchanged since 2001 and whilst these are not reported in 2001 BWG estimated that it had a 23% share, Musgraves 52%, Mangans 8%, ADM Londis 8% and others 9%[298]. The retail sector changed dramatically. Despite the Grocery Order and Planning Directives[299] grocery outlets declined (see Table 4-17).

	1991	1998	2005
Total Wholesale Outlets	192	120	106*
Cash and Carry Outlets	117	109	94
Independents (including TSN and forecourts)	8984	7699	4979
Symbols (including Supervalu and forecourts with symbol)	999	1152	1603
Multiples	154	157	207
Discounters	0	0	94
Total Retail Outlets	10137	9008	6883

Table 4-17 Changes in the Number of Wholesale and Retail Outlets 1991-2005[300]

L&N was acquired by Musgrave in 1995 who saw it as a vehicle to *"step change"* the development of SuperValu[301]. More independents adopted symbol brands including some new symbols (Table

4-18). However, the re-entry of Tesco through their acquisition of Powers Supermarkets and its Quinnsworth and Crazy Prices supermarket brands in 1997 and the entry of German discount multiples Aldi (1999) and Lidl (2000) most profoundly affected the retail market.

Symbol	Symbol Operator	Operated
Centra	Musgrave	1980 -
Centra Quickstop	Musgrave	1999 -
Daybreak	Musgrave	2005 -
Daytoday	Musgrave	1997 -
Eurospar	BWG	1997 -
Mace	BWG / Mangans / Punch	1962 -
Nearbuy	BWG	1997 - 2004
SPAR	BWG	1963 -
SPAR Eight til Late	BWG	1987 - 1992
SPAR Express	BWG	1997 -
Wisebuy	BWG	1982 - 1992*
XL	BWG	2006 -
XL Stop & Shop	BWG	1997 -
Londis	ADM Londis	1970 -
Londis Plus	ADM Londis	2004 -
Londis Topshop	ADM Londis	1998 - 2003
Costcutter	Vantage / Barry Group	1998 -
Costcutter Express	Barry Group	1998 -
Quik Pick	Barry Group	1996 -
Checkout Stores	Gala Retail Services	1998 -
Gala	Gala Retail Services	1998 -
Gala Express	Gala Retail Services	1998 -
Gala Superstores	Gala Retail Services	1998 -
Xpress Stop	Mangans	1997 -
Vivo	Mangans	2002 -
Fine Fair	Ban Ard	1997 - 2004*
Swift	Vantage	1997 - 2000

Table 4-18 Symbol Group Brands 1990-2011[302]

Customer wealth during the Celtic Tiger period, an increasing focus on convenience, and constraints on price competition created a benign environment for the symbol groups. Yet convenience and independent retailers lost share to the multiples (see Table 4-19).

Retail Format	1990	1996	2006
Multiples (Excluding SuperValu)	49%	54%	46%
Symbol Groups	26%	27%	40%
Independents	25%	19%	14%

Table 4-19 Changes in Grocery Market Share 1990 - 2010[303]

Wholesalers increasingly accepted the need to understand consumers resulting in consumer relationships becoming a shared responsibility with retailers and requiring investment consumer insight management. Simultaneously proliferation of retail brands required B2B branding to attract retailers. The launch of TV3 in 1998 saw the end of RTE's TV monopoly, part of a rapidly evolving mediascape. With the advent of the Internet the channels through which brands communicated became more complex, interactive and less controllable and triggering online retailing by multiples. Multiples' media expenditure remained high and wholesalers' brands struggled to achieve effective SOV in national media forcing them to look for alternative ways to build brands such as sponsorships, CSR initiatives and central support for retailers' local initiatives. This created increased requirement for marketers skilled in market research, needs based segmentation and marcoms.

Foodservice was a growing element of wholesalers' business. Appreciating the different dynamics of this market the leading wholesalers established foodservice operations within wholesaling divisions. This market, which is notoriously hard to define and measure[304], exposed them to a different type of competitor, specialist foodservice companies. Companies such as Pallas Foods and Kerryfresh understood the market and had specialist resources including chefs and development kitchens and the wholesalers fell behind[305]. Wholesalers invested in evolving their cash and carry formats to serve foodservice customers and enhanced own brand ranges[306].

Consolidation in the brand supply chain accelerated. For decades manufacturers had distributed non-competing brands but this new consolidation saw the formation of large marketing and logistics organizations squeezing out smaller agents and distributors. Demand for heritage brands remained strong but less robust brands lost to own brand and new brands struggled to achieve distribution. The 5% purchasing flexibility allowed by the symbol group agreements[307] facilitated local product purchasing helping some of these brands survive.

In 1997 Seamus Scally was appointed CEO of Musgraves, the first non-family leader of the business. Although this represented a break from tradition his roots were in Irish retailing and he had a long tenure in Musgraves. From that time new leaders were recruited into the industry drawn from a cohort of professional managers bringing insights from FMCG and service industries that challenged the existing paradigms of the business including the approach to brand. This influenced brands' status within firms elevating strategic brand decisions to senior management.

The perception of wholesalers as key players in grocery distribution and the influence industry representatives exerted on government consultations was limited[308]. The IADT ceased to function as a representative body and the large wholesalers were described as anti-competitive by the media. This came to a head for Musgraves in 2005 when Eddie Hobbs associated them with *"Rip Off*

Ireland"[309]. Despite questions about the balance in the show[310] its critical presentation of the impact of the Groceries Order was influential in Minister Michael Martins's decision to repeal the Order ignoring threats by the retailer lobby[311].

4.8.1.1 Key Industry Competitors 1987-2006

Musgrave Group

Musgraves turnover quadrupled from €482.6 million in 1990 to €2.01bn in 2000[312] accomplished through expansion in the ROI and entry into NI, Britain and Spain. Musgraves grew into Ireland's largest private company[313]. SuperValu and Centra formed the loci around which Musgraves developed its affiliated retail business attracting retailers with single or multiple outlets. The H. Williams purchase was the template for Musgrave's strategy when acquiring a portfolio of stores: operating them as SuperValu or Centra before selling them to entrepreneurs, either existing franchisees or multiple managers[314]. It also demonstrated a solution to independent groups who wanted a supported retail brand even if this meant ceding buying control. The purchase of L&N in 1995 gave Musgraves the national presence associated with a multiple brand. In 1997 SuperValu launched in NI through rebranding their Wellworths acquisition and five Hasletts outlets[315]. In 1998 Roches Stores aligned their food stores with SuperValu taking Musgraves market share to 25%[316]. Des Pettit invited Scally to meet him in 2005 resulting in Pettits joining SuperValu in 2006[317]. Whereas the L&N and Roches brands disappeared Pettits remained part of their SuperValu fascia a model common across regional retailers.

Centra took longer to create a clear positioning. In the late 1990s Musgraves attempted to segment Centra into sub-brands[318] and although discontinued Centra retained two formats, convenience and neighbourhood supermarkets[319]. Centra imposed trading disciplines on retailers and required a minimum store size. To support retailers who would or could not meet these criteria Musgrave launched DayToday in 1997[320] managed through the wholesale division. The brand was successful but it was licenced from Nisa so Musgraves introduced Daybreak in 2005[321]. Musgrave's foodservice business grew through cash and carry and Musgrave Foodservices established in 2000 to deliver food to caterers[322]. During 2004 and 2005 C&R Foods and Variety Foods were acquired to expand this foodservice business[323]. Musgrave's first acquisition outside of Ireland was Spanish distribution company Dialsur in 1993[324] and they entered Britain in 2000 with the acquisition of Budgen. The British business expanded in 2004 with the acquisition of Londis[325].

In 1996 Hugh MacKeown cognisant he was the last family member to lead Musgraves[326] developed a strategy document to provide a framework for the company's strategic direction and capture its mission, vision, values and capabilities. Subtitled *'Serving the Progressive Retailer and Caterer'* it states that Musgraves will develop branded relationship-based systems for retailers operating community based stores and that *"a clear component of the offer will be Musgrave*

owned and managed brands"[327]. This strategy had not anticipated the governance of an expanded group, stating divisions were autonomous and undermining the ability of future group management to enforce common ways of working. In 2005 Musgraves launched a brand development initiative which sought to put brand at the centre of the business. It aimed to find an explicit direction for each brand and bring partner retailers together around a common point of principle[328].

BWG

Pernod Ricard acquired Irish Distillers in 1988 facilitating growth by BWG Foods[329] which was achieved through acquisition and the expansion of its retail and cash and carry businesses. In 1994 they acquired J.J. Haslett including the Mace NI franchise and in 1997 bought Appleby Westward a UK SPAR wholesaler. They built alcohol distribution and foodservice businesses on both islands. Driven by a strategy of achieving national brand footprints they invested in SPAR, Mace and Value Centre. In 2000 the business was sold to a private equity company which allowed for a partial MBO by the senior executives[330]. In 2005 BWG sold their UK Bargain Booze business and in 2006 BWG was sold to Triode Newhill a consortium of BWG's managers.

Although BWG was the sole operator of SPAR the Mace brand had three owners. BWG purchased the Munster franchise from Punch & Co in 2000 but Mangans retained their franchise. BWG had a dual brand retail strategy with SPAR the *"jewel in the crown"*[331]. SPAR was a formidable convenience retailer and more flexible with retailers than Musgraves. The relationship between SPAR International and BWG remained strong which restricted format innovation. SPAR Express was launched but supermarket branding proved difficult. Eurospar was their only supermarket brand and from its launch in 1997 it faced credibility issues with retailers and positioning problems with consumers. The Mace brand was managed by Mace Marketing Services (MMS), had a committed retail base and was particularly strong on forecourts. Wisebuy was phased out and Nearbuy was launched in 1998 to *"provide a low cost entry option"* to retailers[332]. This ceased to be supported after 2004. In 2005 consumer research identified that people were buying into brands particularly for foodservice. This formed the basis for a strategy predicated on in-store concept brands. In Value Centre BWG had a *"recognised brand with national presence"*[333] which was used for expansion[334] and to rebrand acquisitions. The wholesale division introduced an entry level symbol brand XL Stop & Shop as a *"delivered wholesale retail fascia"*[335] and investment in this concept grew. BWG Caterserve was launched in 2001 and Greenhills Wines and Spirits became BWG's alcoholic drinks trading brand.

Stonehouse / Gala

The focus of AND was Keencost cash and carry and Homestead. NWGA formed Gala Retail Services in 1998 to create a national symbol for independent wholesalers[336]. They launched the Checkout, Gala and Gala Superstores brands targeting different types of outlet. As competition

intensified AND merged with NWGA in 2000 to form Stonehouse Marketing with 39 members and 66 distribution depots. Homestead offered a supported own brand option but the Keencost brand disappeared as Stonehouse members reverted to trading under individual identities. Gala differed from other symbols as the role of the wholesaler remained central, predicated on tailoring offerings to local markets[337]. The Stonehouse brand endorsed buying power and underpinned members' marketing to retailers. Stonehouse members Mangans and Barry Group did not align with Gala.

Mangans

Mangans built a strong cash and carry, retail and foodservice business across the West of Ireland and followed their own branding strategy. They were Mace franchisors and in 2005 united with BWG to launch a three year strategy for the brand[338]. In 1997 they launched Xpress Stop as an entry level symbol and in 2002 they acquired the Vivo franchise[339]. The purchase of bankrupt Ban Ard Wholesale in 2004 included the Fine Fair symbol[340] which Mangans chose not to support. Their brand portfolio included Mangans Cash and Carry and Mangans Foodservices.

Barry Group

Barry's of Mallow were members of NWGA. During the 1990s they started to evolve into a distinctive wholesale/retail entity[341]. The drive for this is attributed to Jim Barry who became MD in 2002. He followed a growth strategy predicated on broadening the scope of the business and acquired Tuffy's and Smithwicks of Kilkenny in 2005[342]. In 2006 the company was renamed Barry Group to reflect their ambition to *"act not only as a wholesaler to retailers, but also as a 'wholesaler to wholesalers'"* and become Ireland's third largest wholesaler[343]. Barry launched the Quik Pick symbol in 1996 and in 2000 purchased Costcutter from Vantage. Unlike Gala these were not restricted to Barry's Stonehouse territory[344]. In 2004 Barry announced plans to build a €10 million central distribution centre for chilled and frozen products[345]. The facility was completed but some leading brand suppliers refused to stock it as its operation would undermine the viability of their overall distribution chain. The warehouse became ambient storage.

ADM Londis

In 2005 Londis changed from a co-op to a Plc to fund strategic growth and enable retailers to realise the value of their share[346]. Londis acquired Londis Topshop from their joint venture company in 2003 and merged the brands. Londis relaunched in 2004[347] and Londis Plus was launched to differentiate larger from convenience stores. Londis has a more flexible approach to purchasing facilitating more interaction with brand representatives and suppliers[348].

4.8.1.2 Changing Face of Multiple Brands

The 1990s saw L&N, Roches and Quinnsworth disappear, the re-entry of Tesco and arrival of discounters. Table 4-20 shows the active multiple brands. Dunnes Stores maintained its value

positioning and Superquinn reinforced its food, quality and service reputation. Tesco adopted a different strategy to their previous entry. *"There was no crisis when Tesco came in in 1997"* observed Willie O'Byrne *"it was a slow evolution, Quinnsworth to Tesco... a very slow build"*[349]. Care was taken not to alienate shoppers, familiar brands remained and stores were rebranded Tesco Ireland when they were upgraded to deliver a Tesco experience. Tesco innovated through own brand ranges that enabled them to leverage their buying power and create differentiation[350].

Symbol	Format	Operated
Aldi	Deep discounter	1999 -
Applegreen	Forecourt retailer	2005 -
Crazy Prices	Discounter	Bought by Tesco 1997
Dunnes Stores	Grocery multiple	Throughout period
L&N	Grocery multiple	Bought by Musgrave 1995
Lidl	Deep discounter	2000 -
Marks & Spencer	Grocery Multiple	Throughout period
Pettits	Grocery multiple	Aligned with SuperValu 2006
Quinnsworth	Grocery Multiple	Bought by Tesco 1997
Roches Stores	Grocery Multiple	Aligned with SuperValu 1998
Superquinn	Grocery Multiple	Throughout period
Superquinn Select	Convenience multiple	2004 -
Tesco	Grocery Multiple	1997 -
Tesco Express	Convenience multiple	2004 -

Table 4-20 Multiple Retailers 1990-2011[351]

Aldi and Lidl became collectively known as 'discounters' and although both focused on selling unfamiliar brands Lidl offered a wider range, more non-food products and was receptive to promotional pricing[352]. Previously brand loyal consumers experimented with the exclusive brands carried by discounters and the sector began to gain traction. Both sourced Irish product and played the 'Irish flag' to change consumer perceptions[353].

4.8.2 Branding Capabilities Develop

Wholesalers continued to invest in brand which increasingly became a senior management concern. As a corollary there was a revitalised marketing focus and investment in branding capabilities. During the 1990s this was the preserve of symbol brands but it expanded to include foodservice and corporate brands. Insight based segmentation strategies evolved to address the complex customer base stimulating brand centric innovation around range, store format, customer experience and distribution. This required input from brand and marcoms agencies and measurement of marcoms effectiveness against brand objectives[354].

The positioning of the symbols around 'community' differentiated them from multiples but not from each other. With the increase in symbol brands wholesalers needed unique differences for

each brand to recruit retailers and attract consumers. Regular brand relaunches occurred supported by consumer and trade communications with the focus moving from image to strategic positioning and values[355]. Due to their ownership structure loyalty schemes introduced by the multiples proved hard to devise for symbols[356].

Symbol brand activity had to engage the independent retailers. Wholesalers needed to consult this community with respect to expenditure, delivering the proposition and brand experience. Retailer Councils and conferences were a means of launching initiatives and receiving feedback but retail support teams were the primary conduit to ensure compliance. The efficiency of marcoms increased as national footprints expanded but *"the reputation of the brand is brought down by the worst retailer"*[357] and inconsistencies in delivery could undermine brand equity. Limited media is available to build B2B brands and trade press was critical in retailer recruitment. In addition to advertising wholesalers supplied material for editorial content and special supplements. Brand building activities continued around the cash and carry and foodservice brands.

Advertising expenditure grew and local retailer sponsorships were integral to community positioning but from 1992, when SuperValu commenced their ongoing support of the National Tidy Towns Competition, national sponsorships became a branding tool[358]. Suitable sponsorships are hard to find but liberalisation of media sponsorships rules provided properties to augment sports, arts, culture and community opportunities. CSR helped build retail and corporate brands encompassing a continuum from cause based marketing to pure CSR and a range of objectives from softening the image of the business to supporting local retailers' initiatives (Appendix J illustrates a selection of these properties). Supplier development programmes such as SuperValu Producer of the Year Award played a role in brand externalisation as did management training schemes, communication of hygiene, safety and quality awards, store of the year communications and recruitment advertising.

4.8.2.1 The Role of the Corporate and Internal Brand

Corporate brands remained undeveloped, the focus being on forward facing trading brands whilst the corporate brand was primarily backward looking engaging with suppliers and reflecting the combined buying power of trading brands[359]. As a private company Musgraves saw little need to invest in corporate branding[360] and the family was reluctant to engage with the media[361]. This approach is reflected in the simplicity of corporate materials such as annual reports. Musgraves located their marketing office in Dublin throughout the 1990s to raise their profile[362] but moved it back to Cork around the turn of the Millennium. In 2005 Chris Martin initiated a corporate brand audit which identified that the brand was perceived as a good employer in Cork but elsewhere was seen as *"old fashioned, low tech and a bit of a dinosaur"*[363]. The corporate image was refreshed and the quality of corporate communications improved. As Musgraves became an international

group the corporate brand became important in reassuring retail customers of their credentials. BWG as a division of a multinational only required a corporate image in the lead up to their sale. After the buy-out the brand architecture was fragmented and the corporate entity had little depth around which to build a brand.

The relationship between culture, values and brand slowly evolved. Employee engagement around values was not explicitly recognised as a dimension of brand until new leaders imported learnings from other industries forming the basis of internal brand engagement from 2004[364]. Musgraves started their move to internal branding with an employee brand engagement project encompassing all its divisions. The Group HR function engaged in a project called 'The People Experience' to explore the interaction between employees, external stakeholders and Musgraves as well as exploring the employer brand. Musgraves established that whilst there was engagement and understanding of the trading brands employees were less able to connect with the Musgrave brand.

4.8.3 The Maturing of Group Retailing.

Changes in the independent retail sector saw wholesalers having to accommodate different types of customer relationship within brand architectures. 'True independents' continued to trade without branded fascia and at the other end of the spectrum were large independent chains such as Pettits, Caulfield and Griffin managing a dual brand strategy and demanding high service levels. In Musgraves and BWG the partnership brands were managed by retail divisions while transactional brands (often described as secondary, wholesale, or third tier brands) were managed through the wholesale divisions, similar to relationships between Stonehouse and their retailers[365].

With increasing choice of symbols tangible and intangible attributes of the brand influenced entrepreneur's choice of partner. Tangible attributes included competition, availability of capital, level of support, and loyalty criteria. Intangible attributes included personal relationships, self-image and brand perceptions. Entrepreneurs were attracted by different types of business model represented by symbol brands[366]. The trade magazines illustrate the range of reasons retailers give for choosing symbols[367] but overall *"people work with people"*[368] and retailers trust people to deliver the promised support[369]. Service levels and margins were critical in churn between symbols which remained low due in part to retailers' investment in and loyalty to 'their brand'[370]. Retailers objected to being 'bought' as part of an acquisition giving competitors an opportunity to recruit while purchasers tried to form relationships and migrate customers to brands within their architecture[371]. Musgraves was recognised as the 'best' partner but their tight level of control made them too dictatorial for some. Some more entrepreneurial retailers preferred BWG or smaller organizations[372]. Brand was becoming how retailers defined their relationship with symbol owners seeing themselves as buying into a brand not a supplier.

As the partnership model matured tensions grew between wholesalers and retailers in terms of compliance. Wholesalers saw themselves as the locus of innovation but had to sell rather than demand that they be adopted[373]. Musgraves realised that refocusing around retail brands could act as a driver of harder relationships and that engaging retailers in the branding process could reduce tensions and form a basis for change[374]. This process was started in 2004 with SuperValu and Centra and *"turned the relationship from verging on the adversarial at times to being one of joint problems, joint solution, pro-creation"*[375]. Defining the brand essence clarified what activities emphasized the brand positioning directing innovation, marcoms and behaviours[376].

From the earliest symbols retailing awards such as Store of the Year were important in raising standards and ensuring shared ownership of the brand[377]. These awards continued and as new groups formed were universally adopted. Independently audited[378], competition amongst retailers for the awards was fierce and success generated respect amongst their peers forming an advocacy and experience mechanism for brand building[379]. The brand consistency achieved across the symbols was such that despite community positionings, the presence of locally sourced goods and engagement in local activities customers were often unaware they were independently owned[380].

Symbols developed distinctive convenience formats for top up shopping, snacks and food to go. The QSR market was undeveloped and convenience brands became associated with food to go[381]. For example SPAR incorporated foodservice into all convenience stores and Eurospar innovated with targeted sub-brands[382]. This meant that head offices had to employ foodservice specialists and retailers had to be trained in handling take-away foods. With these changes SPAR's business model started to improve and gross margins increased[383]. By 2004 over 80% of consumers used convenience stores[384]. Multiples' entry into convenience retailing[385] blurred distinctions between formats so brand image and innovation became key tools for symbol differentiation[386].

Oil companies and forecourt operators saw convenience retailing and QSR as a way of offsetting eroding fuel margins. From the mid-1990s the symbol brands partnered oil companies to develop bespoke retail formats[387]. BWG developed SPAR Express opening their first outlet in a Petrogas garage in 1998[388]. Mace developed a partnership with Maxol and Maxol/Mace became an enduring brand alliance[389]. ADM Londis formed a joint venture with Tedcastle Oil and launched Londis Topshop in 1998. This was re-absorbed into the Londis brand after a brand architecture review in 2003[390]. A joint venture between Texaco and a Superquinn convenience brand failed. Applegreen, developed by Petrogas after their relationship with BWG ended, modelled itself on vertically integrated multiples with central distribution supported by a buying relationship with the Barry Group[391]. Other oil companies developed forecourt brands which were supplied by wholesalers. By 2000 over 95% of forecourts had a store and average store sizes had doubled to 1200 sq. ft.[392] making them suitable for many symbol brands. As a Gala retailer reported *"a well-known and*

respected brand name is important as motorists can make a snap decision on whether to stop at any given forecourt"[393].

4.8.4 Reframing the Role of the Wholesale division

As the retail market consolidated and foodservice grew the role of wholesale divisions changed. This engendered investment in infrastructure creating distinctive positionings for trading brands. Throughout the 1990s cash and carry was seen as important for cash flow but without a long term future which was expected to be in delivered distribution[394]. However, by refocusing their range around food and adapting to new eating trends a new type of cash and carry emerged which was a mix of walk-in and delivered[395]. The trading environment started to transform through opening new or upgrading old premises with expanded ranges. Branding techniques developed in retail were leveraged to build customer relationships.

Foodservice is a fragmented market and chefs are promiscuous in their buying patterns demanding quality, value and 100% service levels[396]. The wholesalers faced a different type of competitor in foodservice: specialists with a deep understanding of customers and bespoke sales and distribution operations. Acknowledging they were late in exploiting the potential of this market wholesalers launched delivered foodservice brands in the mid noughties. These were separate from the cash and carry, spanning the spectrum of foodservice operations from QSR to institutional catering. Unlike most foodservice brands which are restricted to ambient, fresh or frozen, Musgraves and BWG operated across all. In 2005 Musgraves estimated their share of the foodservice market was 4% with an estimated turnover of €178 million making them market leader with their nearest competitors BWG at €70 million and Stonehouse at €60 million[397].

4.8.5 Own Brand Sophistication

Own brand was an integral part of wholesalers' retail brand strategy driven by the sophistication of the multiples' approach and by wholesalers increased focus on fresh food and brand differentiation. Dunnes and Quinnsworth launched premium ranges in the mid-1990s and from 1998 Tesco introduced segmented own brand ranges—Tesco Value, Tesco and Tesco Finest[398]. Fresh food and ready meals were loci for own brand innovation, both categories where traditional brands were weak and where control of supply chain and quality was paramount in controlling risk. This influenced Musgrave's approach to own brand when they started fresh foods central distribution in 1997 forcing them to review supplier interfaces and quality control systems[399]. Lidl and Aldi's tertiary brands designed to communicate value were sourced in Germany or from Irish food processors willing to provide exclusive labels at competitive prices[400] , a strategy that was successful in showcasing Irish produce and avoiding negative brand perceptions[401]. Each trading brand included one or more own brand ranges, and exclusive brands were sourced as price fighters

in categories where there was inadequate buying power to command quality own brand[402]. By 2006 own brand share was still low with penetration mainly in low risk categories.

4.8.6 Changes in the Supply Chain and Brands

Consolidation in the wholesaler base, the decline in independent grocery outlets and the growth of multiples and discounters resulted in fewer buying points for manufacturers' brands while central billing and central distribution distanced suppliers from symbol customers. Multinationals remained committed to marketing operations in Ireland and consumers remained loyal to brands. The discounters carried a limited range of recognised brands and consumers augmented discount shopping with bespoke purchases in adjacent symbol outlets[403]. However, the relative power of branded suppliers was decreasing and for reasons of efficiency and scale consolidation of brand ownership occurred through mergers and acquisition, many of the firms involved having extensive brand portfolios of Irish and international brands. Table 4-21 illustrates a selection of the activities.

Year	Companies Merging	Merged Entity
1990	Ballyclough Co-op & Mitchelstown Co-op	Dairygold*
1991	Roma Foods and Allegro	Allegro
1991	NFIL (Batchelors) & Beck Smith	Batchelors
1992	Premier Dairies & Express Foods Irl & Waterford Foods	Waterford Foods
1997	Avonmore & Waterford Foods	Glanbia**
1999	Allegro & Gillespies	Allegro Ltd
2001	Golden Vale & Kerry	Kerry
2002	Freshways & Kerry	Kerry
2003	Barry's Tea & NFIL	Maiden
2004	Fruitfield & Irish Biscuits	Jacobs-Fruitfield
2006	Roma, Shamrock & Odlums	Origin Foods

Table 4-21 Selection of Consolidations of branded food suppliers[404]

*Dairygold renamed consumer foods division Breeo in 2005. ** Renamed Glanbia in 1999

4.9 DEREGULATION AND RECESSION (2006-2011)

Many of the trends outlined in the previous section are pertinent to this era. However, some factors make it fundamentally different and worthy of separate discussion. Firstly, the repeal of the Groceries order removed the prohibition on below cost selling. Secondly, the banking crisis triggered recession and a change in consumer behaviour and attitudes towards grocery products. Thirdly, approaches to brand shifted with it becoming an organizing principle in the industry leader

The wholesale industry saw further consolidation, diminution in retailer customer base and increased importance of foodservice.

In 2006 the Groceries Order was replaced by the Competition (Amendment) Act 2006[405] removing the prohibition on below cost selling. The consultation process that preceded repeal of the Order, and the subsequent review of competition in grocery distribution[406] highlighted diminished perceptions of the independence of group retail customers and the role of wholesalers. By 2009 48% of shoppers thought symbols were part of centrally owned chains, a common fascia signalling common ownership[407] reinforcing perceptions of lack of competition in retail. For wholesalers the repeal of the Order represented a watershed in their approach to lobbying and their relationship with the media and heralded a more proactive approach to building corporate brands.

With the onset of recession in 2007 consumers cut spending and sought value. The foreign multiples by-passed traditional distribution channels, imported brands directly, and engaged in price wars. Own brands' share of market rose from 16% in 2001 to over 33% in 2010[408] and 35% in 2011[409]. Wholesalers bought on the grey market, leveraged international alignments and forged new alignments[410] to source brands and own brand at competitive prices. Despite these moves symbol and independent retailers lost share to multiples[411]. The multiples aggressively promoted their value proposition to consumers. Lidl and Aldi offered lower prices than other retailers[412] and grew share. In 2009, ostensibly to address cross border price differentials, Tesco launched a 'Change for Good' campaign reducing prices and replacing many Irish brands with unfamiliar UK brands and own brand. This initiative was a *"Trojan Horse of change"*[413] to long line distribution from the UK and disintermediate Irish suppliers and distributors[414].

4.9.1 Industry Recipe

The industry recipe is hard to define as no single set of decision rules appeared to govern the industry. Table 4-22 shows the decline in wholesale outlets and independent retailers. In 2006 the Competition Authority recorded six significant wholesaler-franchisors. The consolidation of the supplier base accelerated further diminishing Irish suppliers. Demand for heritage brands remained strong but less robust brands lost to own brand particularly in generic categories. Despite loyalty to brands by 2011 the balance of power had tipped from proprietary brands to retail brands as guarantor of quality.

	2005	2010
Total Wholesale Outlets	106	93
Cash and Carry Outlets	94	81
Independents (including TSN and forecourts)	4979	4381
Symbols (including forecourts with symbol)	1603	1771
Multiples	207	259
Discounters	94	197
Total Retail Outlets	6883	6608

Table 4-22 Changes in the Number of Wholesale and Retail Outlets 2005-2010[415]

New industry leaders imported a new definition of brand, that of an organizing principle, with an enhanced role in driving consistency and innovation throughout the organization and building customer engagement and loyalty. As Hugh MacKeown observed, what had been implicit became increasingly codified and explicit:

> *"I think our thrust into brand was definitely always there but I think it acquired a much higher level of focus and importance with Chris Martin ... an awful lot of it was always done but it became explicit, it was absolutely focused on as being one of the pillars that would drive the business"*[416].

Brand was seen as the responsibility of the CEO and the Managing Director[417] and structures were put in place to support a more brand orientated approach. Martin had initiated this new approach to brand before he replaced Scally as CEO. He contracted Rita Clifton of Interbrand to begin a journey of evolving the level of brand understanding throughout the organization based on his belief that *"a brand is something you organise yourself around"*[418] and utilising Interbrand's 'Four Quadrants' model [419] to operationalize this through each trading brand to find a point of sustainable competitive advantage and to help modernize the business[420]. BWG refreshed their approach to branding when Leo Crawford appointed Willie O'Byrne as CEO. He married his prior wholesaler experience with the more brand centred approach of O_2. Jim Barry re-energised Barry's approach to brand. These leaders led the transition to a systematic approach to consumer insight, strategic brand management and brand analysis. Willie O'Byrne noted:

> *"We have probably moved our thinking from thinking like a wholesaler to thinking like a retailer to actually thinking like a consumer even in the way we design our business and our strategy. We found that in thinking like a wholesaler the sale ended when you pushed the stock into the retailer. You needed to move one step further and think like the retailer to make sure that the stock is sold through*[421]*"*

4.9.1.1 Industry Competitors (2006-2011)

Musgraves

Despite tough trading conditions Musgraves continued to grow, their turnover reaching €4.38bn in 2010[422]. Aware of the challenges facing family businesses a Musgrave Family Constitution was introduced. Its aim was to ensure they remained connected to the business whilst *"delegating appropriate authority to a professional board of directors to run the business"*[423]. Martin updated Hugh MacKeown's business strategy with respect to brand. Divisional leaders would be *"management teams who work with the Musgrave brand"* across all business units[424]. With the acquisition of Haslett in 2007 the Mace and XL Stop & Shop brands in NI became part of Musgrave's brand portfolio. Mace retailers remained resolutely loyal to their brand so it was retained. Similarly in Britain Londis retailers' loyalty forced retention of the brand. By 2010 Musgraves were managing nine retail brands across 3,347 stores[425] with little synergy between them in terms of own brand or marketing expenditure.

Increased appreciation of the role of each brand in the architecture motivated rebranding across the business. Musgrave was to serve as corporate and employer brand and the trading brands were to be customer facing. The process of refining the corporate brand was instigated to create a sense of 'One Musgraves' predicated on common behaviours and ways of working. It was built through building design, communications, CSR and the approach to performance reviews[426]. At a divisional level brand engagement was conducted in concert with a renewed focus on engaging customers. Donal Horgan chose the HR director to lead this process rather than marketing because:

> *"...it was new to us and sometimes in the organization, marketers can be seen to be at the fluffier rather than at the commercial edge...It helped signal that the brand was everybody's business, not just marketers...deeply rooted in every part of the business"*[427]

A brand essence gave clarity to activities emphasizing the brand positioning, directing innovation, communications and behaviours. A programme called Retail Excellence was introduced as a method for working with retailers, brand metrics being integral to this process. The name Musgrave Supervalu Centra was replaced with Musgrave Retail Partners Ireland (MRPI) in 2007.

Musgraves realised the need to create a distinctive cash and carry brand around which to organise change. The concept behind the brand was a 'food market' environment hence the name Musgrave MarketPlace[428]. This brand helped facilitate positioning Musgrave as a distinctive corporate brand[429]. There was substantial investment in developing MarketPlace, transforming environments to connect with foodservice operators and retailers, communicating this change and training employees to deliver the brand. Research to understand the needs of new types of customers was undertaken[430] helping offset the decline in the retail business. In 2011 it was one of the few brands in the portfolio in growth. A review of the Musgrave Foodservices brand resulted in the business structuring itself around foodservice expertise and refocusing on commercial rather than price-led industrial catering[431]. By 2009 foodservice accounted for 50% of Musgraves wholesale division sales. The same year Centra was identified as Ireland's leading QSR brand with 10.2% market share[432]

In July 2011 the day after Superquinn went into receivership Musgraves announced that it had purchased it subject to Competition Authority approval. When the acquisition was announced Musgraves were portrayed as saving jobs but journalists reframed this to Musgraves being responsible for supplier job losses. Musgraves established Musgrave Operating Partners to manage it as a multiple under the Superquinn brand[433]. The Superquinn takeover illustrated Musgrave's corporate brand's role in protecting trading brands from negative PR.

> *"Nobody associated Supervalu, Centra, Daybreak, Marketplace with what Musgrave were doing to buy Superquinn. If there had been Supervalu buying Superquinn, the perception... was that suppliers were being shafted by Supervalu, then that retail brand would have suffered but it didn't and the association wasn't made"*[434].

BWG

SPAR and its sub-brands remained the primary partnership brand in BWG. In 2007 Mangans celebrated their 75th Anniversary with an event for retailers where they stressed that the business was not for sale[435]. Mangans was one of BWG's prime acquisition targets[436] and in 2008 they acquired it for €45 million excluding the property portfolio[437] consolidating ownership of the Mace brand in the ROI. Over the ensuing three years BWG rationalised the two operations closing a mixture of Value Centre and Mangans outlets and phasing out the Mangans brand[438]. Integrating Mace was the role that brought Willie O'Byrne back to BWG and his strategy was to restructure the BWG and Mangans support teams to make Mace the hero and dilute retailer resistance to the change. The management of MMS was absorbed into the BWG retail division.

O'Byrne left BWG in 1997 and returned in 2008 finding it largely unchanged. In 2009 he became MD of BWG Foods and subsequent to his promotion change was accelerated requiring tough commercial decisions and capital investment. The traditional wholesaling model was predicated on divisions with separate bottom lines and this was reframed to one bottom line servicing retailer and caterer needs irrespective of how customers organised their buying patterns. Brand architecture was a Board level issue and clear governance was introduced to control the introduction, positioning and role of each brand. Little attempt had been made to crystallize the essence of the BWG corporate brand and a process was initiated to identify company values and formalizing its vision and mission. While undefined its essence was seen to be around partnership with entrepreneurs and enterprises. In 2011 for the first time a conference branded BWG was held for customers whatever brand they operated under[439].

O'Byrne rebranded the foodservice brands to BWG Foodservices and BWG Wines and Spirits in an attempt to clean up the brand architecture but not as part of a concerted attempt to create distinctive B2B brands. BWG have used exclusive brands throughout their wholesale and retail businesses as a means of differentiation with brands such as Tim Hortons and bespoke coffee brands in each of the retail brands. John Clohisey[440] took a share in Insomnia coffee and this brand was introduced into SPAR whilst Bewleys Fair Trade was introduced into Mace[441]. An Irish sourced meat brand Glenmór was created for all BWG customers and distributed through wholesale and retail channels.

Barry Group, Stonehouse and Londis

Jim Barry saw an opportunity to offer a differentiated discount brand[442]. Buy Lo was launched in 2009 selling discounted well-known brands to consumers and small foodservice businesses[443]. However, the roll out was constrained by lack of suitable locations[444], concerns by Costcutter retailers[445] and objections to planning permission supported by RGDATA[446]. In 2009 Barry acquired the Carry Out off-licence chain[447] and invested in brand building. By 2011 Barry Group

had 235 affiliated retailers, a significant alcohol business, a growing non-food import business supplying Barry retail outlets and other wholesalers plus an active export business. Barry's perceive customers and employees as central to what they do. This assertion is supported by their being one of Deloitte's Best Managed Companies in 2009[448], winning a Great Place to Work Award and gold in the Excellence Through People accreditation[449]. Since Barry became CEO they have engaged in building the internal brand as part of their business strategy. A brand values process was championed by Barry who believes values must be lived from the top down. Brand engagement has been led by the HR and marketing teams[450].

Within Stonehouse there was consolidation and by 2011 it had shrunk to 27 members with 36 depots[451] and in 2010 Gala moved out of Stonehouse's premises[452]. Gala Express was launched to attract younger urban consumers and Gala developed an own brand range and an image built around local and community values[453]. Nisa-Today formalized an exclusive deal with Londis in 2009 giving them access to a pre-existing Irish distribution network[454] and Londis access their €6bn buying power, leverage with brand suppliers and the Heritage own brand range[455]. Londis entered a strategic partnership with Kerryfresh to develop the Londis Fresh Food to Go range[456].

4.9.2 Branding capabilities

The appreciation of the multi-faceted nature of brand engendered cross-functional approaches. Brand was a strategic imperative directed by senior managers. Marketing's role in branding had two dimensions, strategic marketing to drive the long-term direction of trading brands and tactical to enact shorter term brand centric activities. Sales and retail support teams were directed to recruit and develop retailers who would deliver a consistent brand experience. Buying policy focussed on sourcing products that delivered consumers value and contributed to differentiating the retail brand around its essence. Brand orientation, particularly in Musgraves, encompassed functions not previously considered relevant in brand building such as finance and logistics.

The requirement for branding capability drove the use of external specialists including brand consultants and communications agencies[457]. However, the importance of bringing this expertise in house and using brand to modernize traditional businesses was critical and brand became a means of working with colleagues and customers. The opportunity to build distinctive B2B brands for foodservice and augment wholesaling skills through customer experience took brand orientation into wholesale divisions[458]. Musgraves exported branding capability to affiliates in the form of senior managers to help build those businesses. The move towards brand capability was evident across the industry but most extensively in Musgraves. Each divisional manager was charged with brand leadership and building profitable brands. A Brand Council co-ordinated brand management across the Group with common approaches to brand creation and measurement being imposed by the Board[459]. Despite this branding was still not perceived as a core competency of the business[460].

The manner in which the industry evolved resulted in complex brand architectures and a multitude of legacy brands. The role of each masterbrand, sub-brand and own brand needed to be explored to maximise clarity and efficiency. Wholesalers realised that controlling brand architecture was imperative and that the business model must match the architecture[461]. Retailers aligned with acquired symbols wholesalers wanted to cease supporting could not be forced to switch to more strategically important brands. The strategy employed was to educate these retailers in the benefit of aligning with supported brands.

The Internet became important for brand building and by the close of the noughties all wholesalers and symbols had websites. Content on the website became increasingly brand centric as the medium was better understood. Social media emerged as a brand building device requiring constant real-time monitoring and management. The brands used social media especially Facebook to create dialogue with their customers. Brand marketers described social media as analogous to a *"mystery shopper"* delivering feedback and forming part of the communications strategy[462].

The changed commercial situation challenged wholesalers to review their internal processes but effecting change in deep rooted cultures is difficult so internal brand initiatives became a tool in overcoming resistance, signalling and acting as an agent of change[463]. Brands enabled new ways of working across divisions, aligning acquired businesses, and ways of working with suppliers. Increasingly it guides employee development and performance[464]. Whilst Musgraves were first to take a systematic approach to internal branding it is also evident in Barry Group.

4.9.3 Own Brand and Branded Suppliers

Approaches to own brand changed in response to recession and also due to better appreciation of retail branding and focus on supply chain management. Wholesalers' strategies included reviews of own brand architecture and clarity around the role of each own brand, generic or exclusive brand in addressing customer segments and creating differentiation[465]. Own brand was accepted as a part of the brand experience, integral to building brand equity. One critical role was consolidation of buying power which was undermined by fragmented own brand architectures[466]. Whilst remaining committed to supporting Irish producers the approach to sourcing hardened and transnational relationships were leveraged to increase scale. For example, Musgraves centralised Group own brand purchasing in Cork, BWG exploited their relationship with SPAR International and SPAR wholesalers and Londis introduced the Heritage range. The risk to brand equity from own brand failure forced investment in quality assurance across retail brands and in foodservice supply where own brand was categorised as medium or high risk by Musgrave[467]. The growth of customers' off licence sales saw exclusive brands emerge as the dominant own brand strategy in the category[468].

In 2006 Nielsen reported that the five leading product brands held an average combined share of 76% but by 2009 this had fallen to 63%[469] due to own brand and fragmentation in branded supply. The removal of the ban on below cost selling precipitated competition that undermined brand equity. Ireland was no longer as profitable for multinational brands and their policy of local divisions became an unacceptable cost causing marketing to be centralised in Britain[470]. Some manufacturers kept a limited front facing presence but pulled back on merchandising and support services[471]. Wholesalers increasingly sourced multinational brands in the UK putting pressure on suppliers of Irish brands to deliver value and stimulate demand. Despite their scale in Ireland even Musgrave Group was a relatively small buyer in the UK context diminishing their buying power with suppliers relative to UK multiples.

Strong, well supported brands continued to exert power on the channel but Irish brands were squeezed between own and multinational brands with their significant resources and branding capability[472]. Irish brand owners' 'house of brands' operations focused on marketing spend and the aggregated brand power being used to exert pressure on buyers and act as a barrier to entry to small novel brands. Irishness of brands was redefined as manufacture of iconic Irish brands moved off-shore relying on heritage and marcoms to maintain loyalty.

In August 2008 the Competition Authority prohibited the merger of Kerry and Breeo two large grocery suppliers[473]. This ruling was overturned by the High Court in 2009 which ruled that the Competition Authority had failed to correctly assess the sufficiency of countervailing power to deter attempted price increases post-merger[474]. As the pace of consolidation increased more mergers were referred to the Competition Authority[475]. A consultation was initiated by the Minister for Enterprise Trade & Employment in August 2009 to address concerns raised about the nature of relationships in the grocery sector with the objective of introducing a Code of Practice. Suppliers who reported practices such as below cost advertising and hello money, which were endemic, feared retribution if they publically criticised buyers. Although suppliers with major brands had leverage with buyers small suppliers had little and own brand suppliers, with no direct relationship with consumers, risked substitution if the retailer chose to end the relationship[476].

4.9.4 Measuring the Value of Brand - Brand Value and Brand Equity

Measurement of the value of brands remained undeveloped until the mid-noughties for two key reasons. Firstly, it was not a priority for boards or senior management. Secondly, the value of retail brands was seen to be built and delivered by a disparate cohort of retailers making identification of the constituents of brand value hard and ownership of the value created hard to attribute. Wholesalers acknowledge that they lacked the desire or sophistication to undertake this process. The value of their brands was in growing the distribution and marketing efficiencies of the business and measures such as sales, market share and footfall were deemed appropriate

measures of brands' effect. When assessing potential acquisitions the target's brand value was not part of due diligence despite some owners and media commentators attributing value to it and purchase decisions were based on earning value not brand value[477].

When new leaders entered the industry a more rigorous approach to measuring brand equity but not brand value emerged. Whilst acknowledging that brands become more valuable over time none attributed a value to brand on the balance sheet seeing significant barriers to attributing a definitive split between the centrally owned and managed brand and the retailer created experience. The ability to optimise brand value was also seen to be inhibited by increasingly complex brand architectures at the product, retail, divisional and group levels.

Although continuous measurement of brand equity is not ubiquitous it became accepted as a core metric and all key firms established processes to understand and enrich it. Sales figures, market research, category management and ad hoc brand temperature checks evolved into brand research, brand performance management and brand audits. Musgraves undoubtedly lead their competitors in developing sophisticated brand score cards and brand profitability models but similar systems are emerging in BWG, Barry Group, Gala and Londis. Attributes of brand equity such as brand awareness, brand affinity and brand advocacy are measured against brand essence, values and positioning objectives and these are built into KPIs and constitute part of the strategic planning process. As online and social media grow in importance tracking of brand equity has extended to measure their impact. The centrally distributed retail brands were the starting point for understanding brand equity and this process is moving into the secondary symbols managed through wholesaling divisions along with B2B trading brands. Despite corporate brands being seen to have value no interviewees reported measuring their equity.

4.10 SUMMARY

Branding emerged in the wholesale grocery sector as an element of strategic responses to changes in the macro-environment and the structural dynamics of the industry. They helped diffuse distribution, service and product innovations across the industry and its value chain facilitating the industry's survival and growth. They made distinctive service propositions salient to a segmented customer base and served as a fulcrum for cooperation, diversification and merger and acquisition activity. This helped create barriers to entry, consolidate the industry and create economies of scale and scope. As the power of the multiples grew brands helped wholesalers avoid disintermediation while simultaneously exerting incremental pressure on product suppliers who have been replaced by retail or foodservice brands as the guarantor of quality. The growing importance of brands within the industry is reflected by their increasing centrality to business strategy and organizational structure and practices.

ENDNOTES CHAPTER 4

[1] Personal interview with Jim Dunne
[2] Personal interview with John Fanning
[3] Personal interview with Ciaran O'Reilly
[4] de Chernatony, L. (2009). Towards the Holy Grail of Defining 'Brand'. Marketing Theory, 9 (1), 101–105. p. 104
[5] Personal interviews with Jim Dunne and Ciaran O'Reilly
[6] Personal interviews with David Erixon and Dara Neary
[7] Personal interviews with Janice Epstein, Alda McDonagh, Andrew Meagher and Ciaran O'Reilly
[8] Personal interview with John Fanning
[9] Personal interviews with Olive Fogarty and Ciaran O'Reilly
[10] Personal interviews with Paul Donovan, Jim Dunne and David Erixon
[11] Personal interviews with John Fanning, Olive Fogarty, Andrew Meagher and Ciaran O'Reilly
[12] Personal interviews with Alan Cox, Janice Epstein, Paul Donovan, John Fanning and Dara Neary
[13] Dara Neary is a Culture and Capabilities expert, with experience of brand internalization and employer branding processes
[14] Personal interview with Paul Donovan
[15] Personal interview with Ciaran O'Reilly
[16] Personal interviews with John Fanning and Ciaran O'Reilly
[17] Personal interviews with Eoghan Crawford, Jim Dunne, David Erixon and Alda McDonagh
[18] Personal interviews with Paul Donovan, John Fanning, Dara Neary and Ciaran O'Reilly
[19] Personal interviews with Eoghan Crawford, Jim Dunne, David Erixon and Nicholas Spring
[20] Some data is unavailable and therefore throughout the case data from adjacent years might be substituted. This will be clearly noted
[21] Competition Authority (2008). A Description of the Structure and Operation of Grocery Retailing and Wholesaling in Ireland : 2001-2006. Dublin, Competition Authority
[22] This is recorded in many personal interviews including Peter Kealy, Pat Fox and Chris Martin
[23] Discounters are either categorised as multiples or separately as discounters in published data
[24] Voluntary Group Retailers are generally referred to as symbols, or symbol groups and this term will be used throughout the case
[25] Some stores are owned by the wholesalers (especially BWG stores) and are managed by franchisees under similar terms to the independent entrepreneurs
[26] The terms own brand, own label and private label have been used in documentary, archival resources and interviews, often interchangeably. The term 'own brand' will be used throughout this chapter
[27] Competition Authority (2008)
[28] Ibid
[29] Competition Authority (2009). Retail-Related Import and Distribution Study. Dublin: Competition Authority
[30] Checkout Ireland Yearbook and Buyer's Guide 2010/2011. (2010). Dublin: Checkout Publications
[31] Worldwide Grocery Wholesales Industry (NAICS 42241). (2010). Worldwide Grocery Wholesales Industry Report, 1-10
[32] There were also 12,000 TSNs and kiosks selling a limited range of grocery products
[33] Bord Bia (2010b). Irish Foodservice Market Directory
[34] Compiled from Bord Bia (2010b) and Hotel & Catering Review Directory and Buyers Guide 2010-2011. (2010). Dublin: Jemma Publications
[35] AC Nielsen (2010)
[36] Compiled from Kantar Worldpanel figures in Checkout July 2010 - November 2011
[37] Bord Bia (2010a), Channel Opportunities in the Irish Foodservice Sector.
[38] Checkout Yearbook & Buyer's Guide 2010/11. (2010). Dun Laoghaire: Vesey Publications.
[39] Bord Bia (2010b)
[40] Leonard, T. (1st September 2011). Smart Consumer: Who's Behind Own-Brand Labels? You May Be Surprised! Irish Independent
[41] Expenditure recorded by Nielsen and run by Carat in May 2011.
[42] Ibid
[43] Collated from A C Nielsen, Competition Authority (2008), Kantar Worldpanel (2010)
[44] This quote is typical of quotes from multiple interviewees and interviews in the trade press and newspapers.
[45] Personal interviews with Michael Campbell and Tim Nolan
[46] Personal interviews with Pat Fox, Michael Campbell and Hugh MacKeown

[47] Tea was the one commodity branded by wholesalers. Musgrave Tea was a well branded product with strong regional distribution through the Munster region
[48] There were no supermarket multiples in 1958. Traditional grocery chains included Findlaters, Liptons, L&N Tea Company, H Williams and DE Williams
[49] Consumer goods were in such short supply during the War that advertising was largely seen as pointless. Oram, H. (1986). The Advertising Book : The History of Advertising in Ireland. Dublin: MO Books. p. 122
[50] A Radio Eireann radio schedule indicates that programmes between 8.15am and 3pm were sponsored. Sponsors included leading brands such as Batchelors, Fruitfield, Colgate Palmolive and Mitchelstown. The only distributor sponsors were the Moore Street Traders. Oram (1986) p.514-519
[51] Most housewives were at home due to the 'marriage bar' and radio listenership was high
[52] In a personal interview Tim Nolan observes that if a retailer had not got the brand that the customer wanted she would go elsewhere as *"there were plenty of other shops"*
[53] Quinn (2002). Industry Evolution: A Comparative Study of Irish Wholesaling. Unpublished Doctoral Dissertation. Dublin City University, Dublin
[54] The Retail Prices (Display) Order 1955 mandated the display of prices for 27 commodities (fresh and processed) at point of sale
[55] Quinn (2002)
[56] Quinn, J., & Sparks, L. (2007). The Evolution of Grocery Wholesaling and Grocery Wholesalers in Ireland and Britain since the 1930s. International Review of Retail, Distribution & Consumer Research, 17(4), 391-411
[57] Wholesaler trade associations emerged in the 1930s and secured better terms from manufacturers and influenced price control within distribution system. Quinn and Sparks (2007b)
[58] Groceries Order 1956 and 1958
[59] The number of cars increased by 118% between 1956 and1966 to almost 300,000. National Industrial Economic Council. (1968). Report on Change in Distribution. Dublin: Stationery Office
[60] O'Rourke, A. D., DeLoach, D. B., & An Foras Talâuntais. (1967). Survival, Group Action in the Wholesale and Retail Grocery Trade. Dublin: An Foras Talâuntais
[61] Personal interview with Hugh Mackeown
[62] Personal interviews with Hugh MacKeown, Aidan Morrison and Seamus Scally
[63] The 1956 Census of Distribution
[64] In 1956 almost 75% of all grocery shops had turnover of less than £100 per week
[65] National Industrial Economic Council. (1968)
[66] O'Rourke et. al., (1967)
[67] In 1956 1.7% of grocery shops belonged to chains with five or more outlets accounting for 13% of retail sales
[68] Personal interview with Hugh MacKeown
[69] Personal interviews with Michael Campbell, Bruce Carswell, Pat Fox, Aidan Morrison and Seamus Scally
[70] Personal interview with Bruce Carswell
[71] Wholesalers used agents to deliver commodities they did not handle such as cigarettes. Confectionary was confined to specialist wholesalers
[72] Irish Wholesale Grocer (1953) notes that although many popular lines restricted to chemists, since Johnson's Baby Powder was made available by Johnson &Johnson (Irl) Ltd quite a number of other manufacturers have followed. Bruce Carswell notes the same trend in his interview
[73] Hugh MacKeown records that five cases was seen as a *'nice order'* and most industry veterans refer to orders being primarily sugar, tea, biscuits, canned fruit and vegetables
[74] Personal interviews with Bruce Carswell and Fergus McKenna
[75] Hugh MacKeown records the importance of the company reputation and the use of corporate advertising to build the corporate brand
[76] Personal interviews with Fergus McKenna and Michael Campbell
[77] National Industrial Economic Council (1968)
[78] Personal interview with Aidan Morrison
[79] RGDATA (1992). Talking Shop : 50 Years of the Irish Grocery Trade, 1942-1992.
[80] RGDATA (1992)
[81] Dunnes Stores advertised the supermarket as *"a personal choice store"*. RGDATA (1992)
[82] Personal interviews with Michael Campbell and Bill Higgins
[83] RGDATA (1992)
[84] Personal interviews with Michael Campbell and Bill Higgins
[85] A review of the Irish Wholesale Grocer from 1952-1953 illustrates the extensive use of advertising by suppliers to wholesalers. Brands advertised include : Batchelors, Lever Brothers (Lifebuoy, Lux, Sunlight Soap, Rinso, Easy Shaving Stick), Jacob's Cream Crackers, Willwood Jams and Marmalades, Golden Vale Processed Cheese, Brillo, Ajax, Country Garden Marrowfat Peas, Brown and Poulson, Stork margarine, Vim,

Bisto, Galtee, Tide, Sunrose, Jeyes, Chivers, Ryvita, Irel. In April 1953 a list of 48 regular advertisers in the Irish Wholesale Grocer was published stating *"These firms realise the value of advertising their goods in the Official organ of the Wholesale Grocers' Association of Ireland whose members have complete coverage of every legitimate retail outlet in the Republic of Ireland".* The Irish Wholesale Grocer. (1953). (Vol 4) Dublin: Parkside Press Ltd

[86] Personal interviews with Michael Campbell, Aidan Morrison, Bruce Carswell and Tim Nolan

[87] Personal interviews with Bill Higgins and Matt Lynch

[88] Recorded in Musgrave Ltd. (1994b). Musgrave Archive. Descriptive List

[89] This included rice, tapioca and semolina

[90] National Industrial Economic Council (1968)

[91] Ibid

[92] Oram (1986). p. 187-189

[93] In 1958 agencies employed 387 and charged out £2.237 million to clients. Oram (1986)

[94] Telefis Eireann launched on December 31st 1961

[95] Quinn (2002) and personal interview with Aidan Morrison

[96] 1960 is a year identified as the start of modern retailing in Ireland by Seamus Scally, Michael Campbell, Aidan Morrison and Fergus McKenna in personal interviews. It is also so identified in Sexton, J. J. (1970). Retail Trade in Ireland :A Study of Its Structure and an Analysis of Trades over the Period 1956/1966. Dublin: Journal of the Statistical and Social Inquiry Society of Ireland, XXII, Part II, 1969/1970, 140-178

[97] O'Rourke et al., (1967)

[98] Ibid

[99] Quinnsworth was later bought by Galen Weston's Powers Supermarkets which was introducing supermarkets during this period

[100] Fair Trade Commission (1966). Report of a Review of the Operation of Orders Relating to the Supply and Distribution of Groceries Undertaken in Accordance with Section 5 of the Restrictive Trade Practices (Amendment) Act, 1959. Dublin: Stationery Office

[101] Personal interview with Mitchel Barry

[102] Personal interview with Aidan Morrison

[103] Ibid

[104] White, D. (2001). A History of Musgrave: The First 125 Years. Cork: Musgrave Group Plc. Personal interviews with Michael Campbell, Hugh MacKeown and Seamus Scally

[105] Retail News. (2004a). History in the Making. Retail News, 7-11

[106] Personal interview with Seamus Scally

[107] Personal interview with Aidan Morrison

[108] Quinn (2002)

[109] Western Wholesale, Sligo joined in1967

[110] Morrison, A. (2003). Forty Years in Ireland: SPAR 1963 to 2003, BWG Food Limited

[111] Ibid

[112] Personal interview with Michael Campbell

[113] O'Rourke et al., (1967)

[114] Aidan Morrison describes how multiple retailers and symbol retailers were described by consumers as *'names'* (the term brand was not used).

[115] Collated from RGDATA (1992), White (2001) and personal interviews with Aidan Morrison, Michael Campbell and Bruce Carswell. *Some dates are not available and estimates have been used

[116] Personal interview with Hugh MacKeown

[117] Personal interview with Tim Nolan

[118] Michael Campbell and Aidan Morrison both worked in leading FMCG organizations as well as in advertising agencies. Personal interviews with Michael Campbell, Aidan Morrison and Peter Kealy

[119] These people became 'accidental retailers' a term was used by Bruce Carswell, but the pattern is described by Aidan Morrison, Peter Kealy and Michael Campbell

[120] Personal interview with Bruce Carswell

[121] Personal interviews with Bruce Carswell, Aidan Morrison and Tim Nolan

[122] Personal interviews with Bill Higgins and Fergus McKenna

[123] Personal interview with Bruce Carswell. White (2001)

[124] Personal interviews with Bill Higgins and Bruce Carswell

[125] Personal interviews with Bill Higgins and Fergus McKenna

[126] Personal interview with Hugh MacKeown

[127] Musgrave Ltd (1994b)

[128] Quinn & Sparks (2007)

[129] Personal interview with Bill Higgins and Fergus McKenna

[130] Confectionary was an important new product category in these early years.

[131] Bruce Carswell notes that he was employed by Nicholas Laboratories in part to get cash and carries to stock their OTC range of pharmaceuticals
[132] The term multiple becomes increasingly used to describe the vertically integrated multiple retailers and will be used from here on in to describe them
[133] Fair Trade Commission (1972)
[134] Musgraves were the first to introduce central billing after Hugh MacKeown saw it in operation in the USA and GB in the early 1970s
[135] Kelly, K. (1978). Editorial in 'Checkout' Yearbook & Buyer's Guide (p. 3-13). Dun Laoghaire: Vesey Publications
[136] Personal interview with Bruce Carswell
[137] The apparent increase in retailers is due to the inclusion of new types of outlets such as TSNs and petrol forecourts in the CSO statistics, outlets that did not carry a significant range of traditional grocery products
[138] Collated from Census of Distribution 1966, 1971, Competition Authority (2008), The Irish Press. (1973, 22nd November). Cash and Carry (Advertisement Feature), Checkout Yearbook and Buyers Guide 1978.
[139] Figures supplied by Aidan Morrison
[140] Personal interviews with Pat Fox, Michael Campbell and Seamus Scally
[141] Hugh MacKeown was Jack Musgrave's nephew. He joined the company in 1966 and became managing director in 1971. He had a profound influence on Musgrave's development
[142] This acquisition has the added benefit of bringing John Smith into the business, a man seen to have had a significant influence on its future development. Personal interviews with Bruce Carswell, Norma O'Sullivan, Mitchel Barry, Hugh MacKeown and Tim Nolan. White (2001). p. 92
[143] Mangans: 75 Years Old and Not for Sale. Checkout (2007b), 33, 10
[144] Murdoch, B. (1971, 1st January). Mace Group to Merge with Golden Goose in Big Grocery Trade Expansion. The Irish Times. p. 14
[145] Fair Trade Commission (1972)
[146] Murdoch (1971)
[147] Personal interview with Peter Kealy
[148] Collated from Checkout Yearbooks (1978, 1983), RGDATA (1992), Irish Press (1973, November), Personal interviews with Bruce Carswell. *Some dates are not available and estimates have been used
[149] Personal interview with Aidan Morrison
[150] Musgrave Brothers changed its name in 1973 to Musgrave Ltd and again in 1994 to Musgrave Group Ltd
[151] This included the Metropole Hotel, their interest in Brooke Bond, their construction operation and Musgrave Sweets. Musgrave Ltd (1994b)
[152] Personal interview with Bruce Carswell
[153] Personal interview with Aidan Morrison
[154] Irish Independent (1978, 26th September). Brooks Buys Carton Outlets
[155] RGDATA (1992) p. 39
[156] Personal interviews with Bill Higgins and Fergus McKenna
[157] Fair Trade Commission (1972)
[158] Department of Enterprise Trade and Employment. (2005). Restrictive Practices (Groceries) Order 1987 - A Review and Report of Public Consultation Process
[159] The term 'housewife' was used to describe the main grocery shopper in most publications until the mid-1970s. The word consumer will be used in the remainder of the chapter to describe these shoppers
[160] Fair Trade Commission (1972)
[161] Ibid
[162] Restrictive Practices Commission. (1981). Report of Enquiry into the Retail Sale of Grocery Goods Below Cost. Dublin: Stationery Office. p. 19
[163] Fresh food manufacturers did not believe wholesalers had the capability to handle these perishable items
[164] Figures compiled from RGDATA (1992), FTC (1972), RPC (1976), Checkout Year Book 1978 and Smythe, L. (1979, 11th May). O'Malley Go-Ahead for Five Star Takeover. The Irish Press.
[165] Fair Trade Commission (1972)
[166] Personal interviews with Bill Higgins and Fergus McKenna
[167] Kelly, D. (1977 ,25th February). Gubay Sets Sights on Provinces. The Irish Times. p. 13
[168] RGDATA (1992). p. 57
[169] The Irish Times (1978). The Big Names and the Big Money, p. 9.
[170] The Irish Times, (1978, 13th December). Gubay Sells Major Share in 3 Guys to Tesco. p. 14
[171] Taylor, S. (23rd March, 1979). Gubay Gets Tesco to Buy Him out of '3 Guys'. The Irish Times p. 14
[172] Smythe (1979)
[173] Fair Trade Commission (1972)
[174] Evidence exists in the minutes of Board meetings in Musgrave's archives and the attitude to trading brands discussed by a number of industry veterans in personal interviews

[175] Fair Trade Commission (1972)
[176] Personal interview with Tim Nolan
[177] Personal interviews with Tim Nolan and Aidan Morrison
[178] Personal interviews with Pat Fox and Aidan Morrison
[179] Musgrave Board minutes mentioned in Musgrave Ltd. (1994b)
[180] Retail News. (2009c, October). Supervalu from the Inside. Retail News, Supplement. pp. 28-29
[181] Quinn (2002)
[182] The Irish Press (1973)
[183] Musgraves, 4; Value Centre, 16; Keencost 24; Superite, 58. Checkout Yearbook & Buyers Guide (1978)
[184] Personal interviews Pat Fox and Aidan Morrison
[185] Research published in the Sunday Independent in 1976 showed that caterers were increasingly using cash and carry for their requirements. Sunday Independent. (1976). Musgrave. A Complete Service for Cash and Carry Wholesale at Three Centres. p. 14
[186] The replacement of Turnover Tax and Wholesale Tax by Value-Added Tax in 1972 also stimulated the attraction of the cash and carry trading and an interviewee reported that retailers would buy white goods and other products for domestic use and write-off the VAT
[187] Personal interview with Fergus McKenna
[188] Personal interviews with Bill Higgins, Matt Lynch, Fergus McKenna
[189] An interviewee recalls that *"I was kicked out of xxx by xxx who had come from a wholesaler group. He said the max discount with the multiples is 7 ½ %, and I know that you are giving 10% to the wholesalers. I want that 10%. I said that I couldn't give it to him – that the wholesalers had added cost. He said that he didn't care, he wanted the 10%. I said no. He said that we could obviously do without his business and he could do without ours, and he closed the account"*
[190] Fergus McKenna of Batchelors noted *"in reality they said that we have to have your peas and beans, but we don't need other things. So if you don't play ball with us, we won't play ball with you"*
[191] Independent research in 1977 found 87% of all adults nationally had seen the symbol and 71% correctly identified it as pertaining to Irish goods. In addition, research undertaken by the EEC in 1981 as a part of a case against the Irish Government in 1981/2 judged that the campaign was so successful that its effect on consumer buying behaviour contravened the Treaty of Rome. The Irish Times (1986). Guaranteed Irish is Alive and Well. p. 14
[192] Quinnsworth was owned by ABF but the RPC (1981) found little evidence of import substitution by them
[193] Michael Campbell described this action as *"so landmark it isn't true"*
[194] The Irish Times (1978). 2½-3% Discount Involved in Food Boycott Deal. p. 12
[195] Lyons Tea, Coca Cola, Gateaux, Allbright and Wilson and Goodalls refused to supply Superquinn with goods following boycotts by small independent grocers. The Irish Times (1978, 31st August). 600 Price Cuts from Superquinn. p. 11
[196] Quinn (2002)
[197] Fair Trade Commission (1972)
[198] Restrictive Practices Commission. (1976). Report of Special Review by Means of Public Enquiry of the Operation of Articles 2 and 3 of the Restrictive Practices (Groceries) Order, 1973, as Amended by the Restrictive Practices (Groceries) (Amendment) Order, 1973. Dublin
[199] Personal interviews Bruce Carswell and Fergus McKenna
[200] Personal interview with Bruce Carswell
[201] The change undermined price awareness and was used by some suppliers and retailers to increase prices
[202] Restrictive Practices Commission. (1981). p. 23
[203] Although Shopping Basket was not the only consumer price feature that impacted on the balance of power in the industry, it was by far the most influential. Another example is The Irish Press feature 'Countercheck' The Irish Press. (1978, 8th February). Countercheck
[204] Personal interview Fergus McKenna
[205] The Irish Times (1978, 17th February). Prices Run-Down Dropped by RTE. p. 1
[206] The Irish Times (1985, 4th April). Shopping Basket 'Unfair'. p. 7
[207] Irish Independent. (1975, 23rd September). Fines...For Selling Vegetables Too Cheaply
[208] The Irish Press. (1976, 11th December). Supermarkets Wage Biscuit Price War
[209] Restrictive Practices Commission. (1981). p. 26
[210] Judgement delivered on 20 December, 1979 by Mr Justice Ronan Keane
[211] The Irish Press. (1979, 31st October). Grocers Get Price Cut Injunction
[212] Seamus Scally observed that *"having come from a retail background myself I could see that store standards we had in VG were so inferior to even Five Star at that time"*
[213] Personal interview with Aidan Morrison
[214] Personal interviews with Aidan Morrison, Seamus Scally and Bruce Carswell

[215] Myles O'Reilly & Associates. (1992). Notification to the Competition Authority by Musgrave Ltd. Of Licensee and Franchisee Agreements. Unpublished manuscript
[216] This can be seen from published literature and was cited in many personal interviews including those with Seamus Scally, Hugh MacKeown, Bruce Carswell, Donal Horgan, Noel Keeley and Philip MacKeown
[217] Reports on who attended the meeting and what was said vary. Bruce Carswell who was there provided this account in a personal interview
[218] Arthur Creighton, who had been instrumental in establishing and building VG had retired in 1977 facilitating this change as he may have resisted the loss of the brand. Personal interview with Hugh MacKeown
[219] Supervalu was bought for $1 from California
[220] Restrictive Practices Commission (1981)
[221] An interviewee observed that *"Musgraves took the right decision, a brave decision but the right decision. If you went into BWG in the morning they would privately recognise it"*
[222] Restrictive Practices Commission (1981)
[223] Elections were held in June 1981, February 1982, November 1982 and February 1987
[224] CSO
[225] After a ruling in 1982 against the government run Guaranteed Irish symbol a CII led initiative resulted in the formation of Guaranteed Irish a company with no share capital funded by member contributions. The campaign resumed and the symbol became a well-known and widely respected brand reassuring on provenance and quality. The Irish Times (1986). p. 14
[226] Personal interview with Hugh MacKeown
[227] Fair Trade Commission. (1991). Report of the Review of the Restrictive Practices (Groceries) Order, 1987. Dublin: Stationery Office
[228] Personal interviews with Hugh MacKeown, Aidan Morrison and Peter Kealy
[229] Fair Trade Commission (1991)
[230] The increasing number of entries and sophistication of the retail directories of the 1980s illustrates this diversification and complexity. Checkout Yearbook & Buyer's Guide. (1983). Dun Laoghaire: Vesey Publications. Retail News Yearbook/Diary. (1985). Dublin: Tara Publishing Group. Retail News Yearbook/Diary. (1989). Dublin: Tara Publishing Group. Today's Grocer : Retail Directory. (1988). Dun Laoghaire (Co. Dublin): F.M. Publications
[231] Retailer figures compiled from Competition Authority (2008). and AC Nielsen Reports. Wholesaler and Cash and Carry figures compiled from Checkout, Retail News and Today's Grocer Yearbooks. *1978
[232] Figures compiled from RGDATA and Nielsen 1998 Report
[233] White (2001)
[234] BWG migrated MNC retailers to other brands but maintained the Mace and Wisebuy brands
[235] Collated from Fair Trade Commission (1991), Checkout Yearbooks (1978, 1983), Retail News Yearbook/Diary (1985, 1989), Today's Grocer: Retail Directory (1985, 1988, 1991), RGDATA (1992), Personal Communication from Aidan Morrison (2011)
[236] Personal interview with contemporary industry senior manager
[237] Myles O'Reilly & Associates (1992)
[238] Ibid
[239] Today's Grocer: Retail Directory. (1991). The Eighties.Decade of Great Change in the Grocery Trade
[240] White (2001)
[241] Myles O'Reilly & Associates (1992)
[242] Personal interview with Hugh MacKeown
[243] Personal interview with Bruce Carswell
[244] Quinn (2002)
[245] Personal interview with Noel Keeley
[246] Personal interview with Hugh MacKeown
[247] Personal Communication from Aidan Morrison
[248] Personal interview with Peter Kealy
[249] Morrison (2003)
[250] Personal interview with Aidan Morrison
[251] Collated from Checkout Yearbook (1983), Retail News Yearbook/Diary (1989), Today's Grocer: Retail Directory (1988, 1991), RGDATA (1992). Personal recollection Helen Marks
[252] IADT News. (1980). Dublin: IADT
[253] Ray Burke moved to BWG in 1983. He became Commercial Director at Musgraves in 1986
[254] Personal interview with Michael Campbell
[255] Ibid
[256] IADT News. (1981). Dublin: IADT
[257] The Irish Times (1984), Today's Grocer (1991). p. 12

[258] IADT News. (1982). Dublin: IADT
[259] The Irish Press. (30th December, 1983). Crunch Talks Soon in Cereal Boycott
[260] Articles 85 of the Treaty of Rome prohibits agreements which prevent, restrict or distort competition and Article 86 prevents abuse of a dominant position
[261] IADT News. (1983). Dublin: IADT
[262] Restrictive Practices Commission. (1987a). Report of Review of Restrictive Practices (Groceries) Order, 1981. Dublin: Stationery Office
[263] Ibid
[264] Fair Trade Commission (1991)
[265] Collated from Fair Trade Commission (1991), Checkout Yearbooks (1978, 1983), Retail News Yearbook/Diary (1985, 1989), Restrictive Practices Commission (1987a), Today's Grocer: Retail Directory (1985, 1988, 1991), RGDATA (1992)
[266] Restrictive Practices Commission. (1987a)
[267] Restrictive Practices Commission. (1987b). Report on Alleged Differences in Retail Grocery Prices between the Republic of Ireland and the United Kingdom (Including Particularly Northern Ireland). Dublin: Stationery Office
[268] Personal interview with Mitchel Barry
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[270] McGrath, B. (1986, 27th March). H. Williams Takes over Tesco Stores. The Irish Times, p. 1
[271] Restrictive Practices Commission (1987a)
[272] Ibid
[273] Hello Money was demanded by multiples to list new brands. This could take various forms including cash, shop fittings (particularly freezers), travel and other incentives for buyers. It constituted a significant barrier to entry for smaller suppliers and stifled innovation from the brand leaders
[274] Fair Trade Commission. (1991) p. 31
[275] Kelly, D. (1987, 16th September). The Price War of the High-Cost Supermarkets. The Irish Times, p. 11
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[277] Fair Trade Commission (1991)
[278] In 1986 the average SuperValu store was 4,000 sq. ft. vs. 1,000 sq.ft. for all independents. Fair Trade Commission (1991)
[279] Personal interview with Hugh MacKeown
[280] Personal interview with Mitchel Barry
[281] Personal interview with Peter Kealy
[282] Ibid
[283] Personal Communication from Aidan Morrison
[284] Personal interviews with Seamus Scally, Bruce Carswell, Sandra Looney and Norma O'Sullivan
[285] Personal interviews with Hugh MacKeown and Sandra Looney
[286] Personal interview with Hugh MacKeown
[287] Personal interview with Seamus Scally
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[289] Mintel (2003). Brand vs Own-Label Consumers. London: Mintel.
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[291] Personal interviews with Willie O'Byrne, Noel Keeley, Donal Horgan and Suzanne Weldon
[292] Personal interviews with Sharon Buckley and Willie O'Byrne
[293] Mintel observed that Ireland has been described as one of the most brand loyal countries in Europe. In 2003 they estimated that own brand share remained relatively low at 12-20% vs. estimates of 35-40% in the UK, 31% in Germany and 24% in France. Mintel (2003)
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[301] Personal interview with Hugh MacKeown
[302] Collated from RGDATA (1992), Mintel (2000a) Petrol Forecourt Retailing in Ireland. London: Mintel International Group, Retail News (2007b), White (2001), Checkout (2004-2009), Shelflife (2010), BWG (2001)
[303] Collated from A C Nielsen, Competition Authority (2008), Kantar Worldpanel (2010 cf Checkout 2010).
[304] Bord Bia (2010b)
[305] Personal interviews with Pat Fox, Hugh MacKeown, Sharon Buckley and Chris Martin
[306] For example, Keencost developed Caterer's Choice, BWG Chef's Kitchen and Musgraves a food brand Musgraves Excellence and Musgrave Professional for non-food
[307] The level of flexibility varied by wholesaler and symbol
[308] Personal interviews Edel Clancy, Hugh MacKeown and Seamus Scally
[309] Personal Interview with Musgraves employee
[310] The Irish Times. (2005). RTE Show Has Balance Problem. p. 14
[311] Shelflife. (2006b, March 2006). Opinion. Shelflife, 4
[312] Compiled from Musgraves Annual Reports 1991and 2000
[313] Musgraves Annual Report 2005
[314] White (2001). p.103.
[315] Musgraves Annual Report 1997
[316] Murphy, D. (17th September, 1998). Roches, Musgrave Unite to Fight UK Threat. Irish Independent
[317] Personal interview with Musgrave employee
[318] Centra Supermarkets, Centra Food Markets and Centra Quick Stop. Musgraves Annual Report 1997
[319] Personal Interview with Derek Mansfield
[320] Musgraves Annual Report 1997 describes it thus: *Day-Today is an integrated package for support for independents doing business with the cash and carry including store identity system, marketing support, retail management and training advice*
[321] Personal interviews with Sharon Buckley and Noel Keeley
[322] Musgraves Annual Report 2000
[323] Musgraves Annual Report 2004
[324] Musgrave Annual Report 1993
[325] Checkout. (2004c, May 2004). Musgrave's favourite to land Londis UK as owners pocket €47K Checkout, 30, 4
[326] Personal interview with Hugh MacKeown
[327] Musgrave Group Strategy Document (1996). Serving the Progressive Independent Retailer and Caterer
[328] Personal interviews with Chris Martin, Donal Horgan, Noel Keeley
[329] Quinn (2002)
[330] The sale was delayed to tie in the Newhill Group which owned many SPAR properties and 26% of BWG
[331] Checkout. (2006c, January). SPAR Supplement. Checkout, 32
[332] BWG (2001)
[333] Personal interview with Aidan Morrison
[334] Checkout. (2004a, September). Appetite for Construction. Checkout, 30, 48
[335] BWG (2001)
[336] Ruddy, J. (November 2010). Going for Growth. Checkout, 39, 18-20
[337] Ibid
[338] Retail News. (2005a). 2005 - the Year in Retail. Retail News, 12-20
[339] Retail News. (2007c, Jan / Feb 2007). Mangan's Celebrate 75th Anniversary. Retail News, 21
[340] Checkout (2004b, June). p. 6
[341] Personal interviews with Pat Fox, Noel Keeley, Willie O'Byrne and Seamus Scally
[342] Checkout. (2010d). Recession Busters. Checkout, 39, 14-1
[343] Ibid
[344] Personal interview with Sarah O'Mahony
[345] Shelflife. (2004a, August 2004). Setting up His Stall. . Shelflife, 24-25
[346] Shelflife. (2008, May 2008). Londis in Acquisition Mode. Shelflife, 22-23
[347] Checkout. (2009e, October). What's over the Horizon? Checkout, 35, 20-21
[348] Shelflife. (2006, March 2006). All in a Year's Work. Shelflife, 24-26
[349] Personal interview with Willie O'Byrne
[350] Personal interview with Donal Horgan
[351] Collated from Retail News "A Half Century of Retailing"(2007b), White (2001), personal interview with Joe Barrett

[352] Mintel (2006). Food Retailing. London: Mintel International Group
[353] Personal interviews with Derek Mansfield, Tara Clifford and Edel Russell
[354] Personal interviews with Tara Clifford, Sarah O'Mahony, Edel Russell and Suzanne Weldon
[355] This is reflected in trade press, yearbooks and newspaper articles and advertising
[356] Personal interviews with Pat Fox, Peter Kealy and Seamus Scally
[357] Personal interviews with Edel Clancy
[358] Musgraves took a second community sponsorship for Centra in 1997. Homemaker of the Year was discontinued after two years
[359] Personal interviews with Sharon Buckley, Sarah O'Mahony and Willie O'Byrne
[360] Personal interviews with Hugh MacKeown and Seamus Scally
[361] Personal interviews with Sandra Looney, Chris Martin and Norma O'Sullivan
[362] Personal interview with Norma O'Sullivan
[363] Personal interview with Musgrave employee
[364] Personal interviews Peter Kealy, Donal Horgan, Chris Martin
[365] Personal interviews with Derek Mansfield and Pat Fox
[366] Personal interviews with Pat Fox, Willie O'Byrne, Joe Barrett, Seamus Scally
[367] These include wholesaler purchasing power; flexibility of relationship; local competition; own brand range; brand strength, positioning and image; support and training; existing trading relationships; and people
[368] Personal interview with Suzanne Weldon
[369] Personal interview with Pat Fox
[370] Personal interviews with Seamus Scally, Noel Keeley, Peter Kealy and Michael Kelleher
[371] This was reported in interviews with Suzanne Weldon and Willie O'Byrne and can also be seen in trade magazines
[372] Personal interviews with Joe Barrett, Pat Fox, Seamus Scally
[373] Personal interviews with Donal Horgan and Chris Martin
[374] Ibid
[375] Personal interviews with Musgrave's employee
[376] Personal interview with Sharon Buckley and Donal Horgan
[377] Personal interview with Tim Nolan and Kingsley Dempsey
[378] Personal interviews with Pat Fox and Derek Mansfield
[379] Personal interviews with Pat Fox and Edel Russell
[380] Personal interviews with Pat Fox and Edel Russell
[381] Personal interviews with Joe Barrett, Donal Horgan and Pat Fox
[382] These were targeted at different lifestyles and locations and included Kitsu Noodle Bar, Treehouse Smoothies, Signature Sandwiches, Crisp 'n Crunch Salad Bar and Tim Hortons donuts. Not all were successful
[383] Personal interview with Peter Kealy
[384] Mintel (2006)
[385] Brands included Marks & Spencer Simply Food and Superquinn Select
[386] Mintel International Group Ltd. (2004). Irish Lifestyles. London: Mintel International Group
[387] Ibid
[388] Personal interview with Joe Barrett
[389] Personal interview with Suzanne Weldon
[390] Shelflife. (2004b, Londis Special Issue (Londis 1954-2004). What's in the brand? Shelflife, 18-19
[391] Personal interview with Joe Barrett
[392] Mintel. (2000a)
[393] Retail News. (2006b). Gala Grows in Clones. Retail News, 74-75
[394] Personal interviews with Chris Martin, Noel Keeley and Seamus Scally
[395] Personal interview with Chris Martin
[396] Personal interviews with Sharon Buckley and Noel Keeley
[397] From unpublished communication to the Competition Authority in 2007. Musgrave Group
[398] Mintel (2003)
[399] Personal interview with Donal Horgan
[400] Mintel (2003)
[401] Personal interviews with Tara Clifford and Sharon Buckley
[402] Personal interview with Donal Horgan and Peter Kealy
[403] Checkout. (2007a, December). The Discounter Impact. Checkout, 33, 40-43
[404] Compiled from www.dairygold.ie/History. www.glanbia.com/history. Irish Independent (1999, June 19th). Allegro, Gillespie link up in defensive market share move. Carey, B. (2011, 14th August). Jacob's marches down the aisle. The Sunday Times. Carolan, M. (2009). Kerry Group wins appeal over Breeo. Irish Times. Hancock, C. (2007). Origin takes full control of Odlums in €35m deal. Irish Times, p. 17. Hancock,

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[405] The Competition (Amendment) Act repealed the Groceries Orders 1956-1987 and amended the Competition Act 2002 with specific reference to the grocery goods

[406] The Grocery Monitor Project was undertaken by the Competition Authority to review the response of the grocery retail and wholesale trade to the new legislative environment

[407] Checkout. (2009d). Symbol 'Independence' Unclear to Consumers? Checkout, 35, 8

[408] Black, F. (2011, 27th January). Own-Brand Products Selling Like Hot Cakes. Irish Independent

[409] Leonard (2011)

[410] For example Londis formed an alignment with Nisa-Today giving them exclusive access to the Heritage range of own brand products. Checkout (2009e) 35, 20-21

[411] In 2010 Multiples share had grown to 66%, symbol groups had fallen to 25% and independents to 9%. Kantar Worldpanel (2010)

[412] The Irish Times (2008). Lidl Proves the Cheapest in Price Survey of Groceries. p.3

[413] Personal interview with Willie O'Byrne

[414] Checkout. (2010f). Supplier Accounts Show Change for Good Impact. Checkout, 36, 10

[415] A C Nielsen (2010)

[416] Personal interview with Hugh MacKeown

[417] Personal interviews with Chris Martin, Willie O'Byrne and Sarah O'Mahony, November 7th 2011

[418] Personal interview with Chris Martin

[419] The Four Quadrants are analogous to Olin's (1989,2003) four vectors by which the brand manifests itself

[420] Personal interviews with Donal Horgan and Chris Martin

[421] Personal interview with Willie O'Byrne

[422] Compiled from Musgraves Annual Reports 1991, 2001, 2010

[423] The Musgrave Family Constitution (2007)

[424] Personal interview with Chris Martin

[425] Musgrave Annual Report 2010

[426] Personal interviews with Sandra Looney and Norma O'Sullivan

[427] Personal interview with Donal Horgan

[428] Personal interviews with Noel Keeley

[429] Personal interview with Chris Martin

[430] For example, Noel Keeley and Michael Kelleher both describe the growth in the Asian market from zero to €12 million in 3 years.

[431] Personal interviews with Sharon Buckley and Noel Keeley

[432] Bord Bia (2010a)

[433] O'Brien, C. (2011a, 12th October). Musgrave Sets up Unit to Run Superquinn. The Irish Times.

[434] Personal interview with senior Musgrave employee

[435] Checkout. (2007b) 33, 10

[436] BWG (2001)

[437] Kehoe, G. & Daly, I. (2008). Business Winners Emerge from the Doldrums. Sunday Business Post

[438] Personal interview with Willie O'Byrne

[439] Ibid

[440] Clohisey is a major shareholder in BWG and owns a portfolio of SPAR outlets

[441] Personal interview Suzanne Weldon

[442] Shelflife. (2010b). Investing in the Positive. Shelflife, 23

[443] Personal interview with Sarah O'Mahoney

[444] Ibid

[445] Checkout. (2009b, December). Discount Dreams. Checkout, 35, 44-45

[446] Checkout. (2010a, June). Fighting the Good Fight. Checkout, 36, 10

[447] Ibid

[448] Shelflife. (2010a, April). The Barry Group Wins Prestigious Deloitte Award. Shelflife, 12

[449] Personal interview with Sarah O'Mahoney

[450] Ibid.

[451] Checkout Yearbook & Buyer's Guide 2010/11. (2010). Dun Laoghaire: Vesey Publications

[452] Retail News. (2010c, July / August 2010). Gala Opens New HQ. Retail News, 14

[453] Checkout. (2009a, February). Brand New. Checkout, 35, 50-51

[454] Checkout. (2009c, September). Nisa Deal Good for Londis? Checkout, 35, 6

[455] Shelflife. (2010c, December). Londis: Building Relationships and Understanding Customer Needs. 48-49

[456] Checkout. (2009e October)
[457] Senior executives from both Musgraves and BWG observed the lack of expertise in bespoke brand consultancy in Ireland. Musgraves have an ongoing relationship with Interbrand a leading global consultancy to help develop their move to a brand centric organization
[458] Personal interview with Noel Keeley
[459] Personal interview with Donal Horgan, Philip MacKeown and Sharon Buckley
[460] Personal interviews with Chris Martin, Donal Horgan and Philip MacKeown
[461] Personal interviews with Chris Martin, Sharon Buckley and Willie O'Byrne
[462] Personal interview with Tara Clifford and Ciaran O'Reilly
[463] Personal interviews with Donal Horgan, Chris Martin and Willie O'Byrne
[464] Personal interviews Sharon Buckley, Donal Horgan, Noel Keeley, Sandra Looney and Chris Martin
[465] Personal interviews with Donal Horgan, Sharon Buckley, Suzanne Weldon, Willie O'Byrne, Peter Kealy, Pat Fox and Seamus Scally
[466] Personal interview with Musgrave employee
[467] Personal interviews with Donal Horgan, Sharon Buckley and Bord Bia (2010a)
[468] Personal interviews with Donal Horgan, Willie O'Byrne and Sarah O'Mahoney
[469] Checkout. (2010g). Top 100 Brands 2010. Checkout, 30, 20-142
[470] Personal interviews with Chris Martin, Sharon Buckley, Mitchel Barry and Willie O'Byrne
[471] Personal interview with Chris Martin and Willie O'Byrne
[472] Carey (2011)
[473] Competition Authority (2009)
[474] Gorecki, P. K. (2009). The Kerry/Breeo Merger: Two Views of Countervailing Buyer Power--the Competition Authority and the High Court. European Competition Journal, 5(2), 585-612
[475] McKeever, F. (2012). Ireland: Food for Thought: Consolidation in Irish Food and Drinks Markets Continues in 2011 Increased Scrutiny from European Commission and NCAs Expected
[476] Flanagan, P. (2011, July 14). 'Fair Trade' Is Necessary If We Want the Retail Sector to Continue Thriving. Irish Independent
[477] Personal interviews with Hugh MacKeown, Seamus Scally and Willie O'Byrne

CHAPTER 5 CASE STUDY: IRISH TELECOMMUNICATIONS INDUSTRY

5.1 CASE INTRODUCTION

Viewed as a public utility until the 1980s the Irish telecoms industry has evolved from a state operated monopoly to a fiercely competitive industry. Historically branding was not a feature of telecoms and the dominant paradigm was voice telephony transmitted across a Plain Old Telephone Systems (POTS). Since branding emerged in the industry many types of brand have been created and exploited from promotional to global corporate brands. Brand management has become integral to company strategy and brand appreciated as an instrument in building shareholder value. Pretty awesome new services (PANS) have displaced POTS funded and managed by the private operators with telephony becoming an application on a digital infrastructure.

There has been ample research on the evolution of telecoms industries and drivers of change include: transformations in policy and regulatory regimes; competition; costs; access to financial markets; and changing consumer preferences[1]. This narrative explores the evolution of the Irish industry and the influence of brand on this process. Similar to the previous chapter it commences with the product of the evolutionary process, the industry today, before exploring the influence of brand across the value chain since the arrival of telephony in Ireland.

5.2 THE INDUSTRY TODAY

The telecoms industry is fragmented with many firms active across its markets whilst convergence of technology has created opportunity for new types of competitor. Industry competitors include multi-national companies (MNCs), international and local telcos the last including Eircom designated as Universal Service Provider (USP). Shareholder demands, the growth of VoIP[2], competition, the impact of recession and sophisticated buyer behaviour have driven down prices accelerating a trend towards voice commoditization and falling margins.

The boundaries of the industry described in Section 3.6.2 encompass telcos providing fixed and mobile voice and data services bounded by NACE Division 61 (see Appendix C). The value chain includes infrastructure, handset and device suppliers, content and application providers, fixed and mobile service providers (telcos), wholesalers, aggregators and retail channels. Some telcos are vertically integrated, others operate more narrowly and interconnect and roaming agreements create internal markets. Some telcos have wholesale divisions supplying telcos competing with their own retail brands. Technology convergence has caused telcos previously identified as fixed, mobile or broadcast to compete across sectors eroding functional differences between brands. PANS infrastructures enable fast transfer of data, WiFi has democratized the Internet and smartphones[3] and mobile operating systems have redefined customer relationships with telecoms shifting the balance of power[4]. Telcos own the customer base but the emotional bond resides with the 'brand in

the hand'[5] triggering a danger of telcos becoming 'dumb pipes' in the value chain[6]. Competition is predicated on 'speed and price' with service increasingly outsourced. Core competencies are rooted in network construction and management not the emerging domains of content creation and smartphone design. Retail outlets are primarily telco owned selling products and services including subsidized handsets to access fixed and mobile networks.

5.2.1 Industry Composition

There were 461 authorized operators in September 2012, not all commercially active, of which 58 account for over 95% of an industry revenue of €3.73bn. This is broken down by sector in Table 5-1. Employment in 2009 was 14,200 and average personnel costs €53,300[7].

	2012
Total Revenue (€bn)	3.73
Fixed line (%)	53
Mobile (%)	42
Broadcast (%)	5

Table 5-1 Telecoms Market Composition[8]

Building a picture of active brands, market concentration and market shares is hindered by the granularity of publicly available data. Telcos with more than one brand report a consolidated figure to ComReg who only reveal shares of 2% or over and telcos utilize proprietary information and data mining for greater clarity[9]. Market shares are shown in Table 5-2. Eircom accounts for around 40% of total industry revenues. Other authorised operators (OAOs) are fixed line operators offering fixed telephony (sometimes over VoIP), Internet and call card services and brands include Verizon, Magnet and Blueface. Mobile Virtual Network Operators (MVNO) brands shown as OAO mobile include Tesco Mobile and Postfone.

Company	Fixed Revenue Market Share	Fixed Broadband Market Share	Mobile Market Share (including Broadband)
Eircom	53%	41%	20%[1]
Vodafone	7%	17%	40%
UPC	8%	27%	-
O_2	< 2%	<2 %	28%
BT	15%	< 2%	-
Three	-	-	9%
Imagine Group[2]	< 2%	4%	-
Digiweb[3]	< 2%	3%	-
Cable & Wireless	3%	< 2%	-
OAO[4]	15%	8%	3%

Table 5-2 Market Shares in Telecoms Industry 2012[10]

Note: (1) e-Mobile and Meteor brands (2) Imagine, Access, GAA Telecom and IFA Telecom brands (3) Digiweb and Smart Telecom brands (4) Some MVNO sales may be attributed to wholesaling operators.

The supply chain is fragmented and differs by sector. Broadband and WiFi have accelerated convergence of mobile and fixed with upstream suppliers increasing in scale and scope spawning new types of brands such as Android and Apple OS and VoIP brands including Skype. Handset innovation has facilitated growth in these applications and brand owners extract significant value from the industry. Mobile network operators (MNOs) control most of their distribution channel through vertically integrated retailers and in common with fixed telcos operate online and direct sales operations.

Since 2004 telecoms have accounted for approximately 3% of GDP[11]. The market is liberalized but regulatory control is maintained at the EU and national level. Communications costs fell 5.4% in the year to September 2012 and by 20% since 2007[12] with mobile Average Revenue per User (ARPU) falling 32% over the same period[13]. Trade associations operate at industry and sectoral levels serving an advocacy role to influence government, NGOs and the media around issues of common interest such as public policy and health[14].

5.2.2 Branding in the Industry Today

Branding is ubiquitous in the industry with corporate brand architecture[15] the dominant model. Explicitly understood as strategic assets, brands are not operationally managed at senior management level but are directed by company boards[16]. Marketing is the locus for brand management wherein branding capabilities are important. Interest in internal branding is variable, dependent on the CEO[17]. Overall telcos are market and customer, not brand, orientated.

Customer affinity with telco brands is eroding and convergence across multiple technologies has resulted in issues of brand stretch. Brand equity acquired in one segment helps telcos gain consideration, pulling them into new territories. For MNOs retail outlets are the face of brand experience while in corporate business and public sector professional sales teams serve this role as trust is an important determinant in choice. Apple and Samsung smartphones, Tesco's MVNO and UPC's broadband service are examples of companies leveraging their core competency and brand essence to enter and disrupt markets thereby redefining customer relationships. Although Tesco has had limited success UPC is synonymous with broadband and the Apple iPhone was a 'game-changer' in mobile. Smartphone brands have become the most powerful brand in the value chain[18].

High levels of marcoms are a feature of the industry using a spectrum of channels including social media[19]. Media spend fell from €88 million in 2008 to €55 million in 2011, a shift in emphasis towards digital and media deflation accounting for some of the decline. Over 500 telecoms advertisers were recorded between 2007 and 2012 encompassing 40 network operators plus handset, content and other aligned services. Ninety-three percent of telco spend across this period was attributable to the top ten brands reaching 98% in 2012 (see Table 5-3). In an industry where

Share of Voice (SOV) is a lead indicator of brand consideration a fall in SOV can impact market share.

Advertiser	SOV 2007 - 2012	SOV 2011 - 2012
Vodafone	20%	15%
Eircom	17%	21%
Three	15%	18%
Meteor	14%	10%
O_2	14%	10%
UPC	8%	15%
Tesco Mobile	4%	6%
BT	2%	1%
Imagine	1%	1%
Telefónica	<1%	1%
All Others	5%	2%

Table 5-3 Share of Voice Telecoms Brands 2007-2012[20]

Handset brands' media spend at €32m is about 10% of telcos'. This excludes marcoms support provided by the telcos to fulfil contractual obligations and borrow equity from handset brands to build their own. Table 5-4 shows share of voice for the leading handsets brands since 2007.

	SOV 2007 -2012
Apple	28%
Samsung	25%
Nokia	24%
Sony	7%
Htc	5%
LG Electronics	3%
Sony Ericsson	3%
Motorola	3%
Blackberry	1%

Table 5-4 Share of Voice Handset Brands 2007-2012[21]

The value of strong brands is accepted but no interviewee could attribute a monetary value to their brand. Internationally brand value is measured with Vodafone the most valuable telecoms brand in the world[22]. Brands acquired through acquisition are not attributed any value because the strategy is generally to migrate them into corporate brand architectures. Measurement of brand equity is ubiquitous amongst core firms and despite measuring rational and emotional attributes there is a functional approach to interpreting these data predicated on the technology-based culture of the industry. Net Promoter Score has become the preeminent brand equity metric embedding brand related metrics into the process of managing customer experience[23].

5.3 THE NATURAL MONOPOLY 1880-1983

"Until the 1980s the conventional wisdom was that the telecoms industry should be regarded as a 'natural monopoly'"[24]. The monopoly carrier model emerged in the USA and Europe when governments forced telco nationalisation. The Irish monopoly started in the post office with civil servants building and managing the infrastructure and consumer premises equipment (CPE). Tariffs were set to cover costs with no profit objective and brands were not an element of the industry. Challenges to monopoly telecoms providers also started in the USA and migrated to Europe driven by acceleration in technological innovation, high installation costs, political attitudes towards competition and business' demands for improved services. International correspondence relationships with overseas telcos formed the focus for the emergence of competition[25]. The legacy of the state monopoly had a long-term impact on industry structure, the types of brand in the industry and the incumbents' relationship with stakeholders.

5.3.1 The Early Years 1880-1975

In 1880 Ireland's first telephone switching system was established by the United Telephone Company in Dublin[26]. The service became a monopoly following the 1905 Telegraphy Act[27]. With the foundation of the Irish Free State in 1922 the Department of Posts and Telegraphs (P&T) assumed control of telecoms[28]. Responsibility rested with the Minister for Posts and Telegraphs with telecoms policy subordinate to industrial and social policy[29]. Throughout the 1930s the P&T expanded its telegraphy, telephony, telex and facsimile services[30]. During World War II transport difficulties increased telephony usage but the P&T was unable to meet demand[31]. In 1945 the Government approved plans to improve services but demand exceeded supply resulting in waiting lists[32]. Call offices were opened in rural sub-post offices stimulating demand and domestic usage[33].

By 1960 the P&T employed over 4,000 people in telecoms but telephone density[34] and call rates remained low relative to other developed countries[35]. Telecoms provided *"...an essential service to commerce, industry and society"*[36] including limited data services for corporate customers. Until 1969/1970 the P&T recovered the costs of the system but then began to operate at a loss[37]. Revenue was generated from telephone calls and rental and miscellaneous activities including telegram and telex (see Table 5-5). By 1975 telecoms accounted for 90% of the P&T's deficit[38] and they could not sustain investment in new technologies[39].

	1950	1960	1970	1975
Telephone Rental	29	28	26	25
Telephone Calls	69	71	74	70
Miscellaneous	2	1	0	5

Table 5-5 P&T Share of Turnover 1950-1975[40]

5.3.2 The Establishment of Telecom Éireann

During the late 1970s a series of reports were commissioned to explore telecoms. P-E Consulting[41] noted the conflict between the commercial, political and social aspects of the organization stating the P&T was not *"in competition with others"* and B2B demand for telecoms was inelastic. They saw no need to stimulate demand reporting a *"waiting list of 40,000 potential subscribers"*[42]. The 1979 Dargan Report recommended the separation of postal and telecoms services stating *"the state of the telecommunications service constitutes a crisis"*[43]. It concluded that the civil service was an unsuitable structure for a telecoms business which required the application of modern business principles and an emphasis on marketing and customer service[44]. Conserving network integrity was a governing consideration and Dargan cautioned that selective competition could result in 'cream-skimming' against a public utility with general service obligations[45]. A decision was made to establish two state sponsored bodies to run post and telecoms with £650 million invested in upgrading telecoms[46]. Despite resistance by staff and unions An Bord Telecom was established in 1979 chaired by Michael Smurfit[47].

Responsibility for telecoms should have transferred in 1981 but did not occur until 1984. Political forces played a role in this delay along with a series of general elections in the early 1980s and civil service resistance. Bord Telecom would have a monopoly *"up to the connecting point in the subscriber's premises"* whilst the monopoly for CPE would remain with the Minister[48-49]. It would be structured to compete in an environment demanding *"sensitivity to customer requirements and marketing skills"*[50] to *"meet the industrial, commercial and social needs of the country for efficient telecommunications services"*[51]. Provision of loss making services would be compensated by the Minister[52]. Waiting lists grew as did media criticism of the P&T's philosophy towards customer services[53]. There was criticism in the Dail of Bord Telecom's occupancy of an office block at the cost of over £1 million[54] leased on the basis that the Bord would be established quickly and require a headquarters *"in keeping with a modern telecommunications administration"*[55]. On January 1st 1984 Telecom Éireann took control absorbing 17,260 civil servants[56] with an ethos unprepared for commercial operations, competition or change[57].

5.3.2.1 Brand and Marketing in the P&T

The P&T placed little emphasis on sales or marketing and no mention of brand was encountered in archival material. There is minimal evidence of identity building beyond livery, fascias and stationary. Some sales and marketing staff were employed[58] but their role is unclear. Gerry Fahy recalls that:

> *"Your objective was to build up infrastructure ... If no customer ever used it, it didn't impinge on what you were doing because you were removed from the customers. The company didn't really care about customers. It was a provider of infrastructure that people happened to use."*[59]

Celine Fitzgerald noted that:

> *"Brand clearly wasn't an issue. Marketing wasn't an issue. There were some sales people but they were administrative, they took orders. How can you sell something that you can't actually deliver?"*[60]

Internally the P&T were conscious of their name and role in society[61]. Externally it was associated with the poor service quality and difficulty in obtaining a phone[62].

By 1983 a trend towards developing corporate identities was emerging enabling owners or leaders to *"literally make their mark"*[63]. Both Smurfit and CEO Tom Byrnes were recruited from outside the civil service. Smurfit was seen to bring elements of entrepreneurial private business with him[64]. Byrnes had a more sophisticated understanding of corporate identity[65] and led the team developing an identity for Telecom Éireann[66]. Within days of launch employees noted that when turned upside down the logo looked like a snail reflecting their collective identity[67] although the rebrand signalled change. Physical rebranding happened gradually and Telecom Éireann was perceived simply as a name to distinguish it from An Post[68].

5.4 DRIVE FOR COMPETITION AND EMERGENCE OF MOBILE 1984-1994

Notwithstanding limited competition on international services[69] Telecom Éireann's monopoly remained intact. Forces driving change were technology and deregulation[70]. America began liberalizing in the early 1980s when entrepreneurs set up in competition to AT&T[71]. Ireland changed slowly despite being amongst the most inefficient operations in Europe. CPE was deregulated by 1992 impacting on phone rental revenues. Payphones were deregulated in 1990 becoming highly competitive within a year[72]. Increasing demand for telecoms, particularly in service industries, generated a lobby for change[73].

Changes abroad were observed by entrepreneurs with no telecoms experience including Denis O'Brien and Sean Melly

> *"You didn't need to be in the telecom industry, which I wasn't, to see big industry movements and plays. You saw that with deregulation matched with advances and changes in the economics of the technology that would allow you to get into that industry".*[74]

In 1991 O'Brien founded Esat Telecom[75] and Melly established TeleAtlantic Corporation[76] which became TCL in 1993[77], activity illustrative of entrepreneurs creating a sense of change which was amplified by the media[78]. Ireland's first Internet Service Provider (ISP) Postgem was launched by An Post in 1989[79] and Ireland-On-Line the first consumer[80] ISP launched in 1992[81]. Telecom Éireann's network was modernizing[82] and new technologies particularly mobile telephony introduced. The Dail legislated but EEC legislation (see Appendix D) particularly competition law had most impact[83]. To survive in a deregulated market Telecom Éireann needed to learn the skills of competition including branding but the Board was not brand orientated[84]. By 1994 the industry was open to international fixed line B2B competition[85] and the end of the mobile monopoly had been announced[86].

5.4.1 Industry Recipe 1984 - 1994

Telecom Éireann dominated the industry and little data exists on other firms. All domestic traffic was across Telecom Éireann's leased lines. In 1985 95% of Telecom Éireann income was generated by telephony falling to 87% in 1994[87]. Phone lines and household penetration grew as Telecom Éireann made efforts to reduce waiting lists (see Table 5-6) and stimulate traffic through marketing. Telecom Éireann was the only significant employer with 13,069 employees in 1994[88].

	1984	1986	1988	1990	1992	1994
Fixed Telephone Lines	601,000	746,000	811,000	983,000	1,1080,000	1,170,000
Waiting List	60,000	30,000	16,000	6,000	< 1,500	< 1,500
Household Penetration	n/a	50%	57%	64%	70%	71%
Mobile Phone Subscribers	0	300	3,500	13,800	34,000	61,000
Telecom Éireann Employees	17,260	15,850	14,560	14,215	13,325	13,069

Table 5-6 Changes in Telecoms Industry 1984-1994[89]

With Telecom Éireann's launch of a MNO branded Eircell in December 1985[90] an alternative infrastructure was established. A GSM[91] digital network was added in 1993 and Eircell had over 60,000 subscribers at the close of 1994. From 1986 cable operators were permitted to carry satellite services and RTE merged its cable operations to form Cablelink Ltd[92] the basis of a third infrastructure. In 1989 MMDS was licensed facilitating rural access to multichannel TV triggering mergers and the emergence of two regional brands Cablelink and Irish Multichannel. Telecom Éireann acquired 60% of Cablelink in 1989[93] increasing this to 75% in 1995[94].

In 1987 the EEC advocated the liberalization of European telecoms [95] signaling competition in Ireland[96]. The 'Services Directive' provided for the liberalization of value added services (VAS) including data, non-voice telephony and fixed line competition[97]. The 'Leased Line Directive'[98] obliged Telecom Éireann to supply leased lines to all licensed service providers[99]. The Council of Ministers approved plans for full liberalization by 1998 but Telecom Éireann, with government support, made a successful request for derogation for up to five years to improve the network[100].

Until 1992 consumer handsets were procured and fitted by Telecom Éireann but this came under pressure when new houses were wired with sockets[101]. Telecom Éireann retail stores (Telecentres) stocked handsets but these stores were designed for paying phone bills and were often in poor locations creating opportunities for independent retailers. Consumers were attached to handset features not brands[102] but mobile handsets began to create customer relationships supported by brand manufacturers.

5.4.2 Telecom Éireann - The First Decade

Telecom Éireann retained an engineering and technology focus[103] but marketing personnel grew from 14 in 1984 to 156 in 1987[104]. Smurfit wrote that an efficient commercial organization must *"emphasize a marketing approach to the development of services"* [105] but despite statements in annual reports describing *"customers as the vital asset"*[106] marketing remained a weak force[107] and little mentioned in official publications. Fergus McGovern replaced Byrnes as CEO in 1995[108] and under his leadership many products and services launched and branding increased[109]. Table 5-7 shows some of these branded innovations. Brands were created for joint venture companies and new products sold through Telecom Éireann channels. There was marketing input into Golden Pages[110] who produced the Telecom Éireann phone books distributed to subscribers[111]. They launched market research and database marketing services, recognising the importance of their customer base to growth without appreciating the power consumers exerted in competitive markets[112]. Prices fell and itemized billing increased customer awareness of service costs.

Year	Brand	Activity	Joint Venture	
1984	Freefone	Free service for caller—charged to called party	No	
1984	Telecard	International calls and internal trunk calls	No	
1984	Telecom Éireann Services	Research and Development Consultancy	No	
1985	Eirpac	B2B data services	No	
1985	TEIS	Terminal equipment provider	No	
1985	Eirmail	Electronic messaging service	No	
1986	Eircell	Mobile telephony service	No	
1987	Telemessage	Greeting message service	No	
1987	Broadcom Eireann Research	Research in telecoms market development	Yes	113
1988	Phoneplus	Added value telephone services	No	
1988	Telecom Éireann Call Cards	Payphone payment mechanism	No	
1988	Eirpage	Marketing of radio paging service	Yes	114
1989	Telecentres	Retail sales operation	No	115
1990	Eircable Limited	Holding company for Cablelink	No	
1990	Eirtrade Limited	Electronic and data trading service	No	
1991	Minitel	Videotext services and terminals	Yes	116
1991	Telecom Phonewatch	Alarm monitoring service	Yes	117
1991	Ireland Direct	Overseas access to Irish operator services	No	118
1991	INET	Customer clearance facility	Yes	119
1991	Telecom Ireland	Marketing of Telecom Éireann services in USA	No	
1992	Telecom Database Marketing	Telemarketing service provider	No	
1992	Telecom Ireland Software	Development and sale of telecoms software	No	
1994	Minicall	Consumer paging service	Yes	120

Table 5-7 Branded Services Launched by Telecom Éireann 1984-1994[121]

There was growing awareness of brands in the semi-state companies and the 1990 rebrand of AIB Bank triggered interest in brand in service industries[122]. Telecom Éireann employees were entitled to paid study leave manifesting in many managers with MBAs *"talking the language of branding"*

but lacking operational understanding[123]. There was little senior leadership on brand facilitating brand proliferation as managers viewed each emerging technology as an opportunity for brand creation[124] without adequate research into whether the innovation was of interest to customers[125]. Alfie Kane, appointed CEO in April 1994, described this approach as *"value destruction"* and recalls finding little brand measurement in Telecom Éireann[126].

Marcoms supported every new brand and proposition with no clear process for allocating budgets or prioritising campaigns[127]. The corporate identity was enhanced by PR, sponsorships and corporate publications. The Board was cognizant of their remit *"to provide a service for the community"*[128] influencing their choice of sponsorship and CSR properties. Appendix K illustrates some of these activities and brand building advertising campaigns. But the brand was vulnerable on price and customer service which was exploited by international business competition[129]. The brand was hit by a second property scandal which generated significant media interest and after an initial report was issued by the Minister for Communications in October 1991 Smurfit resigned[130].

Employees were initially proud of Telecom Éireann perceiving it to be *"a more progressive organization"*[131]. An internal communications unit was established in 1984[132] but Telecom Éireann's culture was slow to change[133]. New core values were described as important[134] but interviewees recollect no engagement programme. Gerry O'Sullivan[135] started to explore the role of brand in internal change and found support from Kane[136] who observed:

> *"The brand was an enabler; the real issue was the DNA of the company... Telecom Éireann was inward looking ... Customer wasn't mentioned in meetings... You have to focus outwards on the customer, the market and the competition. Brand is a vehicle for changing the DNA, the culture of the company"*[137].

5.4.2.1 The Start of Eircell

Eircell was established as a division of Telecom Éireann to sell mobile telephony. The analogue or 088[138] network was initially restricted to car phones operating around Dublin with a limited choice of expensive handsets[139]. The network expanded, subscribers increased, handsets became more accessible offering features not available on fixed line but requiring specialist programming[140]. Telecentres sold Eircell but independent approved agents formed the majority of the channel[141]. GSM handsets used a SIM[142] removing the need for programming and offering improved functionality. Motorola was the most popular brand on analogue[143] but Nokia became the stronger brand in GSM[144]. Pat Ryan, General Manager of Eircell, had some appreciation of brand but it was rarely discussed by management. Eircell differentiated mobile from fixed but the main branding device, a blue logo, was so resonant of Telecom Éireann that it failed even to do this adequately. As it was hard to get fixed lines installed mobile enabled customers to access telephony a benefit the Eircell brand communicated[145]. Eircell grew rapidly (See Appendix L) but had only 2%

market penetration by the end of 1994[146]. When the end of the mobile monopoly was announced in 1993 Eircell prepared for competition.

5.4.3 A New Type of Entrepreneur

Telecoms attracted entrepreneurs who exploited legislation to its limits, pushed for deregulation in Dublin and Brussels and fought Telecom Éireann. They knew that to build a base they must deliver lower prices and reassure business buyers that they could deliver a quality service. To be credible they needed a brand and to support it through marketing[147]. In addition to Esat and TCL, discussed below, brands launched included: Access; GTS Telecoms; Imagine; ITG; and Swiftcall[148].

The Nascence of Esat

The Esat brand is linked with the personality of Denis O'Brien. He had international business experience and in 1986 formed Éireann Satellite (Esat) to launch a satellite shopping channel[149]. In 1989 he won a radio license for Classic Hits 98FM[150]. The model used to build this business was his template for Esat Telecom and Esat Digifone[151]. He recruited and empowered young, enthusiastic managers and staff supported by external consultants[152], engaging advertising agencies early and exploiting every opportunity to create brand awareness[153]. He cultivated his image as a leader and expected employees to *"constantly enhance the brand he wanted to convey to the public"*[154].

After founding Esat Telecom O'Brien travelled to the USA to explore telecoms developments[155] and met Doug Goldschmidt an expert in regulatory affairs. He became Esat's first CEO and helped lobby for deregulation[156]. Esat applied for a license in 1991 but it was not until March 1993 that it was granted a VAS license for an international long distance business service[157]. Conscious they wanted their new brand noticed O'Brien insisted the logo was red, *"the most striking colour for a new brand"* which was described by Cathal Magee in Telecom Éireann as *"a brand that had ambition and dynamism"*[158]. The brand was launched to journalists a year before the customer launch in April 1994. Esat's media engagement strategy built their brand and impacted across the industry creating a sub-sector or *"the new telecoms industry"*[159]. Esat met resistance from Telecom Éireann who adopted legal tactics to restrict competitors[160] including delaying the provision of leased lines[161]. Autodiallers[162] sourced in America routed international calls directly to Esat's switch enabling customer recruitment without alerting Telecom Éireann[163].

The launch of TCL

Sean Melly worked in London and New York before identifying an arbitrage opportunity in international telephony. TeleAtlantic was a 'call back' service enabling Irish customers to access WorldCom's cheap long distance rates[164]. It allowed Melly to gain industry experience and build a customer base and in 1994 he returned to Ireland and launched TCL an international telco for the

corporate market. He was aware of the importance of brand, specifically a name and logo and undertook a *"very basic"* brand creation exercise, the brief being to make it futuristic and green to *"wrap ourselves in the flag"*. TCL was aggressive on price but customers were nervous of leaving Telecom Éireann so the brand had to *"lend credibility"*. As Telecom Éireann could not compete on price they undermined TCL by inferring they were likely to fail, a fate that befell many entrants[165]. TCL had limited resources for marketing and differentiated on customer service. While the media explored the battle between new telcos TCL saw Telecom Éireann as the competition and Esat as generating customer awareness of alternative suppliers[166].

5.5 COMPETITION AND LIBERATION 1995 - 2000

The second half of the 1990s saw significant change driven by deregulation and the growth in mobile and data[167]. Technology advances stimulated innovation[168], marketing activity and opportunities in distribution. Brand helped telcos communicate propositions to generate a customer base for innovations[169]. In 1995 the market was primarily fixed line telephony, dominated by Telecom Éireann which owned Eircell and competition restricted to international calls for corporate customers. Data although less regulated was minimal in relative scale[170]. By 2000: Telecom Éireann was in private ownership; Eircell a separate company; over 40 licensed companies were operating; SMS was an essential part of mobile communications; Esat[171] was sold to British Telecom (BT)[172]; and digital technologies were facilitating convergence between telecoms, broadcasting and computers[173]. Fixed, mobile and data were distinct strategic groups expanding the boundaries of the industry[174] and generating distinctive brands and distribution channels. Mobile spearheaded change in approaches to brand.

5.5.1 Industry Recipe 1995 - 2000

The industry was operating in an environment characterized by technological and social change. There was growing acceptance that as a small, open economy Ireland's development was not best served by an inefficient monopoly with a high cost base[175]. The government voluntarily dropped the derogation from the EC 'Full Competition Directive'[176] promoted by political concerns over lack of competitiveness as a venue for inward investment[177]. As new sectors emerged industry boundaries blurred challenging The Office of the Director of Telecommunication Regulation (ODTR) to identify discrete markets[178]. They deduced that there were fixed, interconnect and leased line markets and a mobile and mobile interconnect market[179] with close substitutes impacting on the level of rivalry and power within each[180]. Demand for telecoms surged, fixed line traffic growing by around 11% per annum fuelled by an influx of high tech MNCs[181] and call centres. Fixed connections grew by 48% and there was explosive growth in mobile penetration (see Table 5-8 and Appendix L). Utilizing various technologies data lines grew to almost 32,000 by 1999[182]. Telecom Éireann reduced headcount but industry employment grew stimulated by innovation and competition (see Table 5-8).

	1995	2000
Fixed Telephone Lines	1,240,000	1,593,000
Mobile Phone Subscribers	88,000	2,461,000
Employees	12,662	17,450

Table 5-8 Changes in Telecommunications Industry 1984-1992[183]

Telecom Éireann remained dominant holding 96% of fixed line revenue at the start of 1999 falling to around 80% by the end of 2000[184]. Their wholesale activities grew with telcos and resellers buying bulk minutes and leased lines from them[185]. Eircell became a separate company in April 1995 as competition law would not allow a state monopoly to operate in a competitive market[186]. They faced fierce competition from Esat Digifone from 1997 but retained 60% share in 2000[187]. In 1996 20% of Telecom Éireann was sold to KPN and Telia[188] enabled by the Telecommunications (Miscellaneous Provisions) Act, 1996. This established the ODTR replacing the Minister of Communications as industry regulator[189]. Telecom Éireann had a universal service obligation including telephony, emergency services and public call boxes. It had over 70% share of the payphone market its closest competitor ITG growing to 25%[190] after acquiring Trexco and Telephone Company of Ireland[191]. In 1998 the government instructed Telecom Éireann and RTE to sell their shares in Cablelink which supplied 340,000 homes believing vested interests were curbing developments in cable[192]. The company was sold to NTL for £535 million in 1999[193].

Mobile competition was intended to stimulate the base and reduce tariffs[194]. It fuelled an explosion in demand for mobile phones which were becoming affordable in part due to network subsidies[195]. Mobile evolved from the preserve of business customers to a *"consumer necessity"*[196] enabled by independent retailers. By 2000 there were 198 specialist telecoms retail outlets[197] many of which were acquired by the MNOs. Non-specialist retailers such as supermarkets and video rental stores entered the handset market[198] but lacked specialist understanding of the industry[199]. Handset manufacturers launched new models to exploit emerging technologies and customer segments and invested in marketing and branding[200]. The MNOs attracted dynamic teams from within and outside the industry[201] and invested in building the market and their brands[202]. Mobile phone penetration grew from 2% in March 1995 to 51% by September 2000[203].

The ODTR's role was to regulate the development of the market by fostering competition, taking an independent stance in disputes between actors and facilitating consumer choice[204]. Etain Doyle was appointed Director of Communications in 1997 with an office populated by civil servants[205]. In anticipation of deregulation two types of license were created[206] which telcos could extend across their brand portfolio. In December 1998 21 General Licenses were distributed to companies including: Telecom Eireann, Esat Telecom, Eircell, Ocean Communications, WorldCom, Cable and Wireless, Cablelink and NTL[207] and eight Basic licenses were distributed[208]. Within a year the

number of licensees had increased to 40 General and 22 Basic, and 24 General and 17 Basic holders had commenced operation[209]. Telcos began to acquire ISP providers and launch data services starting a convergence of brands within the industry and by the end of 2000 96% of businesses and a third of households had Internet connections[210]. In a race to achieve critical mass the end of the century saw significant global merger and acquisition activity impacting the Irish industry. These included WorldCom acquiring MCI in 1997[211] and Scandinavian telcos Telenor and Telia agreeing to merge[212]. Vodafone's mergers with Airtouch and Mannesmann in 2000 gave them a presence in 12 European countries[213].

Marketers were recruited into telecoms and investment in marcoms increased so that by 2000 expenditure on advertising alone was £23 million[214] and advertising and brand agencies created image and strategy for brands. Table 5-9 shows key brands operating between 1995 and 2000. Brand started to become a board level issue[215] and brand tracking measured rudimentary parameters such as awareness and loyalty[216]. From a customer perspective the increase in telcos with multiple branded products and services made purchase decisions difficult. Complex tariff structures made it hard to establish value for money in fixed and mobile acting as a barrier to switching although the cost of telephony was perceived to[217] and did fall[218].

Owner	Main Brand	Note
Fixed Line Telephony		
BT	BT	
Cable & Wireless	Cable & Wireless	
Esat Telecom	Esat Telecom	
Global Telesystems (GTS)	ITG	
KDD Japan	Swiftcall	
MCI Worldcom	MCI Worldcom	
Ocean Communications	Ocean	
TCL	TCL Worldcom	Rebranded MCI WorldCom
Telecom Éireann / Eircom	Telecom Éireann / Eircom	Rebranded Eircom in 1999
Mobile		
Telecom Éireann / Eircell Ltd	Eircell	
Esat Digifone	Esat Digifone	Rebranded Digifone
Cellular 3	Imagine	MVNO
Interoute	Spirit	MVNO
Cable		
Cablelink	Cablelink	Sold to NTL
Irish Multichannel	Irish Multichannel	Rebranded Chorus
NTL	NTL	

Table 5-9 Main Brands in Industry 1995 - 2000[219]

5.5.1.1 Power of Suppliers and Retailers

Eircom retained a strong position in fixed line controlling wholesale pricing and maintaining a direct relationship with customers through ownership of the local loop. After the removal of the infrastructure monopoly Esat Telecom negotiated with CIE to roll out their fibre optic network and Ocean had access to the ESB infrastructure[220]. From January 2000 carrier pre-selection (CPS) gave customers a seamless connection with their chosen telco[221] but with no economic driver for handset innovation brands were not important in fixed telephony[222].

MNOs needed to increase their customer base to generate return on investment precipitating handset subsidisation to stimulate sales. Simultaneously network innovation drove demand for handsets that could leverage new capabilities. Subsidy and innovation triggered a war between handset brands and changes in the channel[223]. Nokia produced handsets with a user-friendly interface and consolidated their leadership[224]. Other manufacturers saw potential to extend their brands and Toshiba, Panasonic, Siemens and Mitsubishi were amongst those that entered the market although some did not support their brand and failed[225]. The growing domination of Nokia, Ericsson and Motorola owed much to the duopoly of Eircell and Digifone who restricted choice[226]. MNOs saw handsets as loosely connected to the service and were ambiguous about the benefit of handset branding[227]. Increasingly handsets became drivers of consumers' network choice[228]. The specialist retailers grew and exploited competition between MNOs to drive bonus payments[229] which incentivised them to encourage network switching. This "*sucked a lot of value out of the value chain*" and undermined MNO brand equity[230]. To control their cost of sale and build brand equity the MNOs started acquiring these retailers.

5.5.1.2 Proposition and Tariff Brands

Telcos branded marketing propositions and tariffs to identify innovations and help differentiation (see examples in Appendix M). Tariff brands should have helped customers determine value but the basis on which they were constructed made them hard to compare[231]. Significant marketing resource was invested in communicating tariffs but they never became true brands[232]. They helped shape customer perception of the core brand positioning[233], generated internal alignment around innovation and helped explain tariffs to employees and customers[234]. In mobile they increased network churn as customers chased value[235] while in fixed they contributed to awareness in falling telecoms costs[236].

5.5.2 Mobile Brand Wars

The brand war between Eircell and Esat Digifone grew the market beyond what was considered possible[237]. Innovation played a role but leadership was crucial and both were led by brand orientated charismatic men who thrived on high profile brand building activities[238]. The level of marketing activity impacted the profitability of both firms[239] but it stimulated new segments and

sub-brands and retail-type activities new to telecoms. Table 5-10 shows the growth of mobile between 1995 and April 2001[240]. The importance of Christmas gifting is evidenced by 400,000 handsets being sold in late 2000[241].

In 1998 applications for the third mobile license generated two submissions: Orange, a brand offering an all-island proposition; and Meteor. Independent experts ruled Meteor's bid better but the media judged that the Regulator had favoured an Irish company[242]. Legal action delayed the awarding of the license [243] until June 2000 by which time mobile penetration had grown to over 40%. Eircell and Esat Digifone built identities distinct from their parent brands'. Eircell's branding strategy created distance between itself and Telecom Éireann and Esat Digifone's brand equity became more salient than the Esat Telecom brand[244]. The level of trust in these networks was sustained through subsequent rebrands.

	1995	1996	1997	1998	1999	2000 (Apr)	2000 (Nov)	2000 (Dec)
Eircell	88,000	156,000	288,000	415,000	600,000	1,040,000	1,165,000	
Esat Digifone			76,000	130,000	239,000	610,000	765,000	
Total Users	88,000	156,000	364,000	545,000	839,000	1,650,000	1,930,000	2,461,000
User Penetration	2%	4%	10%	15%	22%	43%	51%	65%
Annual Growth	44%	80%	130%	89%	54%	97%		

Table 5-10 Growth in Mobile Phone Users (April 1995 to December 2000)[245]

Eircell

Stephen Brewer joined Eircell in October 1995 bringing a strong sense of the importance of leadership[246]. Contemporaries describe him as a 'genius in branding' with exceptional understanding of the power of brand and distribution[247]. He engaged with employees, politicians, the media and celebrities[248]. He was charismatic, decisive, encouraged risk taking and reinvented Eircell as a company and a brand seeing them as inextricably linked[249]. When he joined, Eircell had a similar culture to Telecom Éireann's and a weak brand described as 'Telecom Éireann light' and he modernized both[250]. His management style created tension but entrepreneurial, self-directed employees thrived and exceptional people were recruited[251]. In anticipation of competition Eircell was relaunched in 1996. The Identity Business encouraged a *"big brand"* approach and Brewer saw this as a way of reflecting and reinforcing organizational change[252]. The blue corporate colour was replaced with purple and the crescent shaped logo evolved into a smile. It was supported by intensive marcoms[253] and Eircell became associated with positive values[254].

Eircell responded to the launch of Esat Digifone and competition stimulated industry growth. Learning that Esat Digifone was preparing to launch prepay Eircell launched Ready to Go (RTG) in October 1997[255] utilizing capacity on their aging analogue network. Brewer wanted to create a

youth brand but was aware of the significant risk to the equity of Eircell should the initiative fail. Therefore the brand strategy was to create a distinct image and personality for RTG within the Eircell architecture[256]. RTG was targeted at the first time user and positioned as offering the freedom to talk without monthly bills[257]. Gerry Fahy tendered for branded handsets which were packaged in innovative boxes with SIM cards containing some phone credit. Its launch was supported by exceptional levels of spend[258] and by the end of 1997 70,000 handsets had been sold[259] giving RTG 16% of total mobile penetration. RTG digital was launched in March 1998[260] and when Esat Digifone entered prepay in October about 200,000 handsets had been sold[261].

Some of Telecom Éireann's best engineers joined Eircell and marketers were recruited from other sectors[262] facilitating an accelerated pace of network roll out and product launches[263]. In addition to supporting propositions there was investment in sponsorship[264] and brand communications[265] while corporate affairs positioned Brewer as an industry commentator[266]. There was little control of marketing expenditure[267] and in 1999 Davy Stockbrokers noted that Eircell's high marketing costs could contribute to their relatively low margin[268]. Customer services could not handle the volume of customers marketing generated and the function was outsourced to Rigney Dolphin. This circumvented a recruitment embargo and introduced a cohort of operatives who became integral to delivering the brand experience[269]. By 2000 Eircell employed 800 people, carried 4.5 million conversations per day[270] and was one of Ireland's most recognised brands[271]. Branding was seen as a marketing capability and brand measurement was not an organizational strength[272]. Eircell was demerged from Eircom in 2000 becoming Eircell 2000[273].

Esat Digifone

Denis O'Brien assembled a team of experts to tender for the mobile licence. Appreciating Esat were outsiders they decided to demonstrate their understanding of the market[274] and create a brand that would appeal to Ireland's young population. The Esat Digifone logo was multi-coloured to contrast with Eircell's purple[275]. The team started to secure planning permission on mast sites and commitments from distributors[276]. On the advice of PA Consulting Esat's holding company Communicorp negotiated a joint venture with Norwegian telco Telenor. Brand and advertising consultants were part of the tender team and to demonstrate marketing capability Esat transformed the delivery of the tender into an event including a Viking street parade[277]. When awarded the licence Esat Digifone was established as an autonomous company chaired by O'Brien with Barry Moloney and Knut Digerud as joint CEOs[278]. The award of the licence became subject to investigation by the Moriarty Tribunal in 1997[279].

The Esat Digifone launch was delayed causing them to miss the Christmas sales period[280]. They launched on 20th March 1996 with media events and advertising support[281] with branded handsets during the launch phase[282]. They claimed to have a better network and customer service and built a

national dealer network recruiting 45,000 customers in three months[283]. Their pre-pay brand Speakeasy was launched in November 1998 with two branded tariff options Early Bird and Night Owl designed to appeal to specific usage patterns[284]. Esat Digifone built a B2B organization with a portfolio of products[285] focusing on SMEs and developing affinity deals[286]. By September 1999 tensions between Esat Telecom and Telenor were mounting and Telenor removed the word Esat from Esat Digifone and attempted to remove O'Brien as chairman[287]. This resolved when BT acquired Esat Telecom in January 2000[288].

In 1997 Eircell agreed to supply Cellular 3 with mobile airtime for resale to their customers[289]. Cellular 3 was acquired by Meridian Communications who positioned their Imagine brand as an MVNO and resold airtime at a discount to Eircell. Believing this would damage their business and brand Eircell tried to terminate the arrangement, finally taking legal action[290]. Spirit launched an MVNO in 2000 purchasing airtime from Cellular 3[291]. By late 2000 MVNOs had less than 3% of subscribers[292]. In 2001 Justice O'Higgins ruled Eircell was not in a dominant position under competition law and Eircell cancelled its deal with Cellular 3[293]. Imagine and Spirit stopped supplying mobile in 2001[294].

5.5.2.1 Retail Brands Emerge

Entrepreneurs seized the opportunity in mobile phone retailing. The leaders were Let's Talk Phones (LTP), Person to Person (P2P), Cellular World and Carphone Warehouse (CPW). LTP was set up by Jonathan Stanley who asked Don Maher to join and they employed the Identity Business to design their brand[295]. After the launch of Esat Digifone they stocked both brands, built good relationships with handset manufacturers, measured simple brand metrics and built a strong customer service culture[296]. All the retailers used advertising and promotions to stimulate sales[297].

Retailer	Stores in 2000	Owned or acquired by:
Person to Person	31	Eircell
Cellular World	27	Esat Digifone
Let's Talk Phones	27	Eircell
Western Cellular	23	Eircell
The Carphone Warehouse	19	Remain independent
Eircom Stores	19	Eircom
Fone Zone	19	na
Midland Communications	13	Esat Digifone
Talk to Me	10	Eircell
Access Communications	10	Eircell
O'Hagan Technology	na	Eircell

Table 5-11 Main Specialist Retailers of Handsets in 2000[298]

By the end of 2000 the leading retailers with the exception of CPW had been acquired by Eircell or Esat Digifone (See Table 5-11). Most buy-outs included management contracts to retain retailing capability[299] which was not a core competency of the MNOs[300]. Esat Digifone terminated their contract with LTP when Eircell acquired it but although Digifone had accounted for 50% of sales it did not impact turnover and the sales team became passionate about the Eircell brand[301]. CPW became known as the only chain offering independent customer advice. Eircell's ambition was to bring the brand to life throughout their stores and Maher was tasked with creating a coherent culture and level of service across the acquired retailers[302].

5.5.3 Fixed Line Brand Wars

Until the end of 1998 competition was limited. New brands disrupted the market, gained media coverage, acquired customers but impacted little on market share[303]. Telecom Éireann and Esat Telecom were the most active brand builders, other telcos active in the international, data and interconnect markets devoting minimal resources to branding. An exception was WorldCom who bought 30% of TCL[304] encouraging them to use their logo to increase global brand presence. The WorldCom brand underpinned TCL's service offering and built customer confidence[305] creating a strong corporate customer base[306]. In 1997 WorldCom bought the remaining 70% of TCL retaining Melly to manage the operation. A strategic decision was made to remain B2B following deregulation due to the resources required in consumer branding[307].

As deregulation approached the opportunity to compete in the residential and SME markets saw new ventures enter the market. BT announced a joint venture with ESB called Ocean Communications[308]. It took responsibility for BT's customer base integrating the telecoms expertise of BT with ESB's infrastructure[309] and was ready to launch in December 1998. The fixed line market was deregulated on 1st December 1998 and immediately the industry started to fragment with new telcos and brands launched targeting every customer segment. Table 5-12 shows the proliferation of services available directly through telcos a year after deregulation but these brands also competed with service providers selling through call cards and resellers[310]. The trend continued in 2000 with telcos like Smart and cable operators NTL and Chorus entering the industry[311]. Two years after deregulation there were 77 licensed operators and 120,000 customers using CPS but Eircom controlled 80% of the market[312] and many entrants had failed[313].

Residential competition generated intense brand activity. Telecom Éireann's brand was disliked unlike Esat whose positive image had transferred from mobile. Ocean launched a range of products with a simple pricing structure[314] and the brand was heavily supported but short lived. When BT bought Esat Telecom the joint venture partners threatened legal action and BT bought and integrated Ocean[315]. Spirit launched in 1999 utilizing Internet Protocol (IP) technology enabling them to undercut competition[316]. The Irish Times review of the six brands active in

residential telephony in September 1999[317] noted: conflicting marketing claims; that diversity of tariff structures made price comparison difficult; access mechanisms acted as a barrier to entry[318]; and most customers stayed with Eircom.

	International		Long Distance		Local	
Operator's Brand	**Business**	**Residential**	**Business**	**Residential**	**Business**	**Residential**
Cable & Wireless	1	x	1	x	1	x
Eircom	1	1	1	1	1	1
Esat Telecom	1	1	1	1	1	1
GTS (ITL)	1	x	1	x	1	x
Swiftcall	x	1	x	1	x	1
MCI WorldCom	1	x	1	x	1	x
Ocean	1	1	1	1	1	1
Worldlink	1	1	1	1	x	x
Stentor	1	x	x	x	x	x
Totals	8	5	7	5	6	4

Table 5-12 Public Voice Operators December 1999[319]

5.5.3.1 Telecom Éireann Competition, Privatisation and Rebranding

In 1995 Telecom Éireann received guidelines for negotiating a strategic alliance[320] and Dutch KPN and Swedish Telia were chosen. Following the alliance management personnel were transferred to work on projects in Telecom Éireann[321] bringing industry and brand expertise[322]. The fact that Telecom Éireann was the *"best known brand in Ireland"* was included in the alliance negotiation and had been achieved through marcoms authorized by an increasingly brand aware leadership[323]. The company had evolved into *"a very high tech company"* but was viewed as *"a staid company that put a line into homes or businesses"*[324]. To increase credibility with corporates they repositioned their brand through B2B brand activities including Ireland's Information Age Town, a competition designed to accelerate the country's move into the information economy[325]. They integrated Minitel Communications into Eirtrade[326], acquired Motorola's share of Eirpage[327] and purchased LAN Communications[328]. Their Internet presence increased with the acquisition of ISP Indigo and the launch of Rondomondo a digital media publishing house[329]. Yet the culture was resistant to change and political considerations still influenced board appointments[330]. To facilitate privatisation the company and State negotiated an Employee Share Ownership Plan (ESOP) with the unions enabling the transfer of 14.9% of the company to employees[331].

The privatisation of Telecom Éireann remains the biggest privatisation in Irish history[332]. In February 1999 the Minister for Public Enterprise announced that shares would be listed on the Dublin, London and New York stock exchanges[333]. In June the government confirmed it would sell its entire stake and KPN and Telia exercised their option to increase their shareholding to

35%[334]. The government wanted the public to buy shares and explicitly briefed the advertising agency to generate maximum retail demand[335] stimulating applications from 574,000 individuals which was facilitated by 55% of the offering being allocated to retail[336]. On 8th July Telecom Éireann became a public company with over 300,000 people buying shares[337].

Telecom Éireann was rebranded Eircom on 6th September following a process initiated by a tender for a corporate review[338]. The brief asked for an identity audit and recommendations for a branding strategy appropriate for the new business environment. The Identity Business won the account and their audit resulted in their recommending a name change because Telecom Éireann was "*the most hated brand in Ireland*"[339]. Employees felt little loyalty and customers saw it as bureaucratic, static and amateur[340]. The brand was a liability[341]. Kane grasped the potential to use this as a catalyst for change and got board approval[342].

The new brand, Eircom, was positioned as dynamic and energetic[343]. The brand audit found more than 100 product names[344] and the rebrand *"spring cleaned"* the portfolio[345]. The Eircell brand was retained because cultural change had already happened and to facilitate future divestment decisions. The brand architecture was Eircom, Eircom Multimedia and Eircell[346]. Kane wanted to rebrand before privatisation but that proved impractical for political reasons and because it would not enable internalization[347] during which employees were engaged through workshops exploring new brand values[348]. The logistics of the physical change culminated on launch day when the changeover commenced. It was enacted over three months supported by a massive communications campaign[349]. Eircom's investment in brand building continued including a sponsorship deal with the Football Association of Ireland[350] and naming rights for the national football stadium[351] which, although never built, created huge media coverage.

Eircom shares fell below their floatation price on 15th September and in November KPN and Telia announced their intention to divest. Inexperienced investors were slow to sell shares which had fallen 30% below the floatation level by the end of the year, damaging the brand, increasing political pressure on Eircom management[352] and precipitating the sale of Eircell to Vodafone[353].

5.5.3.2 Esat Telecom's Growth and Sale

Esat Telecom crafted a challenger brand which it reinforced internally and externally[354]. They challenged the status quo through guerilla marketing[355] and led the provision of ISP services. It had strong marketing capability and used innovation and marcoms to build brand, customer numbers and traffic. The move into the residential market required investment in marketing but O'Brien was committed to breaking the monopoly[356]. A year before deregulation Esat Home was launched to build brand awareness and achieve a foothold in the market[357]. A division was established to develop a residential service branded Esat Clear which launched on deregulation

day[358]. It was targeted at high spending customers with tariffs offering savings of 10-15% against Telecom Éireann[359]. Postgem / Ireland on Line was acquired in 1999[360].

Esat Telecom launched an IPO in Europe and the USA in November 1997. They tendered for Cablelink seeing it as complementary to Esat Clear but NTL won the bid and a High Court attempt to block the sale failed[361]. On 1st December 1999 Telenor launched a hostile bid for Esat[362]. BT entered the takeover battle with a deal worth £270 million which was completed in January 2000[363]. Telenor sold their stake in Esat Digifone and Esat Telecom was delisted from the stock market. BT purchased Ocean and created Esat Business for B2B and Esat Fusion for consumer[364].

5.5.3.3 ISP and Internet Brands

The start of brands in the ISP market traces back to Telecom Éireann's Eirtrade and Eirmail in the mid 1980's. From 1995 the Internet business began to grow from its corporate base into SME and consumer[365]. Indigo built a strong brand and by 1997 had 9,000 subscribers and despite making no profit was bought by Telecom Éireann for £2.7 million[366]. Esat Telecom acquired EuNet and NASC Teoranta rebranding them Esat Net[367] and merging it with Postgem/IOL[368]. Ocean was first to introduce a subscription-free Internet service into the consumer market in 1999 forcing the market to follow[369]. MNOs saw the potential for data services that emerging technologies would facilitate and began to develop branded Internet services. Esat Digifone launched Digifone-on-Line Ireland's first fully integrated fixed ISP and portal in September 1999[370]. Brewer announced the arrival of the mobile Internet by demonstrating WAP phones on RTE's Late Late Show in October 1999[371]. Research found that consumers understood neither the technology nor the benefit of the mobile Internet[372] and Eircell created a brand, E-Merge to communicate it[373]. E-Merge launched in May 2000 supported by marcoms that generated awareness and trial. But usage was low due to poor functionality[374]. A joint venture between Chorus and INM resulted in the first TV, Internet and telephony service branded Unison in 2000[375].

5.6 THE CELTIC TIGER YEARS 2001-2006

The impact of market liberalisation and new technologies continued to shape the industry. Each technology was productised, branded and supported, only to be superseded by another wave of innovation. Sophisticated buyers understood the underlying technology but most customers were interested only in how it enhanced connectivity and delivered value for money. Convergence of telecoms and media became a reality yet each sector behaved as parallel industries fighting for share[376]. Innovation in fixed line revolved around broadband and VoIP emerged as a viable telephony substitute[377]. In mobile text was the vanguard of the move to data creating unit price transparency that impacted on the value perception of brands[378]. The launch of GPRS and 3G expanded data carrying capability stimulating handset innovation and the mobile content industry.

In 2002 the ODTR was superseded by the Commission for Communications Regulation (ComReg) replacing the Director with a triumvirate of Regulators[379]. An early intervention addressed low broadband uptake by mandating the introduction of FRIACO[380] forcing Eircom to launch retail and wholesale FRIACO products[381]. Full Mobile Number Portability (FMNP) arrived in 2003 causing MNOs to re-focus from acquisition to retention[382]. It was an era of growth in Ireland characterised by conspicuous consumption and brands. This presented a challenge for telcos whose product was invisible. The Irish brands that had shaped mobile were replaced by global brands and two MNOs entered the market, Meteor and Three[383], stimulating competition without breaking the dominance of Vodafone and O_2. A more systematic approach to brand management emerged and brand was acknowledged as valuable by senior managers. These were turbulent years for Eircom and many of their competitors relied on them for some or all of their network requirements. Concepts such as double- and triple- play[384] became part of the vernacular and while traditional telcos struggled to create compelling media offerings cable operators started to transform into a significant force.

5.6.1 Industry Recipe 2001 - 2006

Firms, customers and other stakeholders perceived mobile and fixed as distinct industries with no brand encompassing all services. As the economy boomed the population grew[385], ethnic markets emerged and there was dramatic growth in new dwellings particularly for 1 and 2 person households[386]. By late 2004 mobile and fixed ownership were equal and by 2006 mobile phone penetration exceeded 111%[387]. Social media began to expand with Bebo emerging as early market leader in social networking. Demand for telecoms infrastructures capable of delivering data capabilities in fixed and mobile were a corollary of the boom for enterprise customers [388] where changing work patterns increased the requirement for external access to data. Table 5-13 shows an overview of the structure of the industry during this period.

	2001	2002	2003	2004	2005	2006
Total Revenue (€bn)	3.26	3.44	3.68	4.00	3.92	4.29
Fixed line (%)	64	60	55	48	48	50
Mobile (%)	32	36	40	48	47	46
Broadcast (%)	4	4	4	4	4	4
Mobile Phone Penetration (%)	79	79	87	64	102	111
ARPU (€)	45e	45	47	47	48	45
Household Internet Penetration (%)	33	na	34	38	45	48
Household Fixed Broadband Penetration (%)	0	0.1	0.5	2.5	4.4	8.8
Cable / MMDS Subscriptions (000)	613	552	na	530	569	na
Employment in Industry (000)	17.0	15.6	14.7	14.5	13.3(e)	13.3(e)

Table 5-13 Structure of Telecoms Market 2001-2006[389]

Encouraged by the windfalls in European markets a 'beauty contest' was initiated for the sale of four 3G licenses in December 2001[390]. The Type A licence was awarded to Hutchinson-Whampoa

signalling the entrance of Three. Vodafone, O_2 and Smart were awarded Type B licences. Smart's licence was rescinded in 2006[391] and later awarded to Meteor. The replacement of Irish MNOs by British brands raised the question of whether Irish MNOs were *"little more than switches and cell sites"*[392]. CEOs Paul Donovan (Vodafone) and Danuta Gray (O_2) were brand orientated[393] and engaged with the media to stress their operations' Irish credentials and retained some local marcoms and sponsorships. Vodafone and O_2 were required by their global parents to release quarterly results which moved discussions from market share to profitability[394]. The media saw high ARPU and profitability relative to other EC operations, new entrants and fixed line telcos forcing Vodafone and O_2 to devote resources to minimizing reputational damage[395].

There was pressure to increase data speeds and reduce prices and ComReg wanted to stimulate competition and protect customers. Media engagement with the industry remained high acting as a conduit for announcing initiatives but challenging infrastructure quality, the slow roll out of broadband and price. The entry of global MNOs drove some entrepreneurial spirit out of mobile whereas in fixed and broadband entrepreneurism juxtaposed with Eircom and international telcos. Firms in each sector attempted to provide content but the cable companies had an advantage over telcos whose core competencies were in telecoms. Telcos devoted resources to brand creation, measurement and management and brought brand to life through products, customer care and sales. In addition to recruiting local brand experts branding capability was available through parent companies and brand agencies[396]. MNO brands maintained high levels of media spend making it hard for new entrants to create an impression. By 2006 the mobile companies were aware that they needed to augment their mobile services with broadband and re-enter the fixed telephony market.

5.6.1.1 The Fixed Line Market

In the deregulated market barriers to entry were lowered but there was a constant requirement to have modern infrastructures to facilitate data usage through narrowband and later broadband. While some telcos had the resources and capabilities to invest others did not. Some built their own infrastructure others relied on wholesale lines. The emergence of a wholesale division helped Eircom to maintain over three quarters of the market until 2005 (see Table 5-14).

	2001	2002	2003	2004	2005	2006
Eircom	79	80	80	80	78	71
OAO	21	20	20	20	22	29

Table 5-14 Share of Fixed Line Revenue 2001-2007[397]

Despite awareness of CPS levels of switching by domestic customers and SMEs remained low. The number of brands in the market, many with undifferentiated propositions, helps explain Eircom's resilience as does customer inertia and residual brand loyalty. Getting a picture of the telcos and brands active is difficult as published lists of fixed service providers contain a blend of

telcos, trading brands, call card operators and Internet specialists. Table 5-15 illustrates some of the brands competing during this period.

Competitors active in Industry
Access Telecom, ATS Voice Ltd, Blueface, Blue Square Telecom, BT Ireland, BuyTel, Cable & Wireless, Cinergi Telecom, Colt Telecom, Chorus, Chorus NTL, Direct Dial Telecom, Eircom, Energis, Esat BT, Euphony, Gaelic Telecom, Hibercall, IFA Telecom, MCI, Newtel, NTL, OLO Telecom, Perlico Communications, Pure Telecom, Ryanair Telecom, Smart Telecom Switchcom, Swiftcall, Talk Talk, Tele2, Torc Telecom, UTVip, Valuetel, VarTec Telecom, Verizon, VOIP Ireland, Worldlink, Zefone

Table 5-15 Fixed Line Brands 2001-2006[398]

The earliest market share data encountered in ComReg reports was 2006 when they noted that Eircom had 71% share, five telcos accounted for a further 20% and 9% for all others[399]. The five telcos are not revealed but probably include: Esat BT / BT Ireland; Smart Telecom; Perlico; and the Imagine Group. These brands along withTele2 and Talk Talk (both acquired by CPW) and cable brands Chorus and NTL appear the most active brand builders. In the corporate sector Cable & Wireless and MCI (acquired by Verizon) were amongst the competitors.

The cable operators faced challenges. NTL was dogged by management and product problems[400] and was sold to Liberty Global (UPC Europe) in 2004[401]. INM divested its share in Chorus in 2004; which was acquired by UPC in 2005[402]. Both the NTL and Chorus brands had poor reputations for quality and customer service[403]. UPC believed that *"jettisoning two toxic brands"* would not build the business and invested in infrastructure and brand differentiators[404]. In addition to competing with telcos cable operators had satellite broadcaster BSkyB (rebranded Sky) competing in pay TV. They had a reputation for superior content than Chorus and NTL and their brand was significantly more valuable.

5.6.1.2 The Mobile Market

Mobile was competitive and steadily augmenting voice and text with data. Eircell and Digifone were rebranded and the red of Vodafone and blue of O_2 became ubiquitous. The arrival of Meteor in 2001, FMNP in 2003, Three in 2005 and national roaming agreements between MNOs lowered customer barriers to change. But ARPU remained high, the incumbents retained dominant shares (see Table 5-16) and MVNOs were kept out of the market.

By 2005 84% of consumers had a mobile phone with 4% having more than one subscription[405]. Prepay accounted for over 70% of the market[406]. Despite FMNP average ports per quarter from 2005 were less than 2% of subscriptions[407]. Churn figures were a key metric with ports in and out being analysed on a brand and customer segment basis and related to marketing activities[408]. The

MNOs maintained investment in marcoms, being amongst the highest spending brands in the country. Vodafone consistently had the highest SOV in the industry. For example in 2006 Vodafone's share was 30%, Meteor 27%, O_2 26% and Three 17%[409].

	2001	2002	2003	2004	2005	2006
Vodafone	58	57	55	53	49	47
O_2	40	39	40	40	41	37
Meteor	2	4	5	7	10	16
Three	0	0	0	0	0	0
Total	100	100	100	100	100	100
ARPU (€)	45e	45	47	47	48	45

Table 5-16 Market Share (Subscribers) of MNO Brands (2001-2006)[410]

Investment in infrastructure needed customer traffic to generate shareholder return and this required the transformation of technologies into propositions. Terms such as GPRS, 3G and PCMCIA did not stimulate customer interest or explain benefits so the MNOs created brands to exploit each technology. Typically products launched first in enterprise, then postpay and finally prepay consumers. This way the brands maintained a sense of leadership with higher value customers and optimised investment in brand support. For example, GPRS was launched as Vodafone Emailanywhere to enterprise customers in 2002[411] and Vodafone live! to consumers later that year[412]. The PCMCIA card was launched as Vodafone Mobile Connect Card in 2003[413] and the 3G Mobile Connect Card signalled Vodafone's entry into 3G in 2004. Each initiative was matched by competition, for example O_2 launched O_2 Active as a GPRS brand in 2003[414]. Vodafone was usually first but O_2 led with Blackberry which they exploited in enterprise[415].

FMNP removed the ability to identify network through the prefix but for MNOs the most profitable way to stimulate usage was through 'on net' offers on voice and text. High market share gave Vodafone and O_2 an advantage but Meteor was often first to reduce price, attracting communities of users particularly younger, low value customers while high value customers rejected the brand. Demand for handset upgrades remained high as innovation reinvigorated the industry and handsets were enhanced with cameras, data and other services[416]. Handset specification was important in the choice of MNO, the range of handset brands contributing to overall brand perception. Customers switched networks for a specific handset[417]. Most retail outlets were MNO owned and branded[418] an integral part of the brand experience and accounting for most consumer and SME sales.

Handsets were a visible manifestation of brand choice, Nokia and Blackberry being particularly successful in generating demand[419] and Nokia described as *"the epitome of a successful brand"*[420]. The financial burden of handset subsidies continued and global telcos explored ways to leverage their buying power through central sourcing and exclusive handsets. This was a limited success as

decentralized governance structures and local brand preferences undermined attempts at consolidation[421]. Handset brands were supported by manufacturers and through cooperative marcoms. Despite this the MNO brands remained strong and competed with handsets to be guarantor of quality.

5.6.2 Brand Capabilities and Support

Telcos used experts to manage external and internal manifestations of brand. Located in marketing, managers responsible for brand fought to create brand orientated cultures in organizations that were technology and sales driven[422]. Eircom had a new brand and the Vodafone and O_2 rebrands were directed by corporate parents committed to consistent brand architectures and identities. Sophisticated tools were introduced to facilitate brand management. Reputation management, customer experience and internal communications were managed separately from 'brand' despite tacit acceptance they contributed to brand equity. Brand equity was measured through quantitative brand surveys augmented by qualitative research with metrics such as awareness, preference and consideration as standard. These helped to understand the strengths of core drivers such as coverage, price, relevance and loyalty[423]. The surveys evolved to incorporate more analytics but some senior managers failed to see a relationship between these metrics and business performance[424]. Measurement highlighted the conflict between the fast pace of telecoms where short term sales figures drove the business with slower moving brand metrics.

Competition and multiple propositions presented media planning, creative and budgetary challenges. This complexity is illustrated by Vodafone running 16 campaigns in 2006 plus sponsorship, events, loyalty schemes, promotions, CRM campaigns, retail marcoms and CSR[425]. Vodafone, O_2 and Three utilized global creative materials augmented with Irish properties. The Internet emerged as a brand building media with digital marketing becoming integral to campaign planning. The intensity of marcoms created a barrier for fixed and Internet operators and forced up media costs. Brands competed to secure sponsorship properties which were advertised to build the corporate brand[426] and provided a vehicle to entertain enterprise customers and key influencers[427]. CSR activities were also evident. For Eircom it was part of their community heritage but in the MNOs it was generally lower profile encompassing local and globally mandated undertakings. Appendix N illustrates a selection of sponsorship and CSR properties. Retail outlets helped build a branded experience through merchandising, design and customer service but in customer care, especially enterprise, it was predicated on the brand representative[428].

5.6.3 The Zenith of the Mobile Brands

Competition between MNOs was intense. Innovation matched innovation, price competition was endemic and brand battles were a critical element in the struggle for market share.

Vodafone

The sale of Eircell to Vodafone was completed in August 2001, Eircom shareholders getting Vodafone shares in a ratio 1000/1[429]. No value was attributed to the Eircell brand in the acquisition as Vodafone were building one global brand[430]. Paul Donovan became CEO and Vodafone brought benefits including scale in the supply chain and new products[431]. The rebrand was executed in stages starting with dual Eircell Vodafone branding to transfer Eircell's equity to Vodafone[432]. Awareness of Vodafone was helped by advertising spill-in and their sponsorship of Manchester United[433]. Internal engagement was critical starting with the senior managers meeting the founders of Vodafone who inspired them with the brand story[434]. The global 'vision and values' internal communications programme was localized[435] and the retail channel united around a desirable brand[436]. By February 22nd 2002 all traces of Eircell were removed[437], a rebrand campaign was initiated[438] and 42 Vodafone stores unveiled. The process was so successful it became the template for Vodafone globally[439].

Vodafone insisted on adherence to a corporate brand architecture. The RTG brand was phased out and new sub-brands created within the guidelines. From 2003 the focus of consumer marcoms moved to demand stimulation and data services under the Vodafone live! sub-brand. It was developed to meet an organizational need to bundle disparate services rather than consumer insight and struggled to have practical impact[440]. The brand was transferred to enterprise embodying a belief that Vodafone could define the boundaries of their industry and control Internet access[441]. However, Vodafone lacked adequate content creation competencies[442]. Industry leadership was integral to Vodafone's brand and Donovan was an effective ambassador[443]. Teresa Elder replaced Donovan in 2005 and was less effective at reputation building[444]. Announcements of high ARPU levels fuelled media comment but did not damage brand health[445]. Bespoke propositions were created for enterprise customers and supported by segment specific account management and marcoms. Vodafone was *"a big corporate brand talking to other big corporate brands"* [446] but was also brand leader in consumer.

In 2005 Vodafone's global brand team instigated a rebranding process as part of a long-term differentiation programme. The brand values were replaced with a values-based brand essence and a new corporate logo and brand identifiers introduced. Global CEO Arun Sarin launched the rebrand at a cross functional event attended by members of a programme team established by Elder and led by the HR Director. This was part of a brand internalization process predicated on building customer engagement which became integral to business planning and communications[447]. Parts of the organization could not relate the language or process with business realities yet even senior managers were afraid to openly criticize what was perceived as a global management dictate[448].

O_2

BT Wireless was demerged from BT in 2001 forming MMO2 Plc with a new customer brand O_2[449]. O_2 rebranded in all markets in spring 2002, the brand having *"no legacy, or brand attributes"*[450]. The Digifone brand disappeared although Speakeasy initially remained for prepay[451]. The Esat Digifone culture was replaced with a measured, corporate culture. O_2 was judged as a top company to work for[452], a reputation it retained throughout the leadership of Gray[453]. O_2 had limited focus on internal branding and an informal process of embedding values. They tried to close the gap on Vodafone with whom it shared a similar customer profile[454]. It did so without truly forcing down prices possibly due to its significant contribution to MMO2 operating profits[455]. Data offered a point of differentiation and O_2 exploited the benefits of SMS[456] declaring itself 'The Home of Text'. Branded enterprise data initiatives included O_2 Extended Office[457] and O_2 Wireless Zone a WiFi service[458]. O_2 saw WiFi as strategically important and built a hotspot footprint organically and in partnership with Bitbuzz[459]. O_2's strength in enterprise was through the Blackberry brand. In consumer O_2 Active was replaced by I-Mode in 2005 through an alliance with NTT DoCoMo[460].

MMO2 was acquired by Spanish operator Telefónica in 2006[461]. Around that time O_2 abolished roaming charges between Ireland and the UK [462] to which Vodafone responded immediately[463]. In addition to investment in advertising O_2 were committed to sponsorship as a brand building strategy[464] including an ongoing relationship with Irish rugby from 2002[465]. Digifone's bond with youth eroded as O_2 engaged enterprise customers with activities such as golf sponsorships. This contributed to a *"businessy feel"* and by 2006 it had "disconnected from youth" causing share loss and re-focusing of its sponsorship strategy around sport and music properties[466].

Meteor

When Meteor launched in February 2001 it faced *"the almost impossible task"* of catching up with the existing MNOs[467] who had penetrated 70% of the market, created strong brands and tied up the retail channel[468]. Their delayed launch eroded technological advantages and their quality and coverage were perceived as inferior. Meteor's launch strategy failed to differentiate them so when Stewart Sheriff became CEO in 2002 he refocused around voice and text and *"relentlessly pursued a value positioning"*[469]. The brand appealed to young buyers but was unattractive to quality seekers and enterprise customers[470]. The arrival of FMNP offered Meteor a growth opportunity but quality concerns inhibited switching. A national roaming agreement with O_2 gave Meteor coverage equal to theirs[471] but their positioning strategy had created a negative image for many customers[472].

In 2005 Eircom acquired Meteor as a vehicle to re-enter mobile in a deal approved by the Competition Authority[473]. Eircom's finance director Philip Lynch admired the manner in which Eircell had flourished as a separate business and insisted Meteor remain separate from Eircom[474]. Meteor saw an opportunity to build on the territory of social bonding amongst 25-34 year olds as a

differentiator[475]. They expanded their retail footprint and staffed stores with young people[476]. Advertising was developed appealing to the Irish sense of humour and the Meteor Ireland Music Awards was a successful positioning sponsorship. Their pricing activity impacted on the relative value perceptions of Vodafone and O_2 who had to respond to Meteor's activity.

Three Ireland

The awarding of the Type A licence to Three concerned other MNOs aware of their disruptive business strategy in other markets[477]. Three contracted Esat BT to build the initial stages of its network[478] and instigated a low level launch in September 2003 to comply with its licence[479]. The consumer brand launch was delayed until July 2005 as they built their 3G network and negotiated a roaming agreement with Vodafone to provide GSM coverage[480]. Their entry into pre-pay with 3Pay saw a step-change in activity[481]. As the fourth entrant they needed to be different and they positioned themselves as a mobile media content provider with competitive prices[482]. With no need to protect voice and text revenues Three were able to create a different type of business model[483] and challenged the status quo with initiatives such as the Skyperphone and mobile broadband[484]. Customer experiences of the inferior Meteor network at launch inhibited trial of any new network[485]. They built a retail footprint in key locations[486] but were slow to build customers and accrued significant financial losses[487].

5.6.4 Fighting the Eircom Monolith

Eircom had to fight battles on many fronts with: shareholders; other telcos; the Regulator; and its employees. Its core revenue generator, voice telephony, was under pressure from competition and the emergence of VoIP. They were prohibited from re-entering the mobile market until 2004. Despite retaining a dominant SOV amongst fixed providers[488] brand building was not the priority.

Eircom

The collapse of the share price precipitated a takeover of Eircom by the Valentia Consortium, the resignation of Kane and appointment of a new Board chaired by Sir Anthony O'Reilly[489]. They restructured the multimedia division and sold off non-core assets including the retail outlets and Golden Pages. In 2004 Valentia changed its name to Eircom Group Ltd. and returned to the stock market[490]. Eircom failed to maintain investment levels in the infrastructure and its quality eroded[491]. However their ownership of the local loop enabled them to retain relationships with competitors' customers. Relationships with their wholesale customers were complex:

> *"In most cases Eircom's retail competitors are also wholesale customers. Esat BT is a retail competitor, a wholesale customer and competes with Eircom on a wholesale basis"*[492].

In the 2005 Annual Report O'Reilly expounded customer centricity as key to making brands great[493] and infers customer expectations were not always met[494]. Speculation on their re-entry to

mobile was resolved with the purchase of Meteor but the brand was a poor fit with Eircom's customer base. Eircom failed to meet demand for broadband services but they introduced Eircom WiFi hotspots across the country. A change of management occurred in 2006 when Babcock & Brown acquired Eircom (ESOP retained their shares)[495] and Eircom was delisted from the stock market. There is little evidence of internal branding during this era. The Eircom brand maintained a level of trust externally[496] and internally the culture was similar to Telecom Éireann's.

Esat BT / BT Ireland

Esat was rebranded Esat BT in 2002[497]. Despite speculation that the consumer and SME division was to be sold[498] BT saw value in remaining in this market[499]. The corporate brand served as an umbrella for marcoms predicated on building understanding of products and services[500]. The Esat BT Young Scientist and Technology Competition served a cause related marketing objective while generating high levels of awareness[501]. Esat BT positioned itself as a provider of converged services aiming to get *"deep into the heart of [their] customer's IT infrastructure"*[502]. Esat BT was rebranded BT Ireland in 2005 to *"capitalise fully on the global BT brand"*[503]. Their focus moved towards wholesale and the provision of leased lines and data services to enterprise. By the end of 2005 they had a 20% market share in enterprise and 40% in the corporate market and had clearly signalled their future was as a broadband, infrastructure and ICT solutions company[504].

Perlico

Entrepreneur Iain McDonald established Perlico[505] which launched fixed telephony and Internet services in 2002 using Eircom's infrastructure[506]. Unencumbered with the *"first mover disadvantage"* of the post deregulation entrants[507] they invested in creating a distinctive consumer brand. The base grew but acquisition costs were high and in 2005 they adopted a direct marketing approach[508]. This grew their base from 10,000 to 90,000 by the end of 2006 making them Ireland's second largest broadband provider[509]. Network problems and disruptions impacted negatively on customer experience and Perlico was perceived as a cheap, poor quality brand[510].

Other fixed line brands

Smart Telecom was an enterprise telco that entered consumer in 2002 through acquiring Chorus' phone card business and Alphyra's and Esat BT's payphone operations[511]. By 2004 they were the third largest fixed line telco. Smart rolled out a broadband fibre network piggybacking on public assets rather than wholesaling from Eircom[512]. However Smart was beset by problems in 2006 losing its 3G mobile licence and having telephony services to 45,000 customers withdrawn by Eircom. This undermined customer confidence in all OAOs making them more likely to remain with Eircom[513]. Smart was sold to its main shareholder for €1[514] and refocused on broadband. Tele2 entered the market in 2004 with a no-frills brand[515]. They acquired 40,000 customers but accumulated losses and were sold to CPW in 2005[516] who had acquired VarTec in 2004.

Customers were migrated onto CPW's Talk Talk for voice and broadband. Digiweb started as an Internet company in 1997 and evolved into a telecoms company when Colm Piercy introduced satellite broadband in 2002[517]. Lacking financial resource to invest in marketing he built his business through referrals and guerrilla marketing[518]. Digiweb extended its footprint and launched Metro broadband in 2005[519]. The Imagine brand disappeared after the closure of its MVNO but entrepreneur Sean Bolger re-invented the brand within the multi-brand Imagine Group. This included Access Telecom (a rebrand of GTS Telecom)[520], Gaelic Telecom and IFA Telecom (affinity offers) and the Imagine brand relaunched in 2005 for the consumer broadband market. Magnet Networks launched in 2005 and acquired specialist business services broadband supplier Leap Broadband in 2005 and ISP Netsource in 2006[521], all merged to form Magnet Business[522]. Many other telcos including international brands such as AT&T, Cable & Wireless, Colt and MCI were active in the industry. Alliances between local telcos and international telcos were common and customers often had a relationship with a number of telcos.

5.7 CONVERGENCE AND GROWTH OF DATA 2007- 2012

Recession put pressure on costs and heightened awareness of value forcing down prices and accelerating voice commoditization. A telecoms infrastructure capable of carrying fast data services became a national imperative and part of government policy which Eircom were ill-equipped to deliver. Convergence between technologies and diversification strategies saw telcos competing across multiple platforms reducing the affinity between brands and technologies. The need to stay connected to the Internet, especially email and social media, was facilitated by the reinvention of smartphones by Apple in 2007[523], disrupting the value chain and shifting the balance of power in favour of handset manufacturers[524]. The launch of Tesco Mobile in late 2007 signaled the re-entry of MVNOs.

5.7.1 Industry Recipe

Ireland changed in the wake of the banking crisis, impacting every part of business and society[525]. Industry revenues declined (see Table 5-17 and Table 5-18) as customers sought to reduce costs. Increasingly telephone calls originated on mobiles (See Table 5-17) and telephony became a component in bundled services. The debate on price continued in the media and in 2010 Vodafone and O_2 were labelled as *"among the purveyors of Rip Off Ireland"*[526]. Disruptive new entrants and aggressive marketing by smaller telcos challenged brand loyalty and industry dynamics[527].

Through under investment by Eircom in infrastructure Ireland fell behind in broadband deployment[528]. Deployment of Next Generation Broadband (NGB) became a political priority and in 2008 Minister Eamon Ryan stated that Ireland required *"a truly national broadband infrastructure"*[529]. Infrastructure was built but speed targets were not delivered. Minister Pat Rabitte unveiled a National Broadband plan in August 2012 describing it as *"the rural*

electrification of the 21st Century"[530]. Telcos faced problems monetizing Over the Top (OTT) data on their infrastructures. Branded suppliers including Microsoft, Google, Apple and other cloud based services generated vast usage which they did not fund[531]. Infrastructure alliances formed between telcos[532] improving customer experience but eroding coverage or quality advantages.

	2007	2008	2009	2010	2011	2012
Total Revenue (€bn)	4.54	4.52	4.04	3.86	3.82	3.73
Fixed line (%)	50	49	50	51	52	53
Mobile (%)	46	47	45	44	43	42
Broadcast (%)	4	4	5	5	5	5
Mobile Penetration (%)	115	114	108	105	107	107
Mobile Penetration incl. BB (%)	118	121	119	118	120	119
Household Broadband Penetration (Fixed and Mobile (%)	31		54		65	65
Call Origination						
Fixed	49	42	43	40	38	35
Mobile	52	58	57	60	62	65

Table 5-17 Structure of Telecommunications Market 2007-20012[533]

The brands in the industry and their territory evolved due to: consolidation; WiFi, smartphones and tablets; rebranding; MVNOs; double-, triple- and quad-play bundles; and marketing. Figures published by ComReg show Eircom's declining share of fixed line and broadband (see Table 5-18) but less clarity on the firms making up the OAOs. Intermittent publication of market shares facilitate an overview of some competing brands (see Table 5-19)[534]. In December 2011 Eircom had 57% of fixed line, Imagine Group (Imagine, Access and Gaelic Telecom) 13%, Vodafone 7% and the remaining 23% shared by all other brands.

Operator		2007	2008	2009	2010	2011	2012
Eircom	Fixed Line	69	68	67	62	57	53
OAO		31	32	33	38	53	47
Eircom	Broadband	50	51	50	49	46	42
OAO		50	49	50	51	54	58

Table 5-18 Share of Fixed Line and Broadband Revenue 2007-2012[535]

Brands with 1% share or more of a Fixed Voice or Internet Market
Blueface, BT Ireland, Cable & Wireless, Chorus NTL, Clearwire, Eircom, Digiweb, Euphony, IFA Telecom, Imagine, Last Mile, Magnet, Perlico, Pure Telecom, Smart TalkTalk /Tele2, UPC, Verizon, Vodafone

Table 5-19 Fixed Line Brands 2007-2012[536]

MNOs and handset manufacturers *"spectacularly failed"*[537] to bring the Internet to mobile and were vulnerable to entrants who understood the emerging paradigm in IT and small screen

technology[538]. Smartphones became integrated communications devices and customer desire for them enabled MNOs to migrate customers onto post pay (see Table 5-20) and introduce longer contracts. The cost of subsidizing smartphones impacted margins forcing MNOs to reduce other costs[539] while discounted data bundles contributed to ARPU decline (See 5-20). Yet incumbent MNOs remained resilient to MVNOs[540] (Table 5-20).

Leading telcos invested in media and sponsorship, their combined SOV acting as a barrier to entry. With increasing focus on return on investment the tension between brand building and product support intensified[541]. Advertising agency relationships changed as telcos looked for superior planning, creative and media services with Vodafone and O_2 moving their accounts abroad. Internal brand building capabilities were valued but there was a shift towards external activities[542].

	2007	2008	2009	2010	2011	2012
Mobile Revenue (€bn)	2.05	2.06	1.81	1.69	1.64	1.55
ARPU (€)	44	41	37	34	30	29
Post pay subscriptions (%)	26	30	33	36	37	40
Market Share (Subscribers) (%)						
Vodafone	45	42	40	41	41	40
O_2	33	33	34	33	30	28
Meteor	19	19	21	20	18	18
3	4	6	6	7	8	9
Tesco Mobile	-	-	-	-	2	3
All Other	<1	<1	<1	<1	1	2

Table 5-20 Mobile Market Structure (2007-2012) (Shares Includes Mobile broadband)[543]

Commercial opportunity drove MNOs to sign MVNO agreements seeing it as a new source of revenue and channel of distribution. They enabled network capacity to be sold in long-term wholesale contracts with no responsibility for distribution or customer care[544]. Although the equity of MNO brands had weaknesses they were trusted. Some MVNOs were anxious to leverage this although MNO marketers worried it would undermine their brands[545]. Between 2007 and 2012 seven MVNOs[546] were launched (see Table 5-21) without substantially impacting incumbents' revenues[547]. MVNOs had to overcome the community structure of pre-pay pricing plans and discounted triple play prices in enterprise[548]. They needed to invest in marcoms, secure and subsidize handsets and maintain a distribution channel. MVNOs discovered that displaying a range of handsets was costly and selling capabilities were required[549].

Brand	Operated	Owner	MNO
Tesco Mobile	2007 -	Tesco Mobile Ireland	O_2
Postfone	2010 -	An Post	Vodafone
eMobile[550]	2010 -	Eircom	Meteor
Just Mobile	2010 - 2011	Just Mobile	Vodafone
48 Months	2012 -	Telefónica	O_2
Blueface	2012 -	Blueface	3
Lycamobile	2012 -	Lyca Mobile	O_2

Table 5-21 MVNO Brands 2007 - 2012[551]

5.7.2 Smartphones - Changing Power in Channel

The iPod and iPod Touch revolutionized music consumption and the Apple phone was expected, but its elegance, functionality and business model surprised the telcos. Apple's flair for design was evident including its integration with iTunes. Their business model offered market exclusivity to the MNO who promised Apple the best revenue share and the potential to build the iPhone brand turning the traditional model on its head. O_2 won the iPhone in the UK and in March 2008 O_2 Ireland launched iPhone[552] with two years exclusivity. iPhone drove O_2's success between 2008 and 2010; exclusivity and association with the Apple brand helping them become post pay market leader. But innovation was driven by Apple making O_2 vulnerable when exclusivity expired[553]. Vodafone were forced to source smartphones from other suppliers but customers wanted iPhone. Vodafone announced iPhone six months before its launch in March 2010 and encouraged customers to register their interest[554-555]. Meteor, Three and eMobile had secured iPhone by mid-2011 removing its potential as a differentiator and contractually binding each to build the iPhone brand. Such was the trust in the Apple brand that call quality issues were attributed to the MNO rather than the handset despite the reverse often being true and increases in mobile phone costs fueled by data usage were attributed to the MNO to whom the bill was paid[556].

Samsung and other firms with strengths in technology entered the market underpinning a battle between operating systems. Google was defining customer's interaction with the Internet and Android phones were outselling Apple by 2012[557]. Vodafone launched own brand handsets to meet demand for affordable smartphones with some success[558]. Nokia and Blackberry failed to respond effectively to the challenge. Nokia's share fell from 80% to 20% due to a lack of understanding of IT, the lack of an integrated system such as iTunes and a complicated user interface[559]. Their smartphones failed to impress and brand equity plummeted, a fate that also befell Blackberry[560]. Smartphones shifted the balance of power to the handset brands especially Apple[561]. Whilst some customers did not trust the quality of the Meteor or Three networks[562] for most the availability of their chosen handset dictated network choice[563].

5.7.3 Firms in the Industry 2007-2012

Eircom

Eircom was critical to delivering broadband infrastructure, under scrutiny from the Regulator and vulnerable to competition, had industrial relations problems and financial debt. Babcock & Brown was renamed Eircom Holdings Ltd and Paul Donovan was recruited as Eircom CEO in 2009. Meteor was an *"independent republic"* within the group[564] and a late entrant to data[565] focusing their brand on value and social connectivity. Mobile was strategically imperative to Eircom but although Meteor provided infrastructure its brand lacked credibility with high value consumers and in enterprise[566]. Competitors challenged an attempt to market Eircom Talk Time bundles incorporating line rental, broadband and free calls to Meteor and ComReg ruled it inconsistent with Eircom's regulatory obligations[567].

Singapore Technologies Telemedia bought 65% of Eircom in January 2010 the balance remaining with ESOP[568]. Eircom redefined itself as a *"communications and entertainment services company"*[569] and Donovan restructured it into *"one company, two brands"*[570] redefining Meteor as an external facing brand[571]. The retail operations of Eircom and Meteor were integrated into a Consumer and Small Business (CSB) division[572] which became the locus of brand management. Although there was a clash of cultures between Eircom and Meteor[573] CSB evolved into a cohesive, hungrier division[574]. NGB was launched in March 2010 and within a year had attracted 300,000 customers[575]. Eircom reformed their wholesale business[576] in 2011 changing governance processes and formalizing the separation of retail and wholesale[577].

Donovan developed a dual brand strategy in mobile, retaining Meteor and introducing eMobile for postpay, adults and enterprise. It was set up as an MVNO on Meteor enabling Eircom to circumvent regulatory restrictions and sell bundled services to fixed line customers. The strategy was to exploit trust in the Eircom brand creating an identity that tailored Eircom for mobile thereby enabling them to engage with corporates and government[578]. It demonstrated commitment in mobile to smartphone suppliers[579] resulting in Eircom securing iPhone, Blackberry and other brands for eMobile and Meteor. Yet enterprise buyers remained wary of its infrastructure and the brand struggled to gain credibility with them[580]. Eircom was the largest advertiser in the industry and remained committed to their community roots through CSR and sponsorship which also engaged employees with the brand[581]. Believing values to be critical in times of change Donovan initiated a programme to modernize them.

Despite this activity Eircom's share continued to erode. Burdened with accumulated debt Eircom was on the brink of insolvency[582]. It went into examinership in April 2012 exiting in June with a simplified capital structure and a new holding company Eircom Holdings (Ireland) owned by the Group's lenders. ESOP was not a shareholder. Donovan announced his intention to leave and was

replaced by Herb Hribar in October 2012. In December 2012 Eircom announced that eMobile would become a bundled offering rather than a standalone brand[583].

Vodafone

Charles Butterworth replaced Elder as CEO of Vodafone and in November 2007 Vodafone acquired Perlico for €80 million[584] to accelerate their entry into fixed line[585]. Vodafone had been mandated to buy a suitable provider in response to shareholder pressure at a group level[586] and *"Perlico fitted the bill"*[587]. No value was placed on the Perlico brand and its fit with Vodafone was poor[588]. Vodafone evolved rapidly into a *"total communications company"*[589] through acquisition and innovation. Perlico delivered a base of 62,500 customers[590] and its brand was phased out[591]. The cultural fit was poor resulting in many Perlico personnel leaving[592]. A home Internet and telephony service branded Vodafone at Home was launched in 2008 and sold through retail channels[593]. In 2009 Vodafone formed a strategic partnership with BT Ireland through which BT's consumer and SME base was transferred to Vodafone who gained access to BT's advanced infrastructure enabling them to offer a differentiated suite of products[594] and reduce their dependence on Eircom[595].

Vittorio Colao became global CEO and the brand essence changed[596]. An early manifestation of this positioning, Vodafone 360, attempted to compete with Apple and Google and tie customers to the brand. But it was unsuccessful. Vodafone Broadband in a Box a hybrid fixed and mobile broadband access proposition launched in 2010[597] was indicative of a move from content towards connectivity. In 2011 Vodafone acquired Interfusion Networks a managed services company but despite its strong reputation the brand was discontinued and operations integrated into Vodafone's[598]. In 2012 Complete Telecom, a managed data network and fixed telecom provider, was acquired cementing Vodafone's strategic positioning as a leader in total telecoms solutions[599].

Vodafone invested in marcoms across a wide range of products and pressure on costs generated more effective campaign management. They sponsored a variety of properties but failed to secure a high profile national sponsorship project. Vodafone's sustained commitment to CSR was recognised by an Outstanding Achievement Award in 2010[600] its role as much about employee engagement as external brand building[601]. Changes in the trading environment eroded profitability, falling by €30 million in 2010[602]. Customer service costs were high and when Jeroen Hoencamp became CEO in 2010 an outsourcing programme was instigated as customer service was no longer perceived as differentiating[603]. Delivering a differentiated customer experience remained a priority and was central to a restructure in 2011[604]. An internalization programme was undertaken to embed the essence but it was superseded by The Vodafone Way in 2010 and this shifting brand story caused confusion and cynicism amongst employees[605]. Vodafone retained strong brand

building capabilities and an integrated approach to communications, but the culture and a lack of continuity in brand values[606] made it *"difficult to describe it as a brand centric company"*[607].

Telefónica O_2

At a strategic level Telefónica played a role in O_2 but the customer and internal brand remained O_2[608]. They entered fixed in 2008 using wholesaled lines but remained resolutely an *"untethered brand"*[609] embracing WiFi and smartphone technology to enhance its connectivity positioning[610]. The iPhone revolutionized O_2 but the business was negatively impacted when exclusivity ended. Danuta Gray employed experienced marketers to build the brand but a series of changes in CEO and marketing director plus challenges post iPhone exclusivity undermined the centrality of marketing[611]. Gray stepped down in 2010 and was replaced by Stephen Shurrock[612] who was succeeded by Tony Hanway in 2012[613].

O_2's conviction in the business building potential of sponsorship resulted in long term contracts with the IRFU[614] and Dublin's Point Depot (rebranded The O_2) locking up significant proportions of marketing budgets[615]. There was tacit understanding that approximately 23% media SOV was required to sustain performance[616] and when spending cuts were demanded there was limited opportunity to divert spend from sponsorship. The resulting reduction in proposition support and SOV impacted brand tracking metrics and a corresponding fall in business performance[617]. In 2011 O_2 launched a prepay money card operating on the Visa platform and had over 100,000 customers within a year[618]. O_2 Money was a precursor to expected convergence between the wallet and mobile that would form part of a 4G offering[619].

UPC

UPC started merging the management and operations of Chorus and NTL investing €1bn in network upgrades[620]. The brands were run in parallel until media expenditure was merged to create efficiencies communicated as 'Chorus / NTL a UPC Company'. Contemporaneously UPC invested in developing a triple play proposition changing employees' mindsets and creating a consistent brand experience[621]. The UPC brand was launched in May 2010 in concert with the announcement of 100Mb broadband for domestic customers, a speed competitors could not match[622]. The rebrand was heavily supported but it was only when customers' experienced the service that brand metrics changed. UPC used this learning to launch showcase products which demonstrated that UPC was delivering *"new experiences that other brands could not"*[623]. As part of the rebrand process the global vision, values and brand positioning were adopted and internalized through an extensive programme but there were some disconnects with local values and Dana Strong who became CEO in 2010 initialized localization.

Broadband speed helped UPC revolutionize the market and by 2012 they were market leader[624]. The brand changed how people viewed telcos, challenged entrenched loyalties and built trust in a way other broadband companies failed to do[625]. UPC saw telephony as a commodity included as part of the bundle, disrupting the market, driving down the price of fixed line calls[626] while growing their telephony base from 13,900 in 2008[627] to 187,000 by July 2012[628]. For strategic reasons UPC did not wholesale and were not required to do so by the Regulator[629]. Thus the movement of customers from brands within the Eircom wholesale community resulted in the loss of direct sales and wholesale revenues.

Three

Three maintained its disruptive approach with aggressive pricing on data[630]. In 2008 3Pay Broadband became Ireland's first pre-pay mobile broadband proposition and they later became the only MNO offering *"all you can eat"* data tariffs[631]. In 2010 Three became primary sponsor of the Football Association of Ireland, CEO Robert Finnegan building the business case to support this investment believing it would drive sales[632]. The advent of smartphones suited Three's data rich strategy with offers such as free iPhones and unlimited data. Despite this they struggled to build share[633]. When Babcock and Brown were interested in selling Meteor Finnegan explored the opportunity but concluded that the network and the customer base were not attractive[634]. In 2012 Hutchinson Whampoa made a late bid for Eircom which was rejected by the examiner but was viewed by commentators as a statement of intent and reflective of Three's ambition in the market[635-636]. Overall brand was not a key priority of senior management.

Other OAOs[637]

Smart was well-known in enterprise and consumer markets and the leading independent payphone brand. Triple-play provider ENVI was purchased in 2007[638] and used as the base for Smart Vision, a TV service launched in 2008[639]. Smart invested in infrastructure and marketing high speed data services. The company entered examinership in 2009 and was rescued by Digiweb who were pursuing an acquisition strategy. In 2008 Novara was acquired[640] making Digiweb Ireland's largest Irish owned web hosting company, but it was the acquisition of Smart that transformed Digiweb into a real challenger in the industry[641]. The Smart brand was retained to build on its market position[642]. Internet Ireland a web hosting and telecoms solutions provider was acquired in 2010[643] and Talk Talk Ireland later that year[644]. Overall the thrust of the Digiweb corporate brand was in IT, webhosting and broadband

Imagine led in the deployment of WiMax[645] technology initially with investment by Intel and Motorola. Cinergi Telecom was acquired in 2007[646] and Irish Broadband in 2008 giving Imagine scale and complementing their deployment of WiMax[647]. In 2010 they acquired the Irish assets of Clearwire including the customer base and spectrum holdings[648]. Imagine was the number two

enterprise telecoms company by 2010[649] with a growing presence in consumer. However, despite supporting WiMax through marcoms the brand lacked equity for consumers who questioned its reliability and were reticent to switch[650].

BT Ireland became associated with business and quality engineering[651]. Following its strategic partnership with Vodafone it focused on becoming the leader in networked IT services for medium to large businesses and the public sector operating on an all island basis. Other B2B global brands such as Verizon and Cable & Wireless (acquired by Vodafone globally in 2012[652]) operated but had low market shares and little brand building activity. Blueface started as a VoIP specialist in 2005, becoming primarily an enterprise brand. They formed a strategic alliance with Panasonic to distribute Panasonic branded phone systems[653] and concluded a deal with satellite broadband company OnWave to provide own brand telephony products[654]. In 2012 they launched an MVNO and appointed CPW to sell fixed and mobile products for them[655]. Magnet Entertainment, the residential division of Magnet Business, developed and marketed a triple play service, launching a broadcast TV station which became Magnet WebTV[656]. Accessible through smartphones and tablets in addition to computers it was rebranded AerTV[657] although the Magnet brand was retained through the motif *"powered by Magnet"*.

5.7.4 Mobile Virtual Network Operator (MVNO) Brands

Tesco Mobile

Tesco had experience of MVNO in the UK. Tesco Mobile Ireland a joint venture owned by Tesco and O_2 launched a pre-pay service in October 2007[658]. The Tesco brand is associated with value[659] and Tesco stores facilitated handset display[660]. For O_2 the joint venture enabled them to retain some control and access to market data unavailable in a pure MVNO contract[661]. The use of *"Powered by O_2"* conferred network credentials onto the brand[662]. They had a simple tariff structure and invested in media. Entering the market at the optimum time for a MVNO[663] should have ensured success, but they were slow to build share. They expanded into post-pay and data, added smartphones to their handset range and continued some investment in marcoms[664].

Postfone

In 2007 An Post researched ways to exploit their post office retail channel and established customers would be willing to use them for adjacent services. Fixed line phones were seen as appropriate due to residual memories of the P&T yet they chose to launch an MVNO on Vodafone's network[665]. The MVNO promised to *"draw on the strengths of two of the most recognized brands in Ireland"* to deliver customer value[666]. Technical difficulties in Vodafone delayed the launch until June 2010. The initial proposition was voice and text with five handsets and a SIM only offer. Postfone targeted the 1.7 million customers who visited post offices weekly[667]. The term *"Powered by Vodafone"* was used in communications but as the market

moved to smartphones Postfone found it hard to compete and customers were unprepared to purchase without the help of knowledgeable staff. Postfone had limited success; share failed to register in ComReg reports but was estimated below 1% by competitors.

Just Mobile

Just Mobile was a MVNO founded by entrepreneurs who saw an opportunity to create a brand incorporating a CSR dimension and distributed through convenience stores. Sean Melly became chairman and Powerscourt Capital investors[668]. They partnered with BWG giving them access to SPAR, EUROSpar, Mace and XL and elicited the support of Stephen Brewer for investment and to negotiate with Vodafone[669]. BWG sold mobile credit and saw handsets as high value products they could incentivize retailers to sell[670]. Just Mobile launched in October 2010 supported by advertising[671] and a social media strategy. They had unique handsets, an acceptable tariff structure and a distinct brand positioning[672]. In August 2011 ComReg told Just Mobile to cease operation[673]. Its failure was attributed to many factors including undercapitalization[674], lack of investment in brand building but mostly the failure of a distribution channel which lacked sales expertise[675].

Other MVNOs

Other targeted MVNOs appeared in the market in 2012. Telefónica was experimenting with niche brands across Europe and Ireland was chosen to test a brand concept available to people aged 18-22, a cohort not core to O_2's business plan. The 48 MVNO was launched on the O_2 network in 2012 as a SIM-only brand offering a compelling value proposition supported by significant marcoms activity[676]. The business model for 48 was unique using on-line as its only distribution and care channel and encouraging community interaction to solve customer experience issues. Blueface built on its fixed line presence to launch an enterprise MVNO on Three's network and Lycamobile entered as an MVNO on O_2 targeting the ethnic market. These brands had little impact on the industry by late 2012[677].

5.8 SUMMARY

In the early 1980s the telecoms industry was an unbranded monopoly dominated by fixed line telephony. The emergence of indigenous brands in the industry was triggered by changes in the regulatory environment and the subsequent exploitation of brands helped transform telecoms into a highly competitive industry encompassing multiple communications technologies. Waves of innovation and deregulation stimulated the formation and reformation of strategic groups and industry boundaries. This was accompanied by intense intra-industry competition facilitated by brands managed in increasingly brand orientated firms. Despite maintaining high levels of marcoms the primacy of the network operators' brands has been superseded by handset brands in the minds of consumers enabling them to shift the balance of power in the value chain and gain an architectural advantage.

ENDNOTES CHAPTER 5

[1] Flynn, R., & Preston, P. (1999). The Long-Run Diffusion and Techno-Economic Performance of National Telephone Networks: A Case Study of Ireland, 1922–1998. Telecommunications Policy, 23(5), 437-457. Fransman, M. (2003). Evolution of the Telecommunications Industry. The International Handbook of Telecommunications Economics, 3, 15-38. Heilmeier, G. H. (1998). Pots and Pans: Telecommunications in Transition The Bridge, 28(1). Preston, P. (2002). Telecoms and Ireland's Economic Miracle 1990-2001. In P. Preston, M. S. Helmus, L. Van Audenhove & P. Verhoest (Eds.), Case Study Collection

[2] Voice Over Internet Protocol

[3] A device that makes phone calls and acts as a handheld computer and web browser

[4] Personal interviews with Paul Donovan, Enda Lynch, Eavann Murphy, Rosemary Steen and Martin Wells

[5] This term, originally used in the context of mobile handsets, is used here to encompass handset and their mobile operating system which may be accessed over WiFi or 3G

[6] A *'dumb pipe'* merely provides connection to services and content that customers obtained from other providers. This risk was identified in interviews with Mark Coan, Paul Donovan, Dorothy Kelly, Enda Lynch, Sean Melly, Sinead Spillane and Martin Wells

[7] Eurostat. (2012b). Telecommunications Services Statistics - Nace Rev. 2

[8] ComReg. (2013c). Quarterly Report Q4 2012. Reference Number: 13/25

[9] Personal interviews with Paul Donovan, Gerry Fahy, Dorothy Kelly and Anthony O'Neill

[10] Mobile shares are based on subscriptions all others on revenue share. ComReg (2012a) Quarterly Report Q3 2012.

[11] ComReg Quarterly Reports (2004-2012)

[12] CSO (2013)

[13] ComReg (2012a)

[14] Personal interviews with Mark Coan, Paul Donovan and Rosemary Steen

[15] In a corporate brand architecture (also known as a branded house) product names are secondary to the company name.

[16] Personal interviews with Paul Donovan, Miriam Hughes, Eavann Murphy, Anthony O'Neill, Sinead Spillane and Martin Wells

[17] Personal interviews with Mark Coan, Paul Donovan, Enda Lynch, Rosemary Steen and Martin Wells

[18] Personal interviews with Paul Donovan, Enda Lynch, Eavann Murphy and Rosemary Steen

[19] These capabilities are evidenced by Eircom, Meteor and Vodafone winning at the 2011 Social Media Awards. Social Media Awards (2011) Winners Case Studies

[20] Media Expenditure recorded by Nielsen and run by Carat in October 2012. Perlico was the only significant advertiser in the others category, but support ceased in 2009

[21] Carat (2012)

[22] In 2012 the global Vodafone brand was valued at $30bn and O_2 at $6.7bn. Brandirectory (2013). The Most Valuable Telecom Brands of 2012

[23] Personal interviews with Mark Coan, Paul Donovan, Dorothy Kelly, Anthony O'Neill and Martin Wells

[24] Fransman (2003:6)

[25] Personal interview with Alfie Kane

[26] Litton, A. J. (1961). The Growth and Development of the Irish Telephone System. Journal of the Statistical and Social Inquiry Society of Ireland, XX, Part V, 79-115

[27] Mackey, L. (1999). We've Come a Long Way! Century of Telecoms (Dec1999 - Jan 2000). Eircom Live

[28] The first official publication of the new state was the Telephone Directory

[29] Preston (2002)

[30] An Bord Telecom. (1992). Annual Report and Accounts for Year Ending 2nd April 1992.

[31] Litton (1961)

[32] Ibid. p 88-89

[33] Ibid. p79-115

[34] Telephone density is the number of telephones as a percentage of the population

[35] In 1960 national telephone density was 5.13%, highest in Dublin (9.25%), lowest in Roscommon (1.0%). Litton (1961)

[36] Personal interview with Alfie Kane

[37] An Bord Telecom. (1985). First Report and Accounts for Period Ended April 1985

[38] P-E Consulting Group (Ireland) & National Prices Commission. (1976). Department of Posts and Telegraphs. Dublin: Stationery Office

[39] An Bord Telecom (1985)

[40] Collated from: Litton (1961). P-E Consulting (1976)

[41] Report was commissioned by the National Prices Commission.

[42] Ibid. p.18

[43] Quoted in Cingan, W. (1979, 3rd July). Two New Bodies to Operate Post and Telephone Services. The Irish Times, p. 1
[44] Dargan, M. J., &. Dept. of Posts and Telegraphs. (1979). Report of Posts and Telegraphs Review Group : 1978-1979. Dublin: Stationery Office
[45] Dáil Éireann. (1981). Reorganisation of Postal and Telecommunications Services. Dublin: Stationery Office. p. 20
[46] Cingan (1979)
[47] The Irish Times. (1980, 25th November). Bord Telecom 'Still Learning,' Says Chairman. p. 6
[48] Dáil Éireann. (1981)
[49] This was challenged by the Restrictive Practices Commission in 1983 who observed that it was regrettable that the opportunity to establish competition in CPE was not introduced at this time. Competition for Telecom Desirable. (1984, 10th November). The Irish Times, p. 20
[50] Dáil Éireann (1981)
[51] Ibid. p. 15
[52] Ibid
[53] Wren, M.-A. (1983, 13th April). Lines Too Busy for Public Relations. The Irish Times, p. 10
[54] McDonald, F. (1983, 2nd May). Smurfit Says Board Acted in Good Faith. The Irish Times, p. 7
[55] Ibid
[56] Telecommunication Workers' Union & Telecom Eireann. (1995). The Future of the Telecommunications Industry in Ireland : A Submission on Behalf of the Staff of Telecom Éireann. Dublin: Telecommunication Workers' Union
[57] Personal interviews with: Gerry Fahy, Celine Fitzgerald and Alfie Kane
[58] In 1984 there were 14 marketing employees out of nearly 18,000 employees. Garavan, T. N. (1996). Cases in Irish Business Strategy and Policy. Dublin: Oak Tree Press
[59] Gerry Fahy joined the P&T in 1976 and was sent to university by them to train as an engineer, starting work in the Department in 1980
[60] Celine Fitzgerald joined the civil service in 1984 and was given the choice of working in either the postal or telecoms organizations
[61] Personal interview with Alfie Kane
[62] Personal interview with Celine Fitzgerald
[63] Personal interview with Jim Dunne
[64] Personal interviews with Celine Fitzgerald and Alfie Kane
[65] Personal interview with Jim Dunne
[66] Dunne was a designer with Kilkenny Design at that time. He established the Identity Business with Peter Kruseman in 1991 and both became significant actors in brand development and consultancy in the telecoms industry working on brands such as Eircell, Let's Talk Phones, Eircom, Vodafone and Fonūa. The Identity Business was purchased by WPP in 2001 and renamed Enterprise IG
[67] Personal interviews with Jim Dunne and Gerry Fahy
[68] Personal interviews with Gerry Fahy, Celine Fitzgerald and Alfie Kane
[69] Preston (2002)
[70] Personal interviews with Gerry Fahy, Alfie Kane and Sean Melly. Kane observed that while deregulation allowed for competition, for competition to be viable it was essential to have effective regulation
[71] Heilmeier (1998)
[72] O'Connell, S. (1998, 16th December). Competition Has Led to Improvement in Services. The Irish Times, p. A9
[73] Personal interviews with Celine Fitzgerald and Alfie Kane
[74] Personal interview with Sean Melly
[75] O'Kelly, B. (2001). *The Esat Story*. Dublin: Gill & Macmillan.
[76] Carey, B. (1996, September). Young Man in a Hurry Makes the Right Connections to Merger Billions. The Sunday Business Post
[77] Personal interview with Sean Melly
[78] Ibid
[79] Davy Equity Research. (1999a). Esat Telecom Group. A Major Force in Data and Internet. Dublin: Davy Stockbrokers
[80] The terms 'domestic' and 'residential' customers are used during this period, but with the advent of mobile the term 'consumer' starts to appear. Consumer will be used to indicate non-business customers from this point onwards
[81] Kennedy, J. (2012, 15th May). 20 Years of the Internet in Ireland (Timeline). Siliconrepublic.com
[82] The last manual exchange closed in Clifden, Co Galway. An Bord Telecom Annual Report 1988.
[83] Personal interviews with Gerry Fahy, Alfie Kane and Sean Melly
[84] Personal interview with Alfie Kane

[85] O'Kelly (2001)
[86] Garavan, (1996)
[87] An Bord Telecom (1985). Davy Equity Research. (1999e). Telecom Eireann Group Profile. February 1999. Dublin: Davy Stockbrokers
[88] Garavan,(1996)
[89] Compiled from An Bord Telecom Reports and Accounts 1985-1992; Garavan (1996); Massey, P., & O'Hare, P. (1996). Competition and Regulatory Reform in Public Utility Industries: Issues and Prospects. Journal of the Statistical and Social Inquiry Society of Ireland, XXVII(00814476), 71. * Figures for mobile phones are for April.
[90] An Bord Telecom. Annual Report and Accounts for Year Ending 3rd April 1986
[91] Global System for Mobile communications
[92] RTE Relays was formed in 1970 and merged with Dublin Cable Systems (a merger of Merlin Cable and Phoenix Relays) in 1984. In 1986 Cablelink was formed from the merger of this with Galway Cablevision and Waterford Cablevision. Wikipedia. (2012). NTL Ireland
[93] An Bord Telecom. Annual Report and Accounts for Year Ending 30th March 1990
[94] Xchange: The Paper for Telecom Eireann Staff. (September 1995)
[95] O'Kelly (2001)
[96] Preston (2002)
[97] EU Telecommunications Directorate - Services Directive. CD 90/388
[98] EC Leased Line Directive 92/44/EEC
[99] O'Kelly (2001)
[100] Preston (2002)
[101] The practice of renting handsets continued until November 2000. Personal interview with Alfie Kane
[102] Personal interview with Alfie Kane
[103] In 1994 61% of employees were described as "technical" from 57% in 1984, despite an overall fall of 21% in technical staff. Telecommunication Workers' Union (1995)
[104] Garavan (1996)
[105] An Bord Telecom (1985) p 7
[106] An Bord Telecom (1990) p.53
[107] Telecommunication Workers' Union & Telecom Éireann (1995)
[108] McGovern, F. (1985, 24th September). Telecom's New Man Faces a Daunting Task Bravely. The Irish Times, p. 15
[109] Advertising agency CDP created an award winning multimedia campaign called Changing Shapes that was rooted in Irish imagery and ran for almost a decade. It encompassed corporate, seasonal and promotional executions to stimulate usage and support the brand. Personal recollections, Helen Marks
[110] Golden Pages was established in 1969. In 1984 Telecom Éireann bought a 49% share in the company. Golden Pages was an important vehicle for B2B customers to communicate with customers and also help stimulate telephone traffic
[111] In effect this went to nearly all households in the country
[112] Personal interview with contemporaneous senior executive
[113] Telecom Éireann (45%), other shareholders Trinity College Dublin and Ericsson
[114] Joint venture with Motorola (Telecom Éireann 61%). Both brands feature on marketing material
[115] This is an estimated date. By March 1991 there were 14 Telecentres in operation.
[116] Joint venture with France Telecom, AIB and Credit Lyonnaise
[117] Joint venture with NYEX Corporation
[118] An Bord Telecom (1990)
[119] 50:50 joint venture with Postgem subsidiary of An Post
[120] Joint venture with Motorola
[121] Compiled from An Bord Telecom Annual Report and Accounts (1985-1992). Garavan (1996). Xchange: The Paper for Telecom Eireann Staff, Feb and March 1995
[122] Personal interviews with Jim Dunne and Alfie Kane
[123] Personal interviews with Gerry Fahy and Alfie Kane. Fahy studied for an MBA in the late 1980s early 1990s funded by Telecom Éireann
[124] Personal interview with Jim Dunne and Alfie Kane
[125] Jim Dunne describes the launch of ISDN (introduced in 1989) to illustrate this point. Helen Marks recalls leading an advertising pitch in 1990 to promote ISDN and leased line products to local and international business customers as part of a Saatchi & Saatchi global team and experienced this brand proliferation
[126] Personal interviews with Jim Dunne and Alfie Kane
[127] Personal interviews with Gerry Fahy and Alfie Kane
[128] An Bord Telecom (1985) p. 11
[129] Personal interview with Sean Melly

[130] This was a result of the purchase of the old Johnson, Mooney and O'Brien bakery in 1990
[131] Personal Interview with Celine Fitzgerald
[132] An Bord Telecom (1985)
[133] Celine Fitzgerald reports this from her perspective as an HR manager in the organization at the time
[134] An Bord Telecom (1990)
[135] Gerry O'Sullivan was Head of Corporate Communications and is identified by Alfie Kane and Jim Dunne as instrumental in raising awareness of the importance of brand within Telecom Éireann
[136] Personal interviews with Jim Dunne and Alfie Kane
[137] Personal interview with Alfie Kane
[138] Network prefixes became a key term used by customers to define their mobile network. Whilst not a brand 088 was later used to by customers to describe what network they were on and to differentiate themselves from Eircell GSM (087), Esat Digifone (086) or Meteor (085) customers
[139] O'Hora, A. (2005, 15th October). A Mobile Is Lost or Stolen Every Four Minutes. Irish Independent
[140] Xchange: The Paper for Telecom Eireann Staff. (March 1995)
[141] Business 2000 (1998 - 1999). Managing for Growth and Change at Eircell. 1st Edition Case Studies
[142] Subscriber Identity Module
[143] Personal interviews with Alfie Kane and Don Maher
[144] David McCarthy recalls that in focus groups some customers thought that they were on the Nokia network, such was the strength of the brand
[145] Personal interviews with Gerry Fahy and David McCarthy
[146] Davy Equity Research. (1999e)
[147] Personal interview with Sean Melly
[148] Compiled from Garavan (1996); Office of the Director of Telecommunications Regulation (1999) Liberalisation in the Irish Telecommunications Market - One Year On. Smyth, J. (2003). Sigma Guru Relishes Retail Battle Irish Times, p. 46; The Irish Times. (1999, 10th September) Telecom Companies at a Glance. p. B2
[149] The channel was not a success. Creaton, S. (2010). A Mobile Fortune: The Life and Times of Denis O'Brien. London: Aurum
[150] Creaton (2010)
[151] This is reported by interviewees who have worked with him, competitors and in the media
[152] O'Kelly (2001)
[153] Creaton (2010)
[154] Ibid. p. 56
[155] O'Kelly (2001)
[156] Ibid
[157] Ibid
[158] Creaton (2010)
[159] Personal interview with Sean Melly
[160] Davy Equity Research. (1997). Esat Telecom: Company Profile. Dublin: Davy Stockbrokers
[161] The Esat Digifone Story (2003)
[162] Autodiallers were small boxes that were attached to the customer's telephone creating a virtual leased line
[163] O'Kelly (2001)
[164] Carey (1996)
[165] Personal interview with Sean Melly
[166] Ibid
[167] The term data is used here to describe a variety of non-voice applications of the telecoms infrastructure. It includes Internet, media content, email, electronic document interchange, corporate networks, mobile communications, video services, file transfer, database access, virtual private network (VPN). It was delivered on new technologies such as optical fibre networks, satellite, TV cable systems and via PSTN using advanced technologies called ISDN, HDSL, ADS
[168] Department of Environment and Local Government. (2000). Report on Information Technology Infrastructure
[169] The term brand and discussion of branding become more frequent in the archival data reviewed and many interviewees identify this as the period when brand became a strategic issue within organizations
[170] Personal interview with Alfie Kane
[171] Esat Telecom and Esat Digifone were two separate companies. Throughout the interviews the names Esat, Esat Digifone and Digifone were used. This reflects the diverse usage by customers during this era. Personal recollection by Helen Marks
[172] O'Kelly (2001)
[173] Massey & O'Hare (1996)

[174] Office of the Director of Telecommunications Regulation. (2000). Speech by Etain Doyle, Director of Telecommunications Regulation to the Institute of Management Consultants in Ireland and the MBA Association, 17th January, 2000
[175] Massey & O'Hare (1996)
[176] The main effect of this was to liberalise voice telephony in the EU by January 1998. Ireland was given derogation on voice and PSTN until June 2000. Davy Equity Research (1997)
[177] Office of the Director of Telecommunications Regulation (2000)
[178] They were obliged to determine the presence of Significant Market Power (SMP) as mandated by the EU
[179] Telecom Éireann was deemed to have SMP in the fixed, interconnect and leased line markets and Eircell in the mobile market with no SMP in mobile interconnect in October 1998 prior to the liberalisation of the fixed line market. Office of the Director of Telecommunications Regulation. (1998). Significant Market Power in the Irish Telecommunications Sector. Decision Notice: D4/98. October 1998
[180] Ibid
[181] Davy Equity Research. (1999e)
[182] Ibid
[183] Compiled from: Davy Equity Research. (1999e); Massey & O'Hare (1996); Office of the Director of Telecommunications Regulation. (2000); Mintel. (2000b). Telecommunications in Ireland. London: Mintel International Group
[184] Mintel (2000b)
[185] Personal interview with Gerry Fahy
[186] Personal interviews Gerry Fahy and Alfie Kane
[187] Mintel (2000b)
[188] Preston (2002)
[189] Davy Equity Research. (1998). Esat Telecom. A New World Awaits. Dublin: Davy Stockbrokers.
[190] O'Connell (1998)
[191] Mulqueen, E. (1998, 24th June). ITG Gears up for Challenge on Telecom. The Irish Times, p. A2
[192] Davy Equity Research. (1998)
[193] Office of the Director of Telecommunications Regulation (2000)
[194] The mobile base in March 1995 was 88,000 and the target was 250,000 by 2000.
[195] Personal interviews with Stephen Brewer and Don Maher
[196] Ingle, R. (1997, 24th November). Walkie Talkie. The Irish Times, p. 17
[197] Mintel. (2000b)
[198] Office of the Director of Telecommunications Regulation (2000). Irish Independent (1998, 8th April). Xtravision Chain to Get a £10m Facelift
[199] Personal interview with Don Maher
[200] Ibid
[201] Personal interviews with Stephen Brewer, Tara Delaney, Gerry Fahy, Celine Fitzgerald, Alfie Kane and Eavann Murphy
[202] Personal interviews with Stephen Brewer, Tara Delaney, Celine Fitzgerald and Eavann Murphy
[203] Compiled from Davy Equity Research. (1999e) and Mintel (2000b)
[204] Office of the Director of Telecommunications Regulation (2000)
[205] Personal interview with Tara Delaney. Delaney joined the ODTR in 1998 with responsibility for communications and PR
[206] Class 1 were Basic licenses and Class 2 were General Licenses for companies requiring a number allocation including public voice telephony services. Office of the Director of Telecommunications Regulation (2000)
[207] Davy Equity Research. (1999c). Esat Telecom. (Inter) Connected. Dublin: Davy Stockbrokers
[208] Alord Holdings, Casey Cablevision, Hibernet, Iridium Communications Germany, Next Telecom, Reuters Connect Services, Telecommunications and Computer Services Ltd and Torc Telecom
[209] Office of the Director of Telecommunications Regulation (1999)
[210] Mintel (2000b). Irish Marketing Surveys Ltd Office of the Director of Telecommunications Regulation. (2001). Telecommunications Survey : Residential Market : Report. Dublin
[211] The Irish Times. (1997). WorldCom Buys MCI in Biggest Takeover to Date. p.16
[212] O'Kelly (2001)
[213] O'Keeffe, B. (2000). Merger Mania Forecast for Europe's Telecoms. The Irish Times, p. A4
[214] Outspending financial services traditionally the industry with the highest advertising expenditure
[215] Personal interviews with Stephen Brewer, Paul Donovan, Gerry Fahy and Alfie Kane
[216] Personal interviews with Stephen Brewer, Gerry Fahy, Celine Fitzgerald and Alfie Kane
[217] Irish Marketing Surveys Ltd (2001)
[218] Office of the Director of Telecommunications Regulation (2000)

[219] Compiled from: Burke, S. (1999, 9th October). Getting Best Telephone Connection. The Irish Times p. B2; Mintel (2000b); Office of the Director of Telecommunications Regulation (1999)
[220] Davy Equity Research (1997)
[221] Eircom Live (1999c, November). Dublin: Eircom.
[222] Personal interview with Alfie Kane
[223] Personal interviews with Stephen Brewer, Alfie Kane and Don Maher
[224] Personal interviews with Don Maher and Eavann Murphy
[225] Personal interview with Don Maher
[226] Mintel (2000b)
[227] Personal interviews Gerry Fahy and Don Maher
[228] Personal interviews with Tara Delaney and Don Maher and personal recollection by Helen Marks from a research and planning meeting between Ogilvy & Mather and Enterprise IG in 2000
[229] Personal interviews with Gerry Fahy and Don Maher
[230] Ibid
[231] Burke (1999). Davy Equity Research. (1999c). Ward, M. E. (1999, 19th March). Hard to Get Clear Line on Mobile Phone Bills. The Irish Times, p. B3
[232] This is observed in the media coverage of the period and in personal interviews with Stephen Brewer, Miriam Hughes, Don Maher and Eavann Murphy
[233] Personal interviews with Miriam Hughes, Eavann Murphy, Anthony O'Neill and Sinead Spillane
[234] Personal interview with Don Maher
[235] Personal interviews with Don Maher and Gerry Murphy
[236] Irish Marketing Surveys Ltd (2001)
[237] Contemporary newspapers and publications from analysts such as Davy Stockbrokers and Mintel consistently show lower estimates of the potential market size in the mobile industry. This is reflected in comments from interviewees including Tara Delaney, Gerry Fahy, Celine Fitzgerald and Don Maher.
[238] Personal interviews with Stephen Brewer, Tara Delaney, Gerry Fahy, Sean Melly and Eavann Murphy. Also evident in contemporaneous media coverage
[239] Davy Equity Research. (1999e)
[240] It should be noted that prior to the establishment of the ODTR share data was *"highly dubious"* and frequently disputed Personal interview with Gerry Fahy
[241] Mintel (2000b)
[242] Personal interview with Tara Delaney
[243] Orange took legal action and the High Court upheld Orange's challenge to the ODTR who challenged that ruling in the Supreme Court and won
[244] This was found during consumer focus groups in 1998 conducted as part of an agency pitch process. Personal recollections by Helen Marks
[245] Compiled from: Mintel (2000b); Davy Equity Research. (1999e). Office of the Director of Telecommunications Regulation. (2001). The Irish Communications Market: Quarterly Review. Dublin: Office of the Director of Telecommunications Regulation
[246] Brewer was instrumental in launching the Apple brand and distribution in the UK, a business he later sold to Apple. Personal interview with Stephen Brewer
[247] Personal interviews with Paul Donovan, Gerry Fahy, Celine Fitzgerald, Alfie Kane and Don Maher
[248] Personal interviews with Edel Clancy, Tara Delaney, Gerry Fahy and Don Maher
[249]Personal interviews with Stephen Brewer, Gerry Fahy, Celine Fitzgerald, Alfie Kane and David McCarthy
[250] Personal interviews with Stephen Brewer and Gerry Fahy
[251] Personal interviews with Stephen Brewer and Celine Fitzgerald
[252] Personal Interview with Stephen Brewer
[253] Gerry Fahy estimates that it was equivalent to €20 million in current media costs. It was created by Saatchi & Saatchi Ireland under the leadership of CEO Brian Dunnion who was later recruited by Stephen Brewer as Marketing Director of Eircell
[254] Personal interviews with Stephen Brewer, Tara Delaney and Celine Fitzgerald
[255] Personal interviews with Stephen Brewer and Gerry Fahy
[256] Personal interview with Stephen Brewer
[257] Institute of Advertising Practitioners in Ireland. (1998). Eircell "Ready to Go" IAPI Advertising Effectiveness Awards (p. 27-32). Dublin: IAPI
[258] An interviewee observed: *"We couldn't spend enough money on the launch it was just incredible. We put it in for a PR award and we didn't win it because we had spent so much on advertising and then some."*
[259] This was against a projection of 40,000 handsets by the end of March 1998. Institute of Advertising Practitioners in Ireland (1998)
[260] Business 2000. (1999-2000a). Eircell - Mobile Communications Technology 3rd Edition Case Studies
[261] Wall, V. (1998, 21st November). Esat Digifone Launch Their Pre-Paid Phone Service. Irish Independent

[262] Personal interviews with Stephen Brewer and Celine Fitzgerald
[263] Personal interviews with Gerry Fahy and Celine Fitzgerald
[264] Sponsorships included support for Clare GAA, Formula 1 coverage, Eircell Press Photographers Awards, GAA AllStars, RTE's version of Who Wants to be a Millionaire, The National Ploughing Championships, horse racing and the Small Firms Association. Mintel (2000b); Business 2000 (1995-2000)
[265] Some of these were very extensive, for example a Ryanair plane and a Dart train branded Ready to Go to support the brand
[266] Personal interview with Tara Delaney
[267] Personal interviews with Tara Delaney, Gerry Fahy and Celine Fitzgerald
[268] Davy Equity Research. (1999e)
[269] Personal interviews with Celine Fitzgerald, Alfie Kane and Don Maher
[270] Business 2000. (1998 - 1999)
[271] Personal interviews with Jim Dunne, Gerry Fahy and Celine Fitzgerald
[272] Personal interviews with Paul Donovan, Gerry Fahy, Don Maher and Eavann Murphy
[273] Vodafone Group Plc. (2002). Annual Report & Accounts and Form 20-F for the Year Ended 31 March 2002.
[274] The Esat Digifone Story (2003)
[275] Creaton (2010)
[276] The Esat Digifone Story (2003)
[277] The event underlined the Norwegian contribution to the joint venture and included Viking horse drawn carriages, a forty foot juggernaut transformed into a Viking ship which contained drummers and trumpeters dressed as Vikings. Eurovision winning violinist Fionnula Sherry played the Norwegian entry, Nocturne. The full colour tender document was delivered in 12 shining aluminium containers
[278] Barry Moloney assumed total control in 1997
[279] Mr Justice Moriarty found that the Minister, Michael Lowry, had given O'Brien *"substantive information of significant value and assistance to him in securing the licence"* and that he had exercised an *"insidious and pervasive influence"*. McKittrick, D. (2011, 24th March). The Billionaire Denis O'Brien, the Minister Michael Lowry and a Deal Shocking Ireland. Irish Independent
[280] O'Kelly (2001)
[281] This included a simultaneous 3 minute promotion carried on every national TV station and every major radio station at 9.15pm. O'Kelly (2001)
[282] Personal interview with Don Maher
[283] Davy Equity Research. (1997)
[284] Wall (2001)
[285] Examples include Digifone Directory Assistance, DigiText, DigiFax, Digidata, Minute Minder, Digifone secretary (a messaging initiative for SMEs). Forfâs Ireland, & Irish Business and Employers Confederation. (1999). Telecommunications for Business : A User's Guide. Dublin: Forfâs, IBEC
[286] Eircell was the first to do an affinity deal in 1996 with the AA but Esat Digifone had a more strategic approach to this channel of distribution. Personal interview with Gerry Fahy
[287] Creaton (2010)
[288] O'Kelly (2001)
[289] The Irish Times. (2001). High Court Ruling Has Implications for Operators p. 32
[290] McManus, J. (2000). ITG Group to Pay €12.7m for 30% Shareholding in Mobile Phone Firm. The Irish Times, p. 18
[291] McCaughren, S. (2000, 24th August). Mobile Firm to Cut Bills by 40pc. Irish Independent
[292] Mintel (2000b)
[293] Smyth, J. (2000). Virtual Mobile Operators a Real Threat to Incumbents. The Irish Times, p. A10
[294] Smith, J. (2005). Entrepreneur Raises 12m to Rebuild Imagine Telecoms Brand. The Irish Times p. 16
[295] Personal interview with Don Maher
[296] Ibid
[297] For example P2P offered 10,000 chrome scooters free to purchasers of Eircell phones. Mintel (2000b)
[298] Based on Mintel (2000b)
[299] This can be observed in the press coverage of the industry
[300] O'Keeffe, B. (1999, 29th October). Esat Digifone Set to Buy O'Hagan. The Irish Times, p. A1
[301] Personal interview with Don Maher
[302] Personal interviews with Stephen Brewer and Don Maher
[303] Personal interview with Sean Melly
[304] Ibid
[305] Ibid
[306] Thesing, G. (1997). WorldCom Seek World Domination. Business & Finance, 7-8
[307] Personal interview with Sean Melly

[308] O'Keeffe, B. (1997, 10th December). BT Is Aiming for Number Two Slot among Telecoms. The Irish Times
[309] Ibid
[310] These brands included: Call Card - Hibercall; Primus; Torc Telecom. Resellers - Interoute; Swiftcall; Valuetel. Office of the Director of Telecommunications Regulation (1999)
[311] Mintel (2000b)
[312] Larkin, E. (2001, 15th January). Deregulation Has Created Wider Choice and Cheaper Costs for Telecommunications Users. The Irish Times, p. 19
[313] Personal interviews with Alfie Kane and Sean Melly
[314] Forfâs (1999)
[315] Carroll, C., & Moorehead, R. (2005). Esat-BT Managing the Complexities of Sponsorship. In C. KilBride & G. Mortimer (Eds.), Cases in Marketing Management and Strategy : Volume 4 (Vol. 2012). The Marketing Institute (Ireland)
[316] Larkin (2001)
[317] Eircom; Esat Clear; Ocean; Spirit; Switchcom; and Swiftcall. Burke (1999)
[318] A router for Esat Clear, Ocean and Spirit and pre-paid accounts for Swiftcall and Switchcom
[319] Office of the Director of Telecommunications Regulation (1999) p. 4
[320] Davy Equity Research. (1999e)
[321] Ibid
[322] Personal interviews with Jim Dunne and Gerry Fahy
[323] Personal interview with Jim Dunne
[324] Personal interview with Alfie Kane
[325] Mason Communications Ireland., Forfâs Ireland., Confederation of British Industry., Irish Business and Employers Confederation., Northern Ireland. Industrial Research & Technology Unit., & Ireland. Dept. of Public Enterprise. (2000). Telecommunications for E-Business : A User's Guide (2nd ed.). Dublin
[326] Xchange (March 1995)
[327] MacCarthaigh, S. (1997, 2nd August). Motorola to Sell Eirpage Stake to Telecom. The Irish Times, p. 15
[328] Davy Equity Research. (1999e)
[329] Eircom Live. (September, 1999). Dublin: Eircom
[330] Personal Interviews with Celine Fitzgerald and Alfie Kane
[331] Eircom Live (September 1999)
[332] Phelan, S. (2007). The Discursive Dynamics of Neo-Liberal Consensus: Irish Broadsheet Editorials and the Privatization of Eircom. Journal of Language and Politics, 6(1), 7-28
[333] Eircom Live (September 1999)
[334] Davy Equity Research. (1999d). Telecom Eireann Flotation Update. Dublin: Davy Stockbrokers
[335] Preston (2002)
[336] Davy Equity Research. (1999d)
[337] Phelan (2007)
[338] Weston, C. (1999, 6th September). Designing a New Identity for Eircom. Irish Independent
[339] Personal interview with Jim Dunne
[340] Muzellec, L., & Lambkin, M. (2006). Corporate Rebranding: Destroying, Transferring or Creating Brand Equity? European Journal of Marketing, 40(7/8), 803-824
[341] Personal interview with Jim Dunne and Alfie Kane
[342] Ibid
[343] Business 2000. (1999-2000b). Eircom - Corporate Identity and Change. 3rd Edition Case Studies
[344] MacCarthaigh, S. (1999, 8th January). Costly Rebranding in Line with International Trend. The Irish Times, p. A5
[345] Personal interview with Alfie Kane
[346] Personal interviews with Jim Dunne, Gerry Fahy and Alfie Kane
[347] Personal interviews with Jim Dunne and Alfie Kane
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[383] The word Three is used to describe the brand in this text although it is generally represented as 3 in branded communications
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[425] These included: UK roaming tariffs, prepay tariffs, postpay tariffs, ethnic tariffs, tariff, mobile content, global sponsorship support, local sponsorship support, business tariffs, Christmas brand and handset campaigns, the online store, long term brand signage properties. Personal recollections by Helen Marks and Personal interviews with Enda Lynch and Rosemary Steen
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[427] Personal interviews with Tara Delaney, Enda Lynch and Rosemary Steen
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[440] Personal interviews with Celine Fitzgerald, Dorothy Kelly and David McCarthy
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CHAPTER 6 CROSS CASE ANALYSIS

6.1 INTRODUCTION

The structural changes observed in the industries were disparate. For example: wholesale grocery consolidated whereas telecoms fragmented; wholesalers' customer base declined and telecoms' grew; the balance of power in the value chain shifted 'downstream' in wholesale grocery and 'upstream' in telecoms. Both industries' boundaries evolved and in both cases branding capabilities were imported from outside the industry. Similarly active branding was initiated as a result of change in the industry context, brand management decisions were enacted at the level of the firm, brand played a role in both horizontal and vertical competition and approaches to brand architectures were essentially an industry level phenomenon. Finally the value of brands, particularly brand equity, was seen as important by managers and yet its definition and metrics was inconsistent and attributed no monetary value. Any explanation of how brands influence industry evolution (the primary question) and the nature of brand and its evolution (the secondary question) must address all these factors.

This chapter presents an analysis of the empirical evidence presented in Chapters 4 and 5 and begins building an understanding of the role of brand in industry evolution. As such it presents Stages 5 (identifying the evolution of brand) and 6 (case analysis) of the data analysis as outlined in Chapter 3 (Section 3.6.4). The analysis will be completed with the meta-analysis in Chapter 7. Each case narrative reconstructed the evolution of an industry including the emergence and development of branding and brand management. Common to both was the evolution of the brand construct throughout the narrative. This insight was the basis on which the case narratives were periodized and this will be addressed early in this chapter.

The analysis draws on the case narratives and the brand expert interviews to start reconstructing the processes by which brand influenced industry level change. It commences with a within case analysis of wholesale grocery (Section 6.2) followed by telecoms (Section 6.3). These start with analytical chronologies in context consistent with the contextualist nature of the research. They are organised and discussed in line with the analytical framework (Figure 6-1) which expands the exploratory framework (Figure 2-7) by making elements of the construct emerging from the data explicit. This enables consistent themes and patterns to be identified particularly with respect to the agency of brand, the importance of context and the influence of brand equity (the history of previous brand activity). The chapter progresses to the cross case or thematic analysis. Once again guided by the analytical framework it builds on the themes identified in the within case analyses and introduces seven processes through which the agency of brand influence industry evolution.

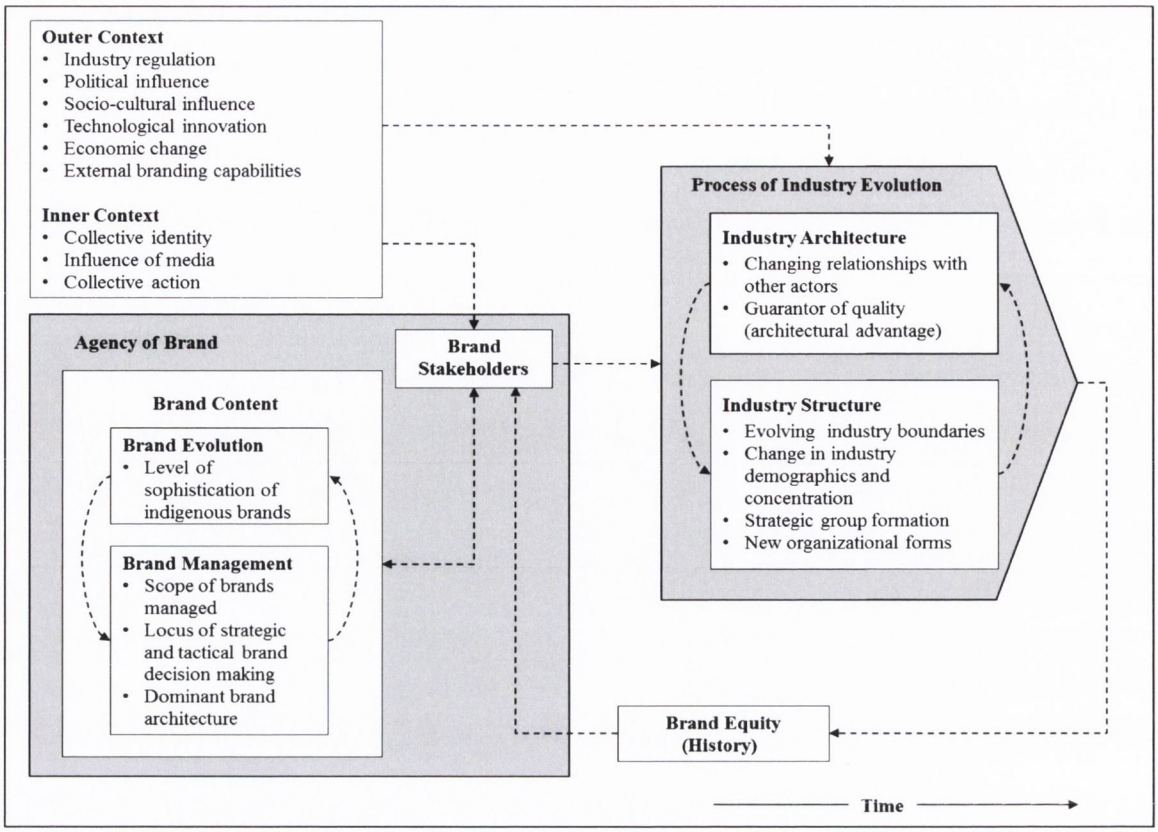


Figure 6-1 Analytical Framework

6.1.1 Evolutionary Stages of Brand

The case data was initially periodized with respect to key events in the industry and its environment, but early inductive analysis indicated that these triggered evolution in brand. Therefore the case narratives adopted an *ex ante* approach to periodization in keeping with the method of analysis outlined in Section 3.6.4. Furthermore this insight, whilst not identifying the nature of the brand, suggested that context is a contributory cause of its evolution. To ensure the earliest influences of brand were identified each case narrative commenced before there was evidence of active branding in the focal industry even if suppliers or customers were engaged in branding. This highlighted a need for a nomenclature for the antecedents and subsequent evolutions of brand which could be used throughout the analysis. The names chosen were: (i) proto brand[1]; (ii) basic brand; (iii) augmented brand; and (iv) evolved brand. These names and their explanations describe the level of brand evolution and extant scope of the brand construct (see Appendix O for fuller explanation). Brand evolution in the exploratory framework refers to brands controlled in the focal industry. However brands throughout the value chain influence industry dynamics and these brands may be more or less evolved than the industry's brands.

[1] Based on Moore and Reid's (2008) term for the earliest brands.

6.2 WITHIN CASE ANALYSIS—WHOLESALE GROCERY

The structure of this analysis and the within case analysis of telecoms (Section 6.3) follow the same structure. They start by identifying the point at which active branding commenced and what precipitated this variation. They move on to the analytical chronology and the overall changes in industry structure. Finally the role of agency and brand equity in this change is explored.

Manufacturers' brands were features of the grocery sector since the late 19th Century, elements in retailers' product portfolio and distributed by grocery wholesalers. Retailers were family run counter service stores trading with local wholesalers delivering small volumes on credit. There was no perceived need to brand retailer or wholesaler beyond the family name as an identifier and signal of ownership (proto brands). In the 1950s factors confluxed to bring about change. Post war supply constraints alleviated stimulating competition amongst suppliers and the emergence of brand management. Supermarkets emerged and small retailers started to close. These trends triggered retailer collaboration and the establishment of a buying cooperative ADM in 1953. The Retail Prices (Display) Order (1955) and the end of RPM (1958) introduced price competition and as a corollary cut-price retailing. Wholesalers' survival strategies included voluntary group retailing, enabled by buying group alliances and cash and carry wholesaling. Branded signs provided a device to make them tangible and attractive to customers. Thus the introduction of the Golden Goose symbol by EDL in 1960 is identified as the start of branding in wholesale grocery.

6.2.1 Analytical Chronologies

The first chronological analysis of the case was periodized based on significant events, contextualized with respect to the level of brand evolution, coetaneous approaches to brand management, industry structure and architecture. Industry architecture is difficult to reconstruct retrospectively so the level in the value chain where the relationship between customer and brand is strongest (the guarantor of quality) is used as an indicator of bargaining power and architectural advantage. Brand equity is not included in the table, not because it is unimportant but because contemporary recollections were often imprecise, its attributes often tacit, and its measurement derived from disparate assumptions and methods. Archival brand equity data either does not exist or was not discovered. Moreover B2B brand equity was seldom measured, except late in the narratives, despite these customers' importance. The chronology is explained and presented in Appendix P. Table 6-1 presents the second chronological analysis periodized from the perspective of brand evolution. The horizontal axis shows the evolving nature of brand and the vertical axis shows the brand content, dominant brand architecture[2], strategic roles fulfilled by the agency of

[2] A house of brand strategy is a multi-brand architecture with standalone brands at the product or service level. The opposite extreme is the corporate brand architecture (also known as a branded house) where product names are secondary to the company name. Hybrid architectures exist between these extremes

Table 6-1 Brand Evolution in Wholesale Grocery

		Before 1960 (T_1)	1960 - 1979 (T_2)	1980 - 2006 (t_3)	2006 - 2011 (T_4)
		Proto Brand	**Basic Brand**	**Augmented Brand**	**Evolved Brand**
Brand Content	**Brand evolution**	Embryonic brands. Identifier of ownership (name and logo).	Simple form of branding. Brand as identifier and differentiator	Enhanced form of brand. Brand as positioning and personality.	Holistic form of brand. Brand as organizing principle.
	Types of brand managed by wholesalers	(Company Reputation).	Corporate brand. B2B brand. Retail brand.	Corporate brand. Retail and B2B trading brands. Service brand. Employer brand.	Corporate brand. Retail and B2B trading brands. Service brand. Internal and Employer brand.
	Brand management	No evidence of active brand management beyond generating sales and managing identity and reputation.	Mainly tactical and junior. Senior management main interest in naming & own brand strategies. Marketing professionals recruited into the industry introduced branding capabilities.	More strategic approach & senior management responsibility. Tactical enactment at junior level. Internal branding emerges.	Encompass functions not previously considered brand, driving closer alignment with business model, brand architecture & branding activities. Senior management priority.
Dominant brand architecture		(Company name)	House of brand	House of brand	House of brand
Strategic Roles Fulfilled by the Agency of Brand		Identifies origin & signals ownership. Reduces perceived transactional risk	T_1 plus: Differentiator - confer credibility & legitimacy - signal organizational form - create barrier to entry - communicate quality - make new technology tangible- exert pressure on suppliers - locus of consolidation - build customer relationships - protect revenue base - create standards - facilitate routines - inter-firm cooperation - economise on marketing spend	T_2 plus: segment and strengthen customer base - manipulate exchange environment - enforce standards - facilitate cultural change – exert channel power- capture value of acquired assets - locus of expansion - strengthen emotional loyalty - reinforce barrier to entry - optimise organizational form - create sense of identity.	T_3 plus: influence internal power structure - optimize organizational form -align employee behaviours with business model- humanise corporation.
Source of brand expertise		Advertising agencies	Advertising & design agencies	Advertising & brand agencies	Agencies, senior & line managers.
Triggers for change		Deregulation. Industry demographics. Social change (mobility & urbanisation). New retail technologies (supermarkets & self-service). Declining customer base. Power of suppliers	Regulatory environment. Social patterns (shopping / eating habits) - trolley & convenience shopping - out of home eating. Technology. Geographic expansion. New substitute markets (multiples). Organizational change. Media pressures. Collective action.	Regulatory environment. Economic environment. Technology. Social change (demographics including ethnic market). Consumer brand knowledge. New entrants. Company leadership.	

brand, the source of brand expertise and some contextual 'triggers for change'. The data suggests that as the industry evolved it triggered corresponding evolution in the scope of brand. Each expansion in the types of brand managed and the roles they fulfilled was incremental. These evolutions of brand transverse one or more of the periods identified in the first chronological analysis (Appendix P). Thus it appears that significant force must accrue before stresses in the environment require brand to evolve and the data indicates that not all firms were at the highest level of evolution. Chronologies show what change transpired but not brand's role in this change.

6.2.2 Changes in Industry Structure and Industry Architecture

Changes observed in industry structure and architecture are summarised in Table 6-2. This fragmented industry consolidated and concentrated, becoming dominated by Musgraves and BWG. The nuclei of consolidation were the buying groups which launched branded symbols[3]. Thus SPAR and Value Centre wholesalers formed the basis of BWG, VG wholesalers Musgraves, and Keencost wholesalers Stonehouse. Symbol retailers were a distinct organizational form, a strategic group perceived by independent retailers as offering a solution to contextual challenges including the growth of multiples. The second iteration of symbols brands were more differentiated, reflecting distinctive shopping modes including trolley and convenience. Brand helped raise standards in wholesale and retail outlets and seize the opportunity presented by the under-developed QSR market.

Recognisable fascia conferred legitimacy on retailers and marketing support. Smaller multiples such as Roches and Pettits aligned with wholesalers for buying efficiencies and marcoms support. Brands blurred industry boundaries for competitors, consumers and legislators and helped stretch the influence of wholesalers forward into retailing, forcing them to 'think retail', and back towards suppliers to develop own brand. Despite differences between firms the analysis indicates forces driving conformity amongst surviving wholesalers creating relational and transactional retail brands, convenience and forecourt formats, cash and carry and foodservice brands and segmented own brand strategies.

Changing balance of power in the value chain is crucial in understanding brand's influence in the evolution of wholesale grocery. This battle was fuelled by governments' quests for competitive food prices, the multiples use of brand-centred price wars, the media's challenging of food prices, and wholesalers using brands in collective action. Multiples effectively disintermediated wholesalers from parts of the retail market, but wholesalers mimicked their model through symbol

[3] The term 'symbol' is used in this chapter to describe all forms of wholesaler managed voluntary group retailer whether they are relationship or transactional based unless specifically identified.

	1960	2011	Change
Wholesale Grocery Outlets	258 (1956)	93	**Consolidated**
Industry Concentration	11 firms 23% (1956) (Fragmented)	5 firms 95%. 2 firms 80% (Consolidated)	**Concentrated**
Boundaries of Industry	Ambient Food distribution.	Food, non-food & foodservice distribution. Retail development & management.	**Expanded**
Identity of Industry Actors	Wholesalers. B2B service providers.	Managers of distribution channel to final consumer.	**Enlarged**
Customer Base:			
Retailers	16,853	6,608	**Declined**
Foodservice	n/a (small base)	12,749 (2009)	**Grew**
Market Share (Retail)	~ 98%	31%[4]	**Declined**
Organizational Form(s)	Full service, local, delivered grocery wholesalers.	National & multi-national wholesalers. Multi-divisional. Voluntary multiples. Convenience retailers.	**Expanded**
Relative Brand Knowledge & Capabilities	Suppliers to industry are more advanced. Wholesalers do not see it as a requirement.	Wholesalers match suppliers. Use of external agencies mitigates supplier / customer advantage.	**Increased**
Scope in Industry	Sale & distribution of ambient brands to retailers.	Development of own brand. Distribution & sale of food & non-food. Retail development. Brand management.	**Expanded**
Relationship with other actors	Buyer of brands from suppliers. Transaction based sales relationship with customers. No direct relationship with consumers.	Develop own brand & buyer of brands. Contract & transaction based relationship with customers. Direct brand relationship with consumers.	**Strengthened**
Bargaining power	Weak	Strong	**Strengthened**
Guarantor of Quality	Supplier Brands.	Retail Brands (including wholesaler owned).	**Strengthened**

Table 6-2 Wholesale Grocery Changing Structure and Architecture

retailing, and extended into new markets especially foodservice. Whilst the multiples and symbols fought to win consumers' trust, manufacturers brands retained their ascendancy until the repeal of the Groceries Order and the onset of recession in 2008 saw own brand sales accelerate. However, consumers still demanded proprietary brands and suppliers consolidated to exert countervailing power. Wholesalers used backward facing power to negotiate favourable terms for brand and own brand products on which they kept stringent quality control. But the global scale of some multiples was such that they could negotiate better terms than even Musgraves. Figure 6-2 shows a simplified representation of the changes in the industry value chain between 1960 and 2011 indicating how architectural advantage shifted from supplier brands to retailers and foodservice providers who emerged as the guarantor of quality. It also illustrates the increasing complexity of branding processes within the overall business system.

[4] Supervalu and the other symbol groups share was 25% in July 2011 when Musgraves acquired Superquinn which had a 6% market share.

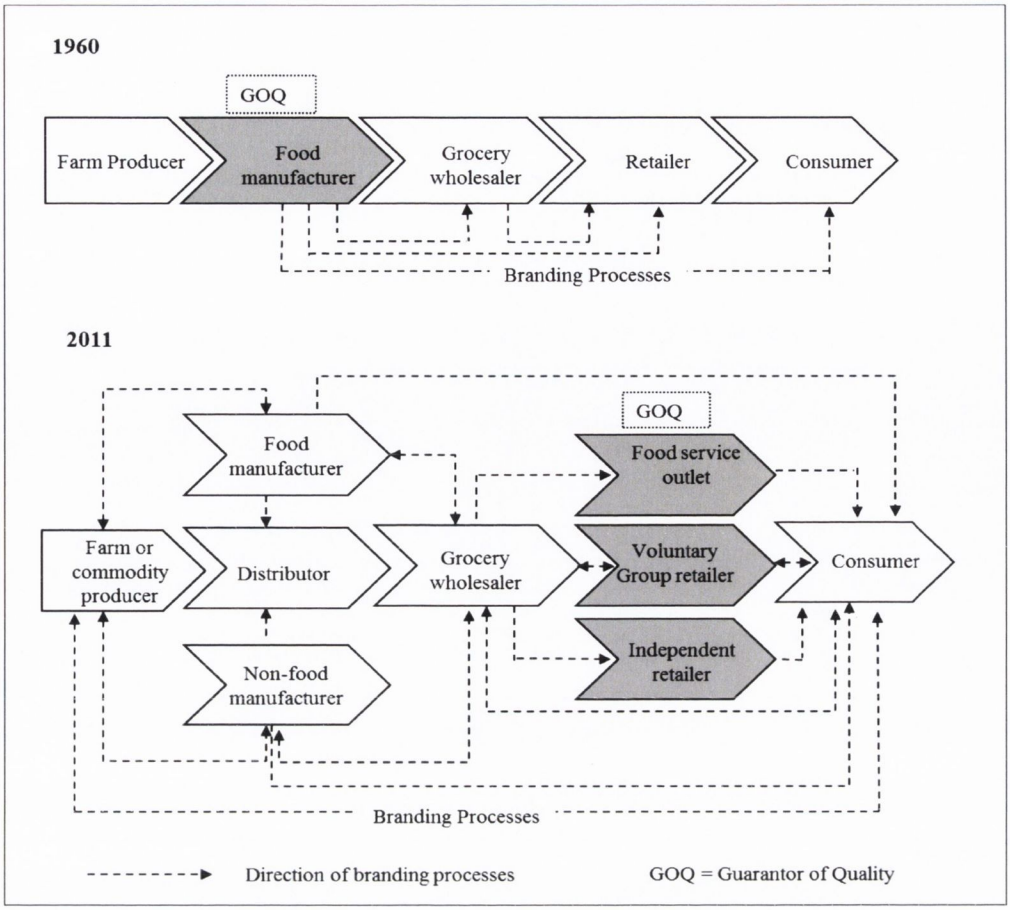


Figure 6-2 The Changing Grocery Value Chain

6.2.3 Brand Management

Having explored the importance of context in industry change and reviewed industry level change the discussion moves to the role of managers and the agency of brand. Simultaneous to the growth of symbol retailing, marketing professionals with FMCG and advertising agency experience were recruited into the industry and marketing departments evolved from this point. Marketers understood manufacturers' sales and branding processes and drew on these to develop marketing support across symbols and cash and carry. They reframed relationships with suppliers and exerted buying power, for example delisting secondary brands. This facilitated own brand strategies which evolved from tactical price propositions to strategic elements in the buying function, helping redress the balance of power, and becoming integral elements in distributors' brands. Unlike marketers some industry leaders had more tacit understanding of brand but clear business visions. David Tyndall saw the potential of SPAR, John Smith understood the need to rebrand VG to overcome store heterogeneity and a high price image and Hugh MacKeown saw Musgraves' brand portfolio as a vehicle for geographic expansion. Gradually more explicit senior management focus on brand management emerged and the level of brand knowledge relative to other firms in the value chain increased, moderating suppliers' advantages.

Brand architectures evolved to address changing trading environments and business strategies, balancing the efficiencies of a simple architecture with requirements for differentiated propositions. The leading firms developed similar brand architectures consisting of a corporate brand plus a house of brand strategy for trading brands. Each brand helped B2B customers identify levels of marketing and service support plus the degree of loyalty demanded of them. Corporate brands signalled wholesaler's approach to loyalty, for example Musgraves demanded greater compliance than BWG across relational brands.

The management of the trading brands was critical to resource allocation, more going to brands wholesalers tightly controlled (hence the historic weakness of Mace due to its dispersed ownership). Each brand required marketing investment to compete for customers including high levels of marcoms for those competing with multiples. New brands, sub-brands and partner brands were launched to address changing customer and consumer needs and signal innovations. For example, SPAR Eight Till Late met a demand for convenience and SPAR Express forecourt customers' requirement for a bespoke proposition. This role continued to be a significant part of brand strategy[5] and was evident in own brand strategies. Dual-brand strategies included Insomnia becoming SPAR's coffee shop brand and EuroSpar's foodservice sub-brands targeting lifestyles and locations. Rebranding and repositioning kept brands relevant to changing market requirements and business and brand strategies, for example: Musgrave Cash and Carry signalled a new approach to wholesaling but Musgrave MarketPlace facilitated repositioning Musgraves as a corporate brand. Rebranding was most evident in symbol retailing but left unsupported legacy brands which undermined retailer loyalty. Brands acted as loci for growth and geographic expansion for wholesalers, examples including Musgraves purchase of L&N, and H.Williams outlets to control and build SuperValu and Centra. BWG's acquisition of Mangans consolidated the Mace brand and increased the efficiency of the Value Centre brand.

The organizational structure of some wholesalers reflected brand strategy. Musgraves SCD was named to reinforce the primacy of SuperValu and Centra brands and rebranded MRPI to acknowledge the uniqueness of each. Transaction based brands such as DayToday and XL were managed within wholesale divisions. Corporate brands had supplier and market facing roles as well as being employer brands. Internal branding helped integrate acquisitions and effect organizational change. For example, Chris Martin exploited brand to bring about change in Musgraves and engage affiliated retailers in this process.

[5] Other examples include SuperValu for trolley shopping, Carry Out an off licence brand, Buy Lo a discounter brand.

6.2.4 Agency of Brand

Most brand decisions and branding activities were routine yet brand played a role beyond what these routines were considered to perform, namely reducing risk, horizontal competition (including marcoms), making new organizational forms (e.g. symbol groups) or distribution technologies tangible to stakeholders and (latterly) organizational change. These included: helping industry consolidation; extending the influence of a brand across the value chain and into new market spaces; and helping wholesalers adjust to environmental change. The purpose of these strategic processes is not brand building and cannot be described as branding. This insight formed the basis for inductive analysis which suggested that the agency of brand was manifest in seven distinct brand processes.

6.2.5 Brand Equity

Understanding and leveraging brand equity increased over time. Initially perceived as the domain of products, the influence that brands exerted over consumers became a challenge for the wholesalers in building their trading brand equities. Sophistication of measurement increased as the realisation that, despite the difficulty in measuring brand value, the strategic importance of these measures was important to strategic management. Yet the attributes of brand equity remained ambiguous.

6.3 WITHIN CASE—TELECOMS

The telecoms monopoly was established in 1905, persisted in the Irish Free State and ROI within the Department of Posts and Telegraphs (P&T) remaining the sole supplier of telecoms until deregulation in the last part of the century. There is little evidence of this monopoly's brand being managed beyond serving as an identifier of a service and employer (a proto brand). The monopoly extended to CPE giving handset manufacturers little incentive to brand build. By 1970 the telecoms service was operating at a loss and the P&T was failing to satisfy customer demand or invest sufficiently in new technologies. Simultaneously deregulation abroad, accession to the EEC, the international business market, and customer dissatisfaction culminated in the Dargan Review (1978) recommending the establishment of a modern telecoms company. The outcome was Telecom Éireann, a semi-state monopoly. The launch of Telecom Éireann in 1984 is identified as the start of basic branding in telecoms.

6.3.1 Analytical Chronologies

The first chronological analysis of the telecoms industry is presented in Appendix Q[6]. Table 6-3 shows the second analysis of the case data periodized from the perspective of brand evolution. The data suggests that industry evolutionary forces triggered evolution in the scope of brand and brand management and significant forces accrued before brand evolved to the next level.

6.3.2 Changes in Industry Structure and Industry Architecture

Table 6-4 summarises changes in the industry structure and architecture. The industry fragmented and became less concentrated, although the table's figures mask waves of fragmentation and consolidation. As new technologies launched new market sectors emerged most notably in mobile and data. To customers, competitors and other stakeholders (including government and the regulator) these new sectors had such distinct identities that they were perceived as *de facto* industries which brands helped identify and demarcate. Thus Eircell, Esat Digifone, Meteor and subsequent brands in the market became the 'mobile industry', brands such as Indigo and Postgem/IOL 'ISP providers', Esat Telecom and TCL the 'new telecoms industry', Cablelink and Chorus 'cable providers', etc.

Having facilitated diversification brands subsequently facilitated consolidations. For example Perlico, Interfusion Networks and Complete Telecom consolidated into Vodafone as it moved into fixed. However access devices (handsets, smartphones, etc.), with the exception of data 'dongles', remained a discrete level of the industry with little evidence of own brand success. Competitive brand building expanded the size of the industry, the growth during the brand wars between Eircell and Esat Digifone being an extreme example, while simultaneously high levels of advertising created barriers to entry for telcos with fewer resources. Brands continually served to redefine industry boundaries stretching to encompass mobile telephony, fixed and mobile data, and subsequently broadband, content and media. Many commonalities can be observed across the firms within the industry indicating forces for conformity. All adopted a branded approach from launch to confer legitimacy. The corporate brand architecture with product and proposition sub-brands dominates, subsidisation of handsets, initiated to build a customer base on mobile networks, became institutionalised facilitating increasing ascendancy of handset brands.

[6] The explanation for this table is the same as for Appendix P.

		1922 - 1983 (T_1)	1983 - 1994 (T_2)	1994 - 2006 (T_3)	2007 - 2012 (T_4)
		Proto Brand	**Basic Brand**	**Augmented Brand**	**Evolved Brand**
Brand Content	**Brand evolution**	Embryonic brands. Identifier of ownership (name and logo).	Simple form of branding. Brand as identifier and differentiator	Enhanced form of brand. Brand as positioning and personality.	Holistic form of brand. Brand as organizing principle.
	Types of brand managed by Telcos	(Reputation) (Products).	Corporate brand. Product brand. B2B brand. Service brand. Retail brand. Employer brand.	Corporate brand. Product brand. B2B brand. Service brand. Retail brand. Employer brand.	Corporate brand. Product brand. B2B brand. Service brand. Retail brand. Internal & employer brand.
	Brand management	No evidence of active brand management. Civil servants manage relationships with stakeholders. No perceived need to brand or market services.	Tactical rather than strategic, with little senior management involvement. Increased interest as brand champions entered the industry.	Increasingly strategic concern. Brand management coevolves with competitive activity. Tactical activity handled by junior managers. Measurement rudimentary. Global MNOs	Ownership of brand senior, tactical more junior. Brand used to consolidate acquisitions & optimise efficiencies. Brand engagement becomes aligned with customer satisfaction management
Dominant brand architecture		(Reputation)	Corporate	Corporate	Corporate
Strategic Roles Fulfilled by the Agency of Brand		Identifier - signify ownership - legitimacy - employer brand	T_1 plus: Create product differentiation. Generate future revenues - diversification - mitigate risk of new technologies - identify strategic groups - signal & explain innovation to customers - deepen relationship with customers - act as barrier to entry - attract capital. Create legitimacy for new entrants	T_2 plus: Segment & differentiate - - reflect organizational structure - exert power in channel -build emotional loyalty with customers - enforce standards - enforce standards - create cultural change	T_3 plus: Protect revenues & profitability - adapt to converging technological environment - integrate acquisitions internally - manage relationships with new entrants (e.g. MVNOs) - help avoid commoditisation and value erosion
Source of brand expertise		Advertising agencies	Advert, design & brand agencies	Agencies, senior & line managers	Agencies, senior & line managers
Triggers for change		Political environment, unfulfilled demand, technological change, nascent competition, need to attract capital.	Deregulation & legislation, EC influence & power, competition, social change (mobility & demographics), entrepreneurial action, organizational change, media pressure.	Convergence of technology, political pressure, commoditisation of voice, powerful new entrants in supply chain, economic environment, global operators, media pressure, new media.	

Table 6-3 Brand Evolution in Telecoms

	1983	2012	Change
Telecoms Operators	1	461 (Not all active)	**Fragmented**
Industry Concentration	~ 100% (Monopoly)	58 companies > 95% (Fragmented)	**Fragmented**
Boundaries of Industry	Supply of fixed telephone & data services and access devices	Fixed & mobile telephone & data services. Retailing of access devices. Media & content.	**Expanded**
Identity of Industry Actors	Civil service department. Telecoms provider.	Communications & entertainment service providers	**Enlarged**
Customer Base:			
All Users	601,000	> 4 million	**Grew**
Mobile Penetration	0	107 (peak 115 in 2007)	**Grew**
Broadband[7]	0	~ 65%	**Grew**
Market Share (Incumbent)	~ 98%	40%	**Declined**
Organizational Form(s)	State owned monopoly telecoms provider	Indigenous & MNC operators. Fixed telephone & data providers. Converged fixed & mobile providers. Media aggregators & content suppliers. MVNOs	**Expanded**
Scope in Industry	Production, sale & distribution of telecoms products & access devices.	Production, retailing & wholesaling of fixed, mobile telephone & data services. Retailing of access devices. Aggregator & producer of content.	**Expanded**
Relative Brand Knowledge & Capabilities	Suppliers to industry equal or advanced. Telecoms do not see it as a requirement	Suppliers match or exceed telcos. Use of external agencies mitigates supplier advantage	**Static**
Relationship with other actors	Buyer of production & access devices from suppliers with little or no direct relationship with consumer. Monopoly supplier of service to customer base. Direct relationship with consumers.	Direct brand relationship with customers - consumer relationship more diffused. More transient relationship with customers. Weakening relationship with handset & content suppliers who determine consumer choices	**Weakened**
Bargaining power	Strong	Weakening	**Weakened**
Guarantor of Quality	Telco Brand	Supplier Brands	**Weakened**

Table 6-4 Telecoms Changing Structure and Architecture

Figure 6-3 shows a simplified representation of the changes in the industry value chain between 1922 and 2012. Until market liberalisation the incumbent had minimal competition and required only a proto brand to communicate with customers and suppliers. With the advent of competition branding activity increased across the value chain. From 1994 the power of the 'brand in hand' as a differentiator grew until the market entry strategy of Apple's iPhone tipped the balance of power. In addition the advent of WiFi democratised the Internet, the growth of social media and access to media rich content helped commoditize telephony products, all of which saw handset brands supersede telco brands as the guarantor of quality.

[7] Household broadband penetration is displayed.

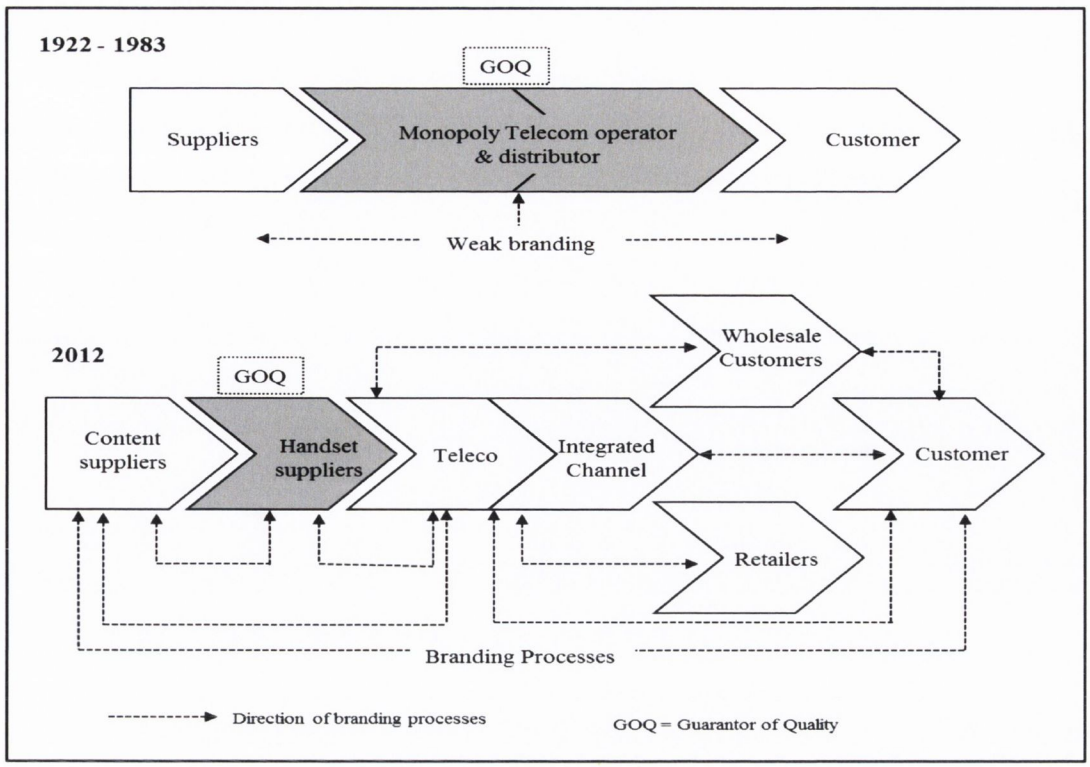


Figure 6-3 The Changing Telecoms Value Chain

6.3.3 Brand Management

The civil servants who managed the P&T displayed little interest in brand management but individuals entering the industry from the private sector impacted on attitudes to brand and its management. Michael Smurfit regarded Telecom Éireann's identity as important in signalling change of ownership but marketing was weak in the organization, brand management diffused, brand architecture erratic and inefficient. When Alfie Kane became CEO he perceived brand as a vehicle to change behaviours and create a more customer centric organization. Stephen Brewer instigated a brand led strategy in Eircell transforming the launch of GSM into a brand relaunch, creating difference from Telecom Éireann, the basis for a new industry segment, excitement in the market and a strong customer base before the arrival of competition. Contemporaneously Denis O'Brien saw brand as an essential tool, engaged brand experts and branding techniques to put brand at the forefront of Esat's business development strategy. Other entrepreneurs needed a brand to be seen as credible operators although many lacked brand management capabilities and the brands created were basic.

Over time brand knowledge and capabilities expanded across all levels of the value chain. The level of investment in brand was contingent on brands perceived importance in overall strategy and available resources. Thus at times there was 'lip service' to brands rather than a strategic focus on them, for example in Eircom during the O'Reilly era and the latter part of Donovan's tenure

financial and structural concerns eclipsed brand. The speed with which new technologies and propositions emerged generated an ongoing requirement to make these meaningful to customers and employees. Evidence includes: proliferation of brands in Telecom Éireann between 1984 and 1994; use of branding by mobile network operators (MNOs) to make data products meaningful with brands such as Vodafone live!; ongoing support of tariff brands. The corollary was a requirement to manage brand architectures to create difference and efficiencies in marketing. The industry became characterized by high levels of marcoms investment which could negatively impact on the profitability of the firm (for example both Eircell and Esat in the late 1990s). Those with fewer resources either concentrated on a sector or niche, for example TCL in B2B, or failed.

Branding created imagery and identity for telcos prepared to invest. Meteor's value proposition and challenger personality was common to their external proposition and internal behaviours. The rebrand of Telecom Éireann to Eircom was an attempt to modernize and relaunch the organization, while the rebrand of UPC showcased the results of investment in infrastructure and customer care. Brand signalled changes in ownership through acquisition. The dropping of the Esat name from Digifone distanced the mobile brand from its parent, the retail chains were rebranded to extend MNO brands into retail and Vodafone managed the rebrand from Eircell to retain its brand equity. The resources provided by global parents' included brand expertise and marcoms materials which were valuable to companies like Vodafone, O_2, Three and BT. Finally there is evidence that internal branding was used in an attempt to change behaviours and create consistent brand experiences most notably in Vodafone and Eircom.

6.3.4 Agency of Brand

Brand helped build trust, was essential to inter-firm competition, was a factor in vertical competition and was used for internal change initiatives. Brands identified new strategic groups and made new technologies tangible, facilitated fragmentation and consolidation and helped telcos survive environmental change. These seven processes were perceived to capture the agency of brand and formed the basis for inductive analysis to determine the nature of these processes.

6.3.5 Brand Equity

Little attempt was made to measure the equity of brands until competition in the mobile sector emerged. It remained unsophisticated until the arrival of global brands in the noughties since when it has become a standard industry metric. Strong brand equity acquired in one segment (e.g. mobile) helped operators gain consideration in another (e.g. fixed), helping grow the overall business. However, some senior managers struggled to see the relationship between brand equity metrics and business performance and the traditional migration of acquired brands to the corporate brand of the purchaser means that brand equity was rarely included in the sale price of a telco.

6.4 CROSS CASE THEMATIC ANALYSIS

Having completed the two independent within case analyses the remainder of the chapter draws them together to explain similar patterns and themes emerging across both industries. These include:

- Brands evolved through the same stages but at different intervals and environmental change triggered industry and brand evolution;
- The scope of brands managed and the strategic roles fulfilled by brand expanded;
- Brand management became more senior and an explicit element of firms' strategic management;
- External agencies and imported capabilities were important in diffusing brand knowledge and capabilities across the industry;
- Brand equity was deemed important but its definition and value was elusive;
- Industry boundaries and architectures showed periods of stability and change;
- The agency of brand was delivered through seven brand processes which were important in delivering business strategy.

Section 6.4.1 compares the changes in industry structure between the two industries, the product of the evolutionary processes being explored. The analysis then looks at the influence of the outer context (Section 6.4.2) and inner context (Section 6.4.3) before moving to brand content. Here brand evolution (Section 6.4.4) and changes in brand management (Section 6.4.5) are discussed. Brand equity (the history of brand activity) is discussed in Section 6.4.6 thereby addressing the final element in the analytical framework deemed to influence brand stakeholders. A specific element of Stage 6 of the data analysis (see Section 3.6.4) is the identification of the agency of brand. Section 6.5 introduces and explores the seven brand processes with respect to their influence on industry evolution.

6.4.1 Changes in Industry Structure and Architecture

A comparison of indicators of structural and architectural change is displayed in Table 6-5 and shows similarities and differences between industries. Structurally wholesale grocery consolidated whereas telecoms fragmented. But industry boundaries expanded in both and boundary changes are evident in how interviewees identified their industry's sphere of influence and competitive set. For example, wholesalers extended their scope from wholesaling into retail development, brand management and consumer marketing becoming perceived as powerful competitors in retail grocery. Telcos divided into fixed, mobile and data companies and re-converged into multi-platform providers of media and communications. Change in industry structure was constant whereas industry architecture was more resistant to change but still evolved. The bargaining power of wholesalers increased as did their relative level of brand capability within the value chain. They

demanded standards of delivery and compliance from retailers and created a direct relationship between their brands and consumers helping create architectural advantage. Although the brand capabilities of telcos increased so did suppliers' who used them to build relationships with consumers. In addition handset suppliers increasingly dictated trading terms to telcos whilst consumers expected the value-eroding practice of subsidization to continue. Handset suppliers were able to capture more value and shift architectural advantage from the telcos.

		Wholesale Grocery	Telecoms
Structural Indicators	**Wholesale Grocery Outlets**	Consolidated	Fragmented
	Industry Concentration	Concentrated	Fragmented
	Boundaries of Industry	Expanded	Expanded
	Identity of Industry Actors	Enlarged	Enlarged
	Customer Base:	Consolidated (Retail) Grew (Foodservice)	Grew
	Market Share	Declined (Retail). Grew (Foodservice)	Declined (Incumbent)
	Organizational Form(s)	Expanded	Expanded
Architectural Indicators	**Scope in Industry**	Expanded	Expanded
	Relative Brand Capabilities	Increased	Static
	Relationship with other actors	Strengthened	Weakened
	Bargaining power	Strengthened	Weakened
	Architectural Advantage	Increased	Decreased

Table 6-5 Comparisons of Structural & Architectural Change

6.4.2 The Outer Context—Institutional Environment

Political and Legal Context

Consecutive governments saw controlling grocery and later telecoms prices as a political imperative, and deregulation such as the repeal of RPM or ending the telecoms monopoly plus legislation including the Groceries Orders and Competition Act were enacted to stimulate competition. Competitiveness was under scrutiny by quangos such as the FTC, ComReg and the Competition Authority. Ireland's accession to the EEC in 1973 opened the market to more grocery brands while an additional legislative institution impacted on the intensity of extant competition, particularly telecoms. Domestic legislation and political pressures dominated grocery distribution. Between 1987 and 2006 the wholesale grocers and suppliers were partly protected from the multiples by the Groceries Orders and Planning Directives but the repeal of the Orders removed the ban on below cost selling triggering consolidation. It diminished the power of branded suppliers accelerating mergers and the formation of operations with extensive brand portfolios.

Challenges to the monopoly telecoms model migrated to Europe where political attitudes towards competition were favourable towards deregulation. This encouraged entrepreneurs to lobby for

opening the Irish market, and European competition legislation helped achieve this objective. For example, the Leased Line Directive of 1992 forced Telecom Éireann to supply leased lines to all licenced service providers creating an environment conducive to the expansion of brand activity. Domestic concerns were responsible for the forced sale of Telecom Éireann's share in Cablelink opening the cable market to NTL. Privatisation of utilities operators overseas influenced the Irish government's approach to the sale of Telecom Éireann, whilst political pressure precipitated the sale of Eircell to Vodafone with global brand building capabilities. Conversely regulation acted as a barrier to entry such as restricting mobile network licences or inflating licence price through auctions. Finally, Eircom was obliged to provide unprofitable services (e.g. telephone directories, public telephones) as well as wholesale services to other operators[8].

Economic Context

The economic environment influenced the types of brand in the market and their roles. Changes in currency (decimalization in 1971, Euro in 2002), inflation, and price wars undermined consumers' price awareness stimulating a need for reassurance. For example, VG's *"I Trusted VG all Along"* campaign during decimalization. High food inflation stimulated the growth of discount multiples in the late 1970s and the arrival of generics in the early 1980s. The effects of the banking crisis in the late noughties accelerated the rise of discounters and the growth of own brand and tertiary brands. Similarly the fall in telecoms prices and the launch of Mobile Virtual Network Operators (MVNOs) from 2007 illustrate telcos' reactions to declining revenues as customers sought value. In a buoyant economy, characterised by the Celtic Tiger, phenomena such as brands as badges of success, conspicuous consumption and convenience brands were prevalent. However, companies seen to benefit from this environment, especially leaders including Musgraves, Vodafone and O_2, were categorised by the media as anti-competitive and taking excessive profits making their brands vulnerable to reputational damage.

Socio-Cultural Context

Urbanization, the advent of shopping centres and increased mobility facilitated the growth of supermarkets from the 1960s. Foreign travel, declining household size and changes in eating patterns influenced the products customers demanded, stretching the boundaries of the grocery sector and the scope of the firms within it. For example, wider penetration of refrigerators drove demand for chilled and frozen food in the 1960s and wholesalers expanded into this territory. Interest in ethnic foods expanded cash and carry and symbol store product portfolios. Out of home eating stimulated the growth in foodservice. Similar factors influenced telecoms. Telecom Éireann could not meet demand for telephones until the 1990s, creating an opportunity for mobile

[8] This is a result of their universal service obligation and their designation as having significant market power.

telephony and resentment towards the brand influencing purchasing decisions as new operators launched. Mobile telephony and later WiFi satisfied growing needs for mobility and connectivity especially to the Internet and social media.

Customers became progressively brand and media literate, confident in their choices and prepared to balance imagery with value, the heritage and provenance of brands being decoded by consumers and influencing relationships with them. Tesco's British ownership impacted negatively on their first entry into Ireland but their brand strategy and product range during their second entry was reflective of local culture. The sale of Esat Digifone and Eircell to British companies raised concerns causing Vodafone and O_2 to stress their Irish credentials including investment in advertising, sponsorship and CSR. Consumer ethnocentricity was pronounced in grocery, with Guaranteed Irish becoming one of Ireland's best known brands, and Irish brands continued to command high market shares in many food categories. Wholesalers leveraged this phenomenon to exploit the local ownership of their retailers, developing community positionings for their brands and retailer contracts allowing the purchase of locally sourced products.

Technological Context

Waves of new technologies required a mechanism to commercialize them. This dynamic affected telecoms and distribution technologies including supermarkets, symbol retailing, central billing and distribution. Technology influenced how companies communicated with customers evolving from reliance on print, through broadcast media, to encompass CRM based campaigns and new media. With technological innovation brands first to market or best adapted to exploit these technologies had an advantage. For example Musgraves in cash and carry, Eircell Ready To Go in mobile pre-pay, Nokia in GSM handsets, and iPhone in the mobile Internet. Technology precipitated fragmentation of industries into strategic groups identified by specific brands such as SPAR and Mace in convenience retailing, Value Centre and Musgraves in cash and carry and Eircom and BT in fixed line telephony. Likewise, brands helped telcos stretch across multiple platforms as technologies converged and the affinity between brands and technologies eroded.

6.4.3 The Inner Context—Task Environment

Change started later and evolved faster in telecoms than wholesale grocery. Brands were always important ingredients in wholesale grocery but were controlled by suppliers, whereas brands were unimportant in telecoms until 80 years after the P&T was established. The external context shaped and coevolved with the task environment wherein technologies diffused across a customer base heterogeneous in their relationship to the industry. Customer segments emerged in tandem with changing strategic groups, industry boundaries and brands. A dominant model of brand architecture emerged early in each industry and endured throughout the timeline. These archetypes

differed with wholesale grocery adopting a house of brand architecture and telcos a predominantly corporate or hybrid approach.

The collective identity of firms changed. Wholesale grocers' identity evolved from local suppliers of ambient goods to small retailers to (national) distributors to retail and foodservice customers with a direct brand-based relationship with consumers. Preference for Irish brands facilitated the survival of indigenous wholesalers some of whom retained a local sphere of operation although most extended their influence and identity nationally or internationally. Telecoms operators changed from identifying themselves as civil servants to communications and entertainment providers. The local identity of some telcos was eroded by global operators and customer acceptance of international telco brands.

Collective action played a role in shaping the industries although only in wholesale grocery was it related to brand. During a period of political instability in the late 1980s collective action under the umbrella of RGDATA/ IADT was effective in forcing suppliers to deliver a wholesale differential and maintain competitively priced branded goods through wholesaler controlled channels. Suppliers and wholesalers also co-operated to fight the growing power of the multiples. As the industry consolidated the IADT ceased to operate and wholesaler representation became integrated with multiples. This weakening of the relationship between the wholesalers and the government may have contributed to the repeal of the Groceries Order. In telecoms collective action was associated with the resistance of Telecom Éireann/Eircom unions to change. Trade associations had little influence on the industry and their impact on brands was minimal.

The role of the media as an influencer is important. The pace of innovation in telecoms and excitement around new technologies was amplified by journalists. Retailers and telcos used programmes such as RTE's Late Late Show to launch initiatives and raise their brand profile while programmes such as Shopping Basket or Rip Off Republic undermined brand images with the public and government. New media enabled peer to peer discussions around brands creating a challenge for brand management in both industries. Telco brands have been amongst the highest spenders in advertising since the 1990s and the wholesalers, primarily through their retail brands, also maintain significant investment in marcoms.

6.4.4 Brand evolution

Conceptualisations of brand evolved from proto brands to more complex constructs utilized to execute an expanding assortment of roles. Until the early 1960s brand was the domain of consumer products with little appreciation of the existence of service, retail, B2B or corporate brands. Increased understanding saw incremental expansion of brands' scope so that each of these

types of brand manifested in both industries. This internal perception of brand coevolved with increasing consumer understanding of brand. For example, wholesalers described early symbol groups and cash and carries as 'fascias' and consumers called them 'names' whereas from inception SuperValu, Centra and Musgraves MarketPlace were generally understood as brands by wholesalers and customers. Interviewees active early in the timeline struggled to conceive brand beyond proprietary and own brand products. The P&T brand was not actively managed, Telecom Éireann created a name for Eircell, but Eircom created a brand for e-Mobile as was expected by stakeholders in 2010. This indicates that once a level of branding was achieved by one firm pressures to conform arose and it became normalized throughout the industry. Furthermore, once an industry became branded, brand quickly became a passport factor: to be seen as legitimate and mitigate perceptions of risk, a product or service needs a brand.

The ability or willingness of a firm to invest in brand determined the level of brand evolution they achieved and consequently some operated a lower level than more brand-orientated firms. The stage of brand evolution varied across the value chain with upstream or downstream firms being more evolved than the focal industry, a relationship that changed over time. Table 6-6 illustrates how the level of branding amongst thought leaders changed.

Brand Evolution	T_1	T_2	T_3	T_4
Wholesale Grocery				
Focal Industry	Proto	Basic	Augmented	Evolved
Suppliers	Basic	Augmented	Evolved	Evolved
Customers (B2B)	Proto	Basic	Augmented	Augmented
Telecoms				
Focal Industry	Proto	Basic	Augmented	Evolved
Suppliers	Basic (weak)	Basic	Evolved	Evolved
Customers (B2B)	Weak	Basic	Basic	Augmented
	Time →			

Table 6-6 Brand Evolution Across the Value Chain

The knowledge and capability to bring about brand evolution derived from outside the industries. Advertising, and later design and brand, agencies were the locus of this expertise, from whence brand experts like Jim Dunne and John Fanning diffused brand thinking. Step changes in brand thinking occurred when individuals were recruited from other industries or when learnings from other markets were introduced. For example, global brand teams from Vodafone and Three, or internationally based learnings in adjacent industries, such as Apple and Nokia in handsets. The

knowledge gap narrowed as indigenous expertise developed but remained a factor in each shift in the evolutionary trajectory. Evolved understanding of brand correlated with changing balance of power, changes in the industry architecture, and the organizational role of brands.

6.4.5 Brand Management

In the paragraphs below the increasing input of senior managers into brand management will be explored but it is important to state the inextricable link between brand management and marketing. Marketing remained the dominant locus of tactical brand management throughout these narratives with a significant input into strategic brand management. Marketing controlled or influenced brand research, measurement and reporting, brand design, management of marcoms' creativity and media, budget control and ongoing agency relationships. Corporate image, CSR and sponsorship may have been controlled by other parts of the organization but marketing was often involved in its communication and enactment. Yet neither marketing nor brand was cited as a core capability in either industry by interviewees. Furthermore marketing suffers poor reputation in some firms and only when the CEO was a brand advocate did this dynamic change.

Another critical observation emerging is the relationship between what brand does (its roles) and what brand management seeks to effect. For example, differentiation was described by interviewees as a business strategy with innovation, quality, pricing, customer care, and distribution technologies amongst differentiators cited. An early example of this was the move into self-service by VG and cash and carry wholesaling by Musgraves. These were part of a business strategy and the leadership was more concerned with the business model the brand represented than any inherent attributes of the brand. For interviewees, including marketing professionals, branding was a mechanism employed to realise differentiation strategies and brand and marcoms were couched in terms of competing, communicating, building market share and delivering tangible differentiators. Where a technology became generic, such as fixed voice telephony in the 21st Century, it was no longer seen as a differentiator and was often bundled with more compelling differentiators in brand building activities.

Increasing understanding of the strategic role of brand can be observed in the evolution of the locus of brand management. This is illustrated in Figure 6-4 with a model based on the company value chain. Early in their development the primary locus of brand management was marketing (Figure 6-4 (a)). Business strategy was separate to brand, brand management primarily tactical, the responsibility of marketing supported by advertising agencies in emerging voluntary group central offices or the marketing department of Telecom Éireann. The creation of products or propositions to target specific customer segments was a strategic issue but their naming and communication the preserve of marketing. Examples of this include the launch of Shoprite by IMD and the

proliferation of brands in Telecom Éireann in the 1980s and 1990s. However, corporate identity and reputation were separate and controlled by the CEO or a senior manager. The opening of Musgrave's Tramore Road facility in 1966 was treated as a corporate reputation building event and its planning was discussed by the company board. Michael Smurfit was involved in the creation of the Telecom Éireann corporate identity. The relationship with brand identity agencies was more intermittent than the relationship with advertising agencies. Whilst the locus of brand management evolved, reputation remained a senior management responsibility throughout.

The move to more augmented brands, although triggered by different factors, saw similar changes in both industries. Underpinning this was an increase in competitive pressures and a need to engage more proactively with consumers. In telecoms the advent of competition corresponded with the arrival of leaders who understood and engaged with brand while in wholesale grocery the impetus came from the need to differentiate and build new symbols and concept brands in operations with wider geographic footprints. Brand became a senior responsibility along with more overt focus on creating branded customer experiences (Figure 6-4 (b)). Senior control of brand architecture became overt, employer branding started to draw HR departments into the domain of brand to attract employees with complementary values to the firm.

Conceptions of brand continued to evolve with the arrival of brand orientated CEOs, recruitment of senior brand specialists, input of global brand teams or, in the case of Musgraves, the need to manage an international brand portfolio. Figure 6-4 (c) illustrates how the strategic management of brand became a senior management or corporate parent's responsibility. Global telcos mandated brand architecture and local telcos and wholesalers became increasingly strategic in determining the role of each brand in their architecture[9]. Consultants and global brand management interfaced with senior managers while marketing and internal branding advanced involving HR and internal communications. The backward facing role of the corporate brand into the channel meant procurement functions became cognisant of the power of brand and its management.

There is a difference between advanced use of the augmented brand concept and brand as an organizing principle as shown in Figure 6-4 (d). Here the management of brand is diffused between senior management and marketing, but brand becomes central to the management of the business and impacts throughout the organization. The philosophy it represents was evident in the approach to branding in Esat and Eircell, Musgraves implicitly had this philosophy towards their corporate brand but Chris Martin built on this to make brand explicit across each of their portfolio of trading brands. Vodafone, Eircom and Barry Group aspire towards this brand orientated model.

[9] The SPAR brand was always dictated by its international global headquarters.

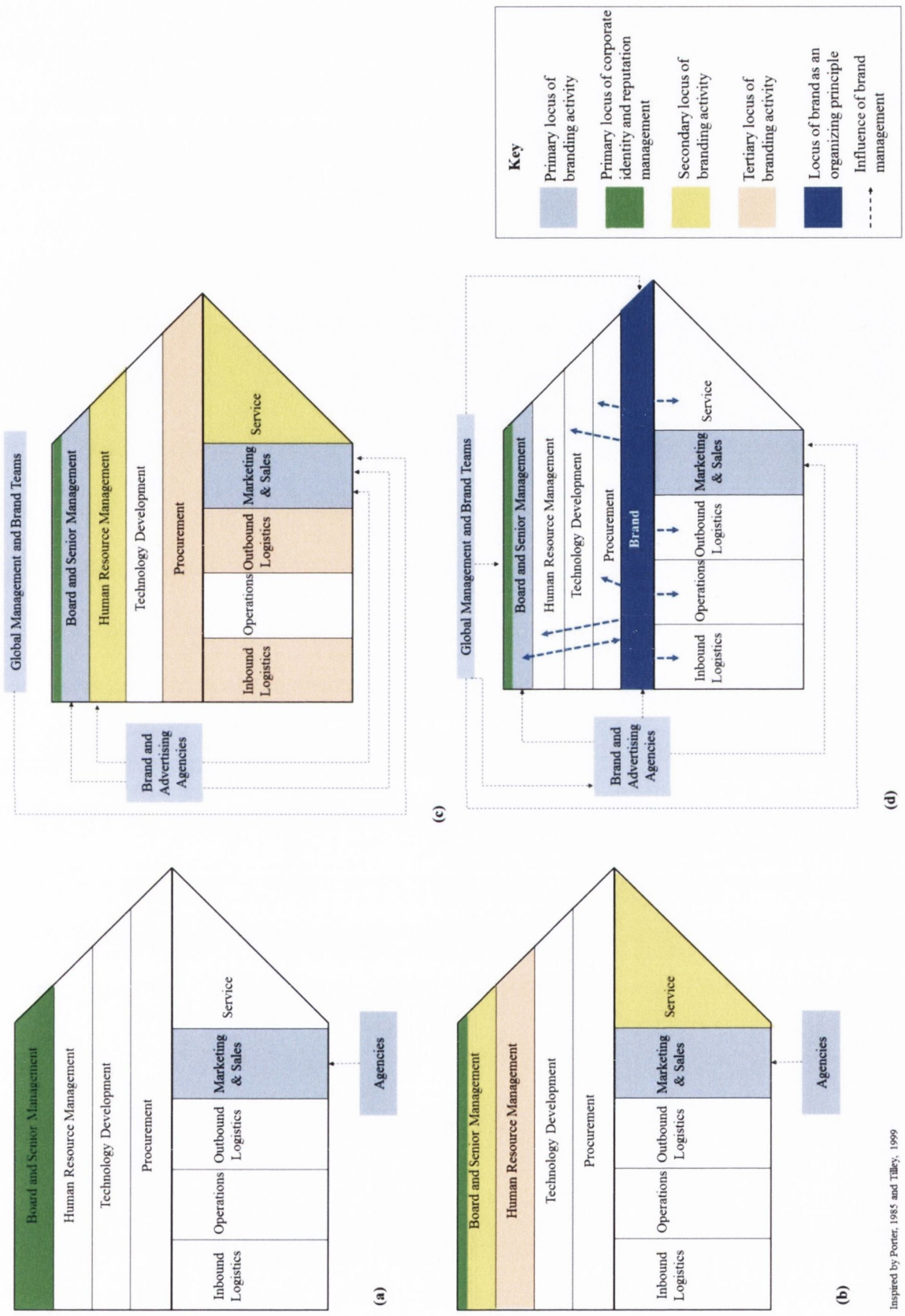


Figure 6-4 Locus of Brand Management[10]

[10] The inspiration for this figure is Catherine Tilley's (1999) adaptation of Porter's (1985) value chain framework.

There is evidence that at each stage most competitors did not match the leader's approach to brand management and whilst lack of resources played a role it appears predicated on corporate culture or management strategy. The coevolutionary dynamic between industry change and the brand capabilities of senior managers raises the question of whether it was industry change that brought about changes in brand and brand management, or whether it was leaders who understood brand who brought about industry change.

6.4.6 Brand Equity

Brand equity was cited as an important intangible asset but the nature of this asset was differentially understood and measured. Attributes measured to assess equity included: brand awareness; brand affinity; brand advocacy; market share; brand consideration; advertising awareness; brand loyalty; brand profitability. Qualitative and quantitative methods were used to capture data and the sophistication of these methods increased. External brand experts were important in encouraging the measurement of brand equity and in helping establish appropriate metrics. While acknowledging that brand equity measures the customer relationship with the brand and thus its importance in brand extension, market entry strategy, and the value of the firm, its actual nature was rarely explicitly stated. The exploration of the brand processes indicated the importance of brand equity in change, specifically in creating stakeholder dependencies and generating customer pull. This is consistent with the exploratory model which identifies the history of brand based activity as a driver of industry evolution. The role of brand equity appears central in understanding brand's role in industry evolution

6.5 AGENCY OF BRAND —BRAND PROCESSES

The within case analyses identified that the agency of brand manifested in seven brand processes. These were the consequences of branding and the role brands performed within the strategic management of firms. Table 6-7 introduces these processes and empirical examples from the case narratives. All these processes are embedded in context, involve people and change, and influence one or more levels of the value chain or inter-level dynamics.

Brand Process		Empirical Examples	
Descriptor	**Explanation**	**Wholesale Grocery**	**Telecoms**
Sense Making and Adaptation	Create value from innovation and mitigate resistance to change from routines.	Symbol group formats and contracts Cash and carry wholesaling Convenience retailers	Mobile telephony - pre & post-pay VoIP (eg Skype, Viber) Mobile data product launches Apple iPhone
Organizational Branding	Branding to influence culture and change to create a branded customer experience.	Internal branding programmes eg Musgraves (2004), Barry Group (around 2005) Reflecting organizational structure Standardization of retailer performance	Internal branding programmes eg Eircell (1996), Vodafone (2005), Eircom (2010) Reflecting organizational structure
Reducing Risk and Building Trust	Avoidance of risk key motivator for brand choice by B2B and B2C customers.	Pre-packaged goods in self-service Reinforcing local relationships Multi brand architectures	Switching to new telecoms supplier
Horizontal Brand Competition	Differentiate products that meet the same needs and grow market share.	Traditional brand wars Centra vs. SPAR Musgraves MarketPlace vs. Value Centre	Traditional brand wars Eircell vs. Esat Digifone Eircom vs. UPC
Vertical Brand Competition	Battle between brands within the same value chain.	Supplier brands vs. retailer brands Retailer vs. wholesaler brands	Handsets vs. MNOs Content providers vs. telcos
Facilitator of Expansion and Consolidation	Decision filter for merger, acquisition and growth strategies. Enabler of outcome.	Expansion of SuperValu in Leinster Consolidation of SPAR wholesalers Consolidation of Mangans and BWG	Vodafone's move into fixed line and broadband UPC into telephony and broadband MNOs into handset retailing
Architectural Alignment	Brand and brand management evolution in response to change in environment and industry architect.	Move to augmented branding in response to changing eating patterns	Acceleration of brand based activity subsequent to deregulation of telecoms

Table 6-7 Brand Processes—Agency of Brand

6.5.1 Sense Making and Adaptation Process

Sense making and adaptation addresses how brands help firms create value from technologies and innovations, helping them and their customers adapt to them. The interconnected process by which this occurs is explained using Figure 6-5. When a new technology, product or process innovation is introduced it may be of no value until it is productized. The invention may encounter barriers of comprehension by stakeholders including employees, distributors, customers and the media. Customers may not perceive a need for the product, see risk in adopting the technology, or feel the price demanded too high, whilst employees and distributors may not know how to sell it.

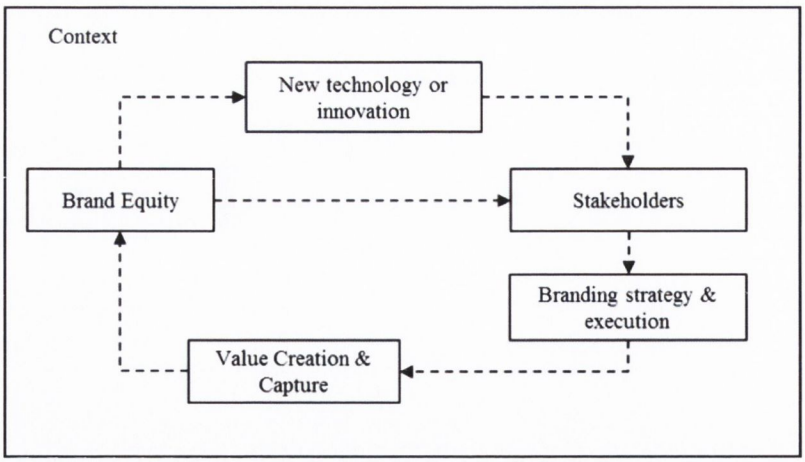


Figure 6-5 Sense Making and Adaptation Process

Brand helps overcome these barriers by creating a unique story for the innovation. Brand strategy determines where the innovation fits in the brand architecture, whether an existing brand story can be stretched or if a new story (brand) is required. For existing brands brand equity expedites positioning the innovation while for new brands branding creates reassurance and legitimacy, in both cases mitigating the risk of trial. Execution of either strategy requires marketing to create meaning and desire which can be amplified by the media and opinion leaders. This facilitates customer willingness to pay, which influences the value created and captured and thus profit and brand equity. This can then be leveraged to direct future innovation and to reinforce relationships.

This process occurs within a context which shapes the nature of innovative endeavours. For example demographic changes increased the number of smaller households creating an opportunity for convenience retailers for whom the wholesalers created brands. This same change highlighted the delay in fixed line telephone installation creating an opportunity for Eircell to extend their brand into consumer markets. Political pressure for competition and the awarding of a mobile licence to Esat Digifone accentuated Eircell's imperative to build their consumer base, precipitating the launch of Eircell Ready To Go. Changing eating patterns created demand for foodservice outlets, particularly QSRs, which was met by extending retail brands into foodservice.

Clusters of brands around a technology were sensed as a strategic group. Examples include cash and carries, symbol retailers, MNOs or ISPs. Strategic groups increasingly conformed to norms in branding innovation and brand architectures. For example, all telcos branded tariffs and symbol group brands clustered around community positionings. Changing strategic groups illustrate the dynamic nature of industry boundaries which formed and reformed in response to waves of innovation. In telecoms the rate at which physical technology evolved precipitated serial brand introductions. New entrants such as TCL and Esat Telecom required brands to build credibility and offset risk, a practice that became normalized and a barrier to entry for those with limited resources

to communicate innovation such as DigiWeb, Imagine and MVNOs. Figure 6-6 shows a representation of how brands came to symbolize different strategic groups in telecoms between 1983 and the late 1990s.

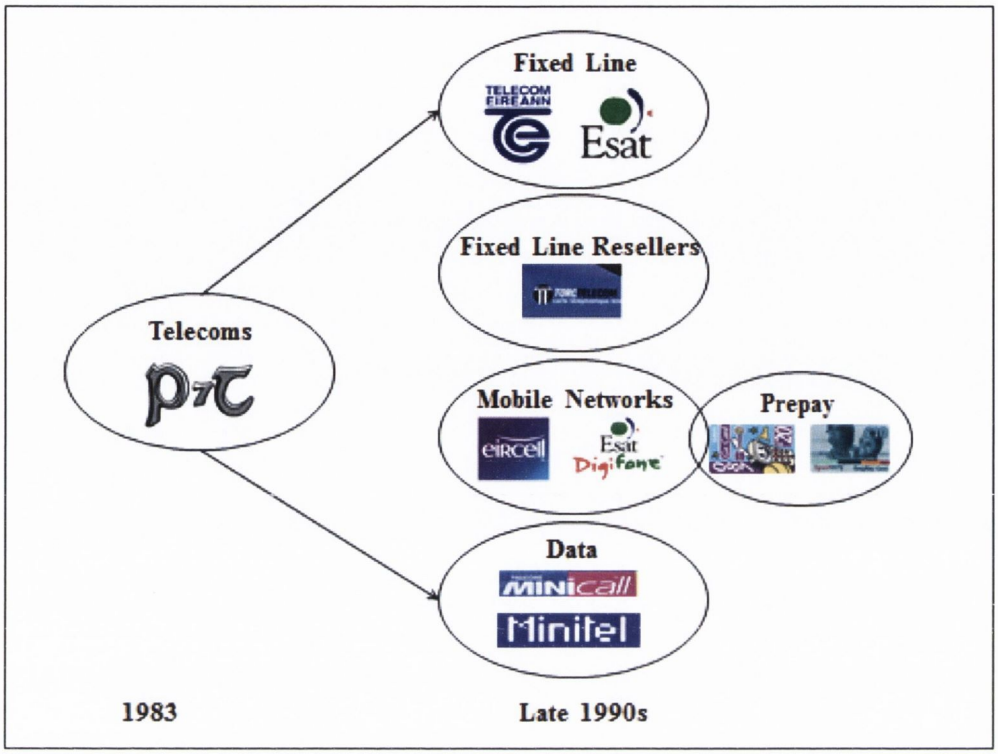


Figure 6-6 Emergence of Telecoms Strategic Groups in 1990s

Grocery symbol brands made supermarket and self-service technologies tangible and reflected innovations in retailing and merchandising practices. Symbols became recognised by consumers as a distinctive type of retailer, more progressive than traditional shops, whilst to independent retailers symbol brands signalled the corporate parent, particular types of trading contracts, and their power to attract consumer traffic. Thus sense making and adaptation might be seen to give meaning to new organizational forms emerging in response to industry change.

Sense making is particularly important for technologically complex innovations, for example mobile data. The PCMCIA card was launched as the Vodafone Mobile Connect Card to business users in 2003 delivering a user experience consistent with this promise. The functionality of the iPhone had a similar impact when it launched in 2008 while Skype demystified VoIP and along with brands such as UPC served as a substitute for fixed line brands. In these examples customer based brand equity was enhanced when the brand met customer needs better than competitors' brands facilitating future innovative activity. The frequency of transactions influenced the intensity of this process. In infrequent transactions, such as the choice of wholesaler partner by retailers or telecoms provider, the importance of the ongoing relationship and support that a brand represents is

important in the buying process. Frequent purchases are routine, only changing when there is adequate pressure to overcome inertia. Brand extensions reassure on routine purchases and form an emotional barrier to switching from one generation of a technology to the next. Thus well executed campaigns that make sense of technology leverages trust, and brands entering industries with a brand promise and equity acquired elsewhere can leverage this to make sense of their technologies in adjacent industries. For example, Apple was not the first smartphone in the market but their positioning and brand equity built in computing and music generated a sense of quality which the product delivered, shifting customers' determinant of quality towards handset suppliers.

6.5.2 Organizational Branding

Organizational branding influences employee behaviour to bring about customer related change. The data indicates some relationship between external brand architecture and organizational structure and that internal identity was important in building service brands. What is less evident is whether these initiatives had a sustainable impact on organizational change and whether this impacted industry structure or evolution. Determination of organizational structure was a business not brand related decision but the nature of each business unit and the market segment it served helped dictate the role and ascendancy of brand within it. For example, retail divisions of wholesalers were more brand-orientated than wholesale or foodservice divisions.

Strong relationships were observed between organizational identity, leadership, brand stories and brand values which, whether implicitly or explicitly understood helped determine behaviour and thus stakeholder perceptions of service brands. Some leaders attempted to build or change these values as seen under the leadership of O'Brien in Esat Digifone where the distinct culture was reflected in brand, or by Brewer in Eircell where external image and brand culture coevolved. Moreover Eircell values were resonant of Vodafone's brand values and the Irish leadership were inspired by the Vodafone story both facilitating integration and rebranding. This fit between brands was not ubiquitous following mergers and acquisitions and some resulted in cultural and brand tensions. Perlico's image was so unlike Vodafone's that the brand was discontinued to protect the Vodafone brand. Part of the strength of Meteor was a challenger mentality which clashed with the Eircom culture when operations merged. UPC built a new customer service culture before they replaced Chorus NTL with UPC. Evidence from wholesale grocery is less overt, but Musgrave's gently imposed their way of working on acquisitions and managed out employees who did not fit with their values.

Sometimes leaders encountered embedded cultures that were hard to change such as in Telecom Éireann / Eircom. Smurfit met resistance and despite Kane's attempt to launch core values the culture and resulting brand experience remained essentially unchanged. The Eircom rebrand was

perceived by Kane as another catalyst for change yet despite intervening changes in ownership and competitive context, Donovan faced similar barriers almost a decade later. He addressed this through structural change, establishing new divisions and integrating Meteor and Eircom and relaunching Eircom brand values through an internal branding programme. The resistance to change in Eircom is reflected in a brand image retaining elements of its P&T heritage.

Internal brand programmes were systematic initiatives to enable behavioural routines to be transmitted throughout the organization and improve efficiencies through mediating inter-departmental and business unit cooperation. In Musgraves Martin's brand-led approach included a co-ordinated approach to re-engaging aligned retailers and a more integrated approach to the management of the groups' business operations. Vodafone's programme was globally mandated with every part of the business being involved in becoming customer centric in an industry driven by technological change. Such was the power of the initiative that senior managers felt unable to speak out against it, despite cynicism from parts of the business. Musgrave managers offered no negative comment on their programme but some cautioned that it was a 'hot topic' and real behaviours and attitudes might not correspond with the proclaimed brand. Overall there was evidence that internal brand initiatives were most effective in times of rapid change or when divisional or company culture needed recalibrating but had little impact at other times.

6.5.3 Reducing Risk and Building Trust

The process of risk reduction is so elemental that it was rarely spontaneously mentioned in interviews except by brand experts; it is routine and expressed as building trust. Yet reduction of risk remained a constant motivator for brand choice in transactions and partnerships. For example, in grocery the investment in branding by manufacturers offset the risk of purchasing pre-packaged goods without shopkeeper advice, and the routine and repetitive nature of this transaction built trust in a self-service environment. This phenomenon is evident today where proprietary brands in high risk categories retain higher market shares than low risk categories, the most brand loyal grocery category in 2010 being oral analgesics[11]. Multiples used brands to reassure on quality whilst creating low price positionings. As consumers began to trust symbol brands the wholesalers could demand minimum standards from retailers, offsetting risks to the brand from underperforming retailers and simultaneously driving homogeneity across each brand. The house of brand strategy adopted across the industry protected brands from contamination by other brands in the portfolio, a phenomenon evident in the lack of damage to Musgrave's retail brands during the controversy surrounding the acquisition of Superquinn.

[11] In oral analgesics 97% of sales are attributed to the top five brands

Telecoms are a high involvement category and any risk to supply or quality is avoided. This created a powerful barrier switching from well established brands such as Telecom Éireann / Eircom or Eircell / Vodafone perceived as more reliable than emergent competition, a bias that remains evident today despite increased customer knowledge and more parity of service delivery. It explains why Tesco Mobile and Postfone communicated their MNO supplier as an ingredient brand to offset risk in switching and why, despite advertising and a strong price proposition, customers question the reliability of Imagine WiMax.

6.5.4 Horizontal Competition

Within both industries two types of brand competition happened concurrently. Horizontal brand competition was the basis of 'brand wars' with firms at the same level of the industry fighting for share, while vertical brand competition was the battle between brands at different levels of the value chain fighting to exert power on suppliers and customers. This section and the next reviews these processes and explicate their different impacts.

Horizontal competition is the struggle between products meeting the same rational customer need and is enacted at the level of the industry or strategic group. Differentiating products and services was generally the reason cited for advertising and marketing initiatives and acknowledged as imperative for gaining competitive advantage. These classic brand wars were evident in both cases, for example between SPAR, Mace, Gala and Centra in symbol stores or Eircom and other fixed line operators in telecoms. The relationship between supply and demand helped dictate the nature and strength of horizontal brand competition. Eircell and later Esat Digifone had surplus supply resulting in an intense brand war which attracted new consumers. This brand war continued as the brands within the industry changed and the arrival of Meteor and Three brought additional capacity into the industry. Excess supply was eventually sold to MVNOs fuelling competitive brand led activity. In wholesale grocery demand for symbols by independent retailers enabled the rapid roll out of competing brands but when supply exceeded demand wholesalers had to compete to attract new and retain the most valuable customers.

Most technical innovations were matched by competition creating incremental waves of competitive activity, often powerful enough to stretch industry boundaries. These waves were evident in telecoms such as the intense brand wars following fixed line deregulation or the ongoing brand war to build share in the converging voice and data paradigm. They were evident as distribution technologies emerged. The need to differentiate from or gain advantage over competitors precipitated changes in brand positioning or rebrands, sometimes requiring a new brand story. For example, repositioning of Meteor as a youth orientated value brand or the rebrand of VG to SuperValu and Centra (which itself became a part of Musgraves' brand story).

Horizontal competition accelerated the move into parallel industries such as ISP by telcos, or the increased presence of grocery wholesalers in foodservice. In each case the cumulative effect of brand's communications, along with technological effectiveness, made brands credible suppliers to the customer base. This highlights another critical dimension in horizontal wars which is that the relevant competitive landscape is how stakeholders decode it. Consumers do not see a battle between wholesalers and multiples; they see it between retail brands perceiving brand as a signal of common ownership. The Competition Authority likewise saw wholesalers as direct competitors to multiples because of their power and concentration. In telecoms this disparity in perceptions is less pronounced although brand's strength of positioning may be predicated on where it started rather than where it extended such as UPC in content or Vodafone in mobile. Eroding functional differentiation between brands increased the importance of emotional differentiators to sustain or grow share. For example, coverage and call quality advantage has eroded in mobile, especially legacy technologies, through network sharing and national roaming agreements, whilst modern wholesaling technologies and high levels of retail support have reduced the difference between directly competing wholesaler trading brands.

For effective competition each brand must receive marketing support adequate to the strategic group within which it competes. This should give advantage to the company with the most efficient brand architecture, but both industries generally conform to one architectural archetype moderating any advantage. In telecoms efficiencies are facilitated by the corporate brand architecture model, whilst in wholesale grocery the house of brands strategy requires that the corporate and each trading brand be supported. Therefore in each strategic group relative investment in marcoms expenditures is a critical determinant of the intensity and victors in brand wars. This is illustrated in Table 6-8 where the correlation between market share and media SOV is evident[12]. High overall levels of marketing increases customer category engagement making that level of the industry more salient and influencing the industry architecture but may also reduce profitability as postulated by Davy Stockbrokers with respect to Eircell in 1999.

Brands entering the industry leveraged brand equity built up elsewhere. For example, awareness of the Vodafone brand generated by spill in of UK media and sponsorship properties. Apple, Samsung and Sony were known brands before they entered the handset market and their launches were supported by marketing activities whereas earlier brand extension into handsets by Toshiba, Panasonic and Mitsubishi failed due to the lack of innovation or support relative to Nokia and Motorola. Tesco used associations with value for money to facilitate their move into telecoms.

[12] The apparently over-investment in media by symbols may be accounted for by the fact that for advertising to be effective it must deliver a threshold level of frequency and coverage of advertising.

Retailer Brands			MNO Brands		
	Share	SOV		Share	SOV
Tesco	27%	24%	Vodafone	40%	40%
Dunnes Stores	23%	19%	O_2	28%	29%
Lidl	6%	10%	Eircom[13]	20%	20%
Aldi	4%	6%	Three	9%	9%
Superquinn	6%	4%	OAO	3%	4%
SuperValu	20%	22%			
Other Symbols	5%	12%			

Table 6-8 Industry Market Shares and Share of Voice[14]

6.5.5 Vertical Brand Competition

What is specific to brand competition, and incremental to other forms of vertical competition, is the objective is winning the trust of the end consumer. Before exploring the brand element it is important to review the role of vertical competition itself. In 1960 branded manufacturers were usually larger than wholesalers, this enabled them to dictate trading terms and exert original power on wholesalers . The emergence of wholesaler buying groups and multiples enabled both to exert countervailing power on suppliers, a trend that continued until the chain of power reversed. From 1990 and accelerating in the 21st Century suppliers started to consolidate their distribution functions to exert countervailing power on wholesalers and multiples. Evidence of the success of this strategy was observed in Barry Group's inability to introduce centralised chilled distribution due to the power of brand distributors. The telecoms supply chain differed due to the presence of a monopoly controlling access customers until CPE was deregulated. Only with the growth of mobile phone retailers and the advent of powerful handset providers did countervailing power become important. The arrival of handset specialist and technology behemoths such as Nokia, Blackberry, Apple, Samsung and Google progressively tipped the balance of power towards the supply end of this value chain.

In vertical brand competition the relationship with the consumer is paramount. Consumers used brands as a proxy for trust. Such was this power in grocery that housewives would go to another retailer if their brand was unavailable. These proprietary brands behaved much as ingredient brands in industrial products being an integral branded component within the retail or wholesale product but remaining distinctive and unchanged throughout the channel. The power of brands as

[13] Market and SOV data is not available for the brands within Eircom's portfolio. Therefore the figures include Eircom's SOV and e-Mobile's market share. Industry insiders estimated Meteor to have 90% share of Eircom's mobile sales at that time.

[14] Source: Case narrative data. Retailer market shares 2010 and SOV 2007-2011, MNO market shares 2012 and SOV 2007-2012.

guarantors of quality made them valuable weapons in the battles between the multiples and wholesalers. Examples include the use of leading brands in price wars, the risk of delisting and the IADT boycott of brands. The price protection afforded by the 1987 Groceries Order enabled brand owners to maintain brand building activity but also enabled multiples and symbols to develop retail brand strategies, including own brand, without risk of a price disadvantage to competitors on proprietary brands. Post repeal of the Groceries Orders in 2006 the cumulative equity accrued in the retailer brands, the advent of recession and reduced investment in marketing capabilities by manufacturers consolidated retailers' position as the most powerful brands in the channel.

The use of the term 'partner' to describe wholesalers' relationship with aligned retailers is somewhat euphemistic. Retailers depend on the wholesaler for their buying power and marketing support to remain competitive and attract customer traffic. To avail of this they sign contracts committing them to purchasing a significant percentage of their product from the wholesaler and invest in brand specific artifacts and training. Whilst they can move to another wholesaler they have sunk costs in the existing brand including consumer and employee loyalty, and are dependent on a wholesaler to provide legitimacy and marketing support. Consumer visibility of brands within foodservice is limited but the quality of ingredients and service is paramount for B2B customers and are certified by wholesaler's corporate brands. The brand that serves as the guarantor of quality is the QSR, restaurant or catering outlet.

The vertical wars in telecoms followed a different trajectory. The brand consumers trusted most was the telco, a legacy of monopoly. Suppliers of fixed line handsets, the primary consumable, failed to generate brand customer pull. With the arrival of mobile telephony companies such as Motorola, Nokia and Siemens built consumer facing brands which became important ingredient brands in the MNO's retail propositions but large handset subsidies eroded profit margins. The tangibility of the handset compared to the network, and the emotional status of carrying the latest handset accentuated vertical brand competition. However, the real and perceived quality of the network and the ability of most MNOs to source desirable models from all brand suppliers enabled the telcos to remain the guarantor of quality. As the locus of competition moved to broadband and access to the Internet, the power shifted with iPhone identified as the brand tipping the balance of power. Customers demand for Apple enabled them to dictate how it was sold and provisioned. As smartphone brands competed vertical battles moved further upstream as mobile operating systems determined what apps and content were available. By 2012 Android handsets were outselling Apple. Consumer desire for differentiated content benefited telcos with a superior offering, particularly UPC, forcing telcos without superior content towards becoming the 'dumb pipe' down which content was delivered and of less interest to consumers. Figure 6-7 illustrates the types of brand decision faced by telecoms consumers as brands battle to become the guarantor of quality.

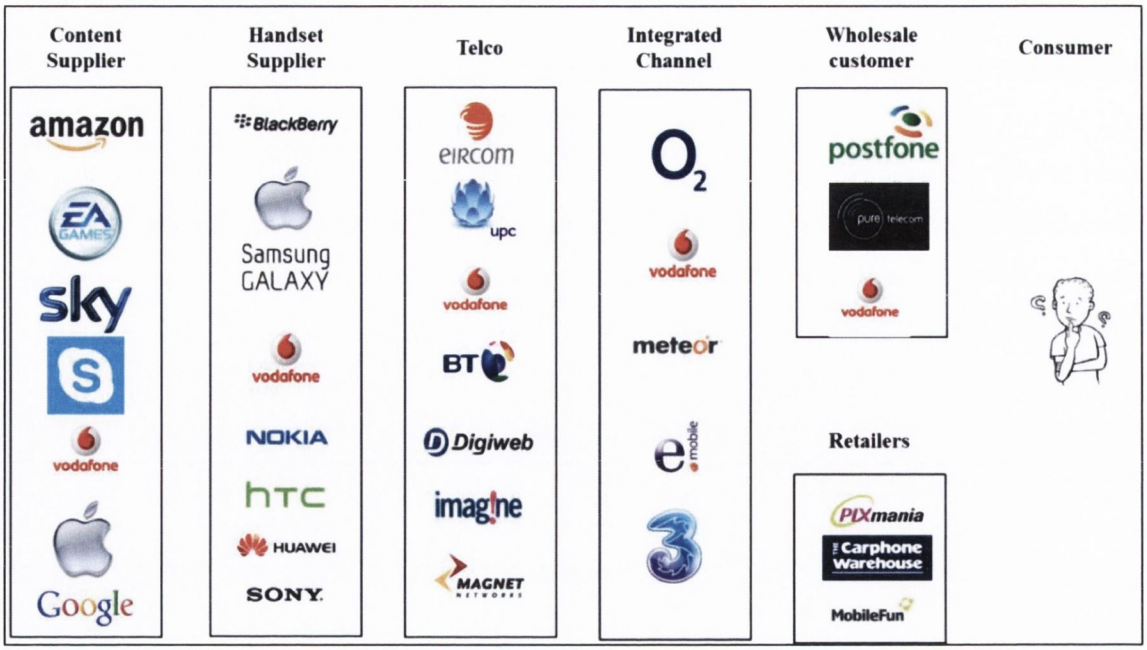


Figure 6-7 Vertical Brand Competition in Telecoms

The level of marketing support between levels is important. Brands supplied to the grocery distributors are diffused across many suppliers so advertising expenditure is typically less than the retailer brand plus retailers control the sales environment and point of purchase communications. Telcos spend more than their suppliers on marcoms but their marcoms often feature branded handsets to fulfil contractual obligations but mostly to make their service tangible and because these brands stimulate demand. Consumers move network if the handset they want is unavailable as was evidenced by the success experienced by O_2 when they had exclusivity on Blackberry and later the iPhone and the reversal when other MNOs acquired these brands. This reinforces the contention that supplier brands serve as ingredient brands within telecoms retail brand architecture.

A symbiotic relationship was observed to exist between brands managed at different levels of the supply chain. Supplier brands were ingredient brands in the downstream brand's architecture and essential components in its value creation process. The downstream brand was an essential part of the upstream brand's distribution channel and thus part of the overall brand experience. However, these brands competed to appropriate value. Strong vertical brand battles influenced industry boundaries by acting as a barrier to switching, pushing influence into another part of the value chain and building the strongest emotional bond with consumers. Moreover, brands fractured existing industry architectures by creating new bottlenecks and precipitating horizontal brand wars.

To summarise on brand competition, horizontal competition stretched the industry, helping it to grow and extend its boundaries, whilst vertical competition pushed brand's effect into other parts

of the value chain. Brands influenced industry evolution through an ongoing process of stretch and push, although one dimension may have been more dominant at a given time. Horizontal competition impacts on industry structure but has less impact on industry architecture whilst vertical competition has significant impact on industry architecture and consequently structure.

6.5.6 Facilitator of Expansion and Consolidation

This process illustrates how brand served as a decision filter for strategic choice and an enabling tool for company strategy. Its agency is concentrated at the interface between organizations and its effect evident when examining horizontal consolidation and vertical integration particularly with respect to intra-firm governance, merger and acquisition. Brand facilitates movement across industry boundaries, the formation of organizational forms and changes in channel competition. This process occurs within and impacts on the context, particularly with respect to political considerations on industry concentration and adequacy of competition. It is rooted in the company's strategic management and implementation of decisions to expand and consolidate.

Wholesalers saw symbol group retailing and cash and carry wholesaling as a way to protect their customer base, avoid disintermediation and create a more integrated approach to channel management. To facilitate this they formed strategic alliances with other wholesalers, creating a new organizational form with central offices and support structures. Buying groups acted as the base for the development of symbol retailers. They locked wholesalers into relationships with group members who became the locus for ongoing cycles of merger and acquisition as some expanded and others chose to leave the industry. For example: VG wholesalers were early targets for Musgrave's acquisition; SPAR wholesalers merged to form AWL and MUM to win the SPAR franchise forming the nucleus of BWG; AND was formed from Golden Goose and Mace and later merged with NWGA to form Stonehouse. BWG later acquired Mangans consolidating the Mace brand and optimising Value Centre.

Where brands did not fit with a changing environment or company strategy they were divested or discontinued. For example, political pressure caused the sale of Cablelink by Telecom Éireann. BT purchased Ocean from its strategic alliance partners and discontinued the brand following the acquisition of Esat Telecom. Changing industry dynamics saw the divestment of Musgrave Frozen Food when the growth of SuperValu made Musgraves an unacceptable distributor for multiples. Brands were sold to release capital to support other elements of the business, such as BWG's sale of its UK drinks business or Musgrave's sale of its non-core assets such as its hotel. However, most brands that disappeared following merger and acquisition were due to rebranding, such as UPC replacing NTL and Chorus, or efficiency as with BWG discontinuing the MNC brand. Each cycle of change saw stronger brands retained and weaker brands disappeared.

Brands within the firm's portfolio were an efficient guide for expansion strategies. For example, Musgraves steered their retail acquisition strategy around their brands. The SuperValu brand made the acquisition of L&N and H.Williams stores attractive and made alliances attractive to Roches and Pettits, enabling Musgraves to expand without acquisition. The Musgrave Cash and Carry brand was used for their expansion into NI and later the SuperValu brand gave them critical mass in the province. Similarly Musgraves chose not to buy a hardware chain in part due to the failure of their Ace Hardware venture and brand. Branding was a capability that Musgrave exported to its European subsidiaries. BWG acquired SPAR wholesaler Appleby Westward when they expanded into the UK. Wholesaler brand portfolios facilitated expansion of their influence into foodservice, forecourt and convenience retailing, further blurring traditional industry boundaries.

Examples from telecoms show a similar pattern albeit from a different starting point. As the market deregulated branding facilitated opportunities for expansion and later consolidation. Much of this brand expansion was foreign operators such as MCI Worldcom, Vodafone and BT seeing opportunity in Ireland and using brand equity as part of their entry strategy. The indigenous operators also used brand to facilitate expansion. The equity built up in mobile through Esat Digifone's marketing facilitated the launch of Esat Telecom. Both Eircell and Esat Digifone saw benefit in extending their brands into the retail channel acquiring independent phone retailers, although Vodafone and O_2 enacted this strategy. The 21st century witnessed a move towards brand consolidation. Many brands launched were acquired by other operators and most acquired brands discontinued. For example, Esat was replaced by BT, Perlico by Vodafone, MCI by Verizon, Clearwire by Imagine and Talk Talk by Digiweb.

Throughout the expansion and consolidation process brand strategies adjusted to the changing environment and brand portfolio. Thus the extant brand architecture is a reflection of this process at a single point in time as illustrated for key brands in the leading wholesale grocery companies in 2011 (Figure 6-8). The ability to create and leverage brand equity and expand the scope of brands enabled operations to capture increased value from the market which could be leveraged in future activities. A barrier to this strategy was loyalty of retailers to existing brands including Mace across Ireland and Londis in the UK.

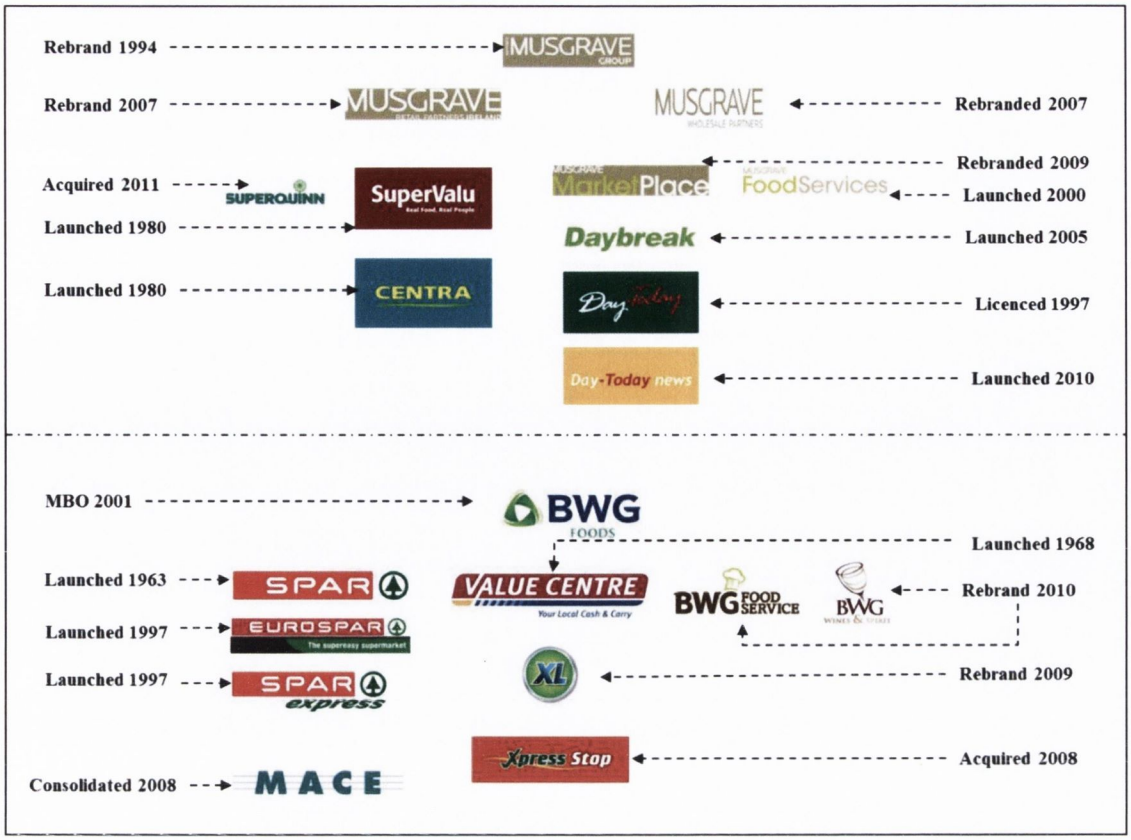


Figure 6-8 Trading Brand Architecture Wholesale Grocery

As industries evolved brands helped clarify industry boundaries especially when they blurred as a result of new technologies. This is illustrated in Figure 6-9 using the example of the convergence between the telecoms and broadcasting industries highlighting how brands meaning can evolve as they are used for strategic change.

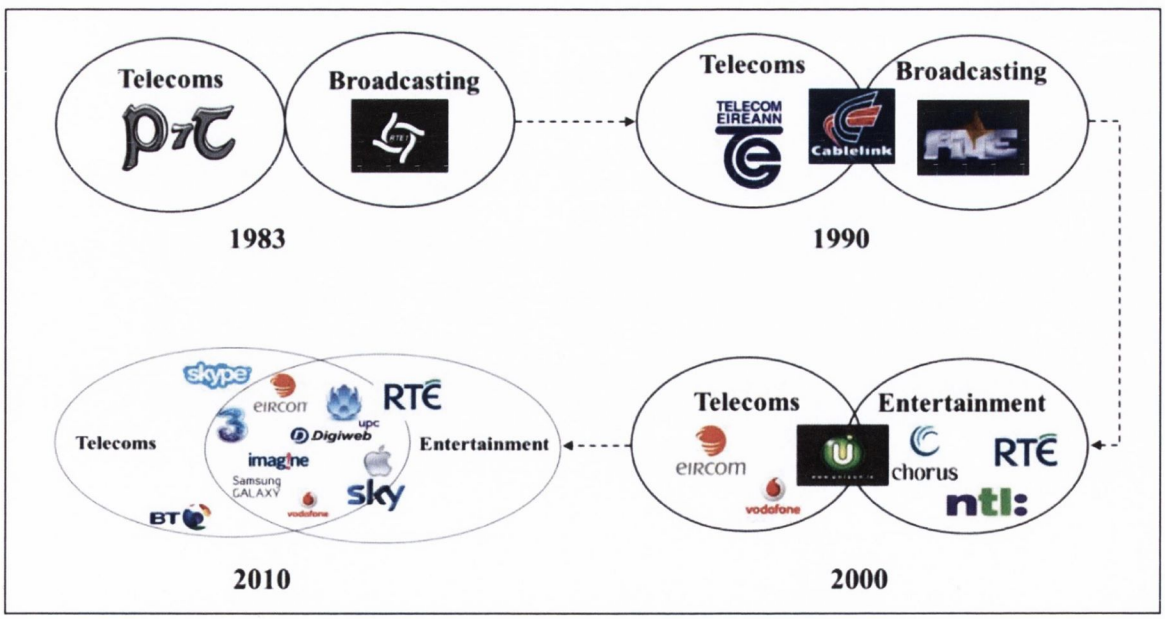


Figure 6-9 Telecoms Industry Convergence 1983 - 2010

The P&T and RTE were state monopolies in discrete industries but in 1986 legislation enabled cable companies to carry satellite services. Cablelink was formed through an amalgam of RTE's regional cable companies and Telecom Éireann eventually acquired 75% of the company as a vehicle for expansion. In 1999 Cablelink was sold to NTL. In 2000 a joint venture between INM and Chorus established Unison the first combined Internet, TV and telephony service setting a precedent for future market development. By 2010 the industries had effectively converged, facilitated by brand, with most brands operating in the overlap area.

This discussion indicates how brands play an important role in fragmenting a consolidated industry and consolidating a fragmented industry. In wholesale grocery the industry aligned around brands to move from fragmentation to consolidation. In telecoms brands helped fragment the market and then start to bring about consolidation. Brand acted as a decision filter and inter-organizational catalyst, created efficiencies, communicated change of ownership, new alliances and new types of business model thereby impacting on the intensity of both horizontal and vertical competition.

6.5.7 Architectural Alignment Process

Architectural alignment is the process by which brands and brand management help firms align themselves with changes in the environment, industry structure and architecture. It is the most tacit process but important in explaining the relationship between brand and the process of industry evolution. It appeared to be the process that catalysed the evolution of brands in the industry. Figure 6-10 helps explain this process.

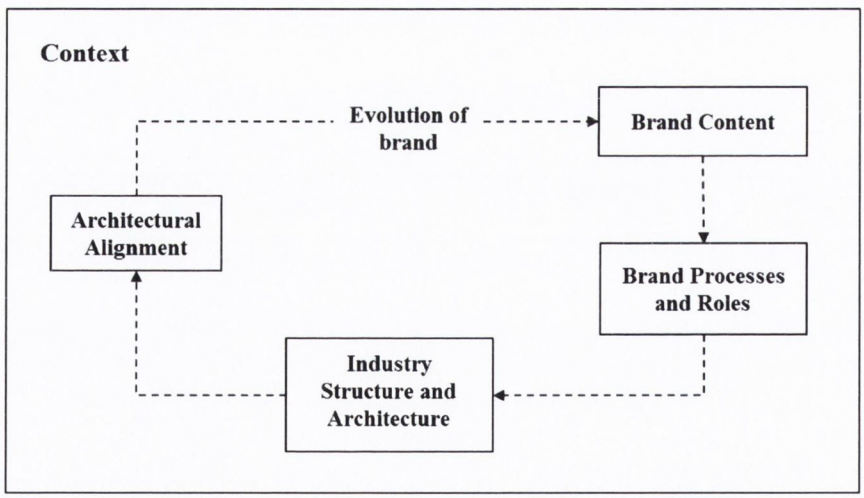


Figure 6-10 Architectural Alignment Process

Brand content (brand evolution and management) drives the other six processes and directs the strategic roles of brand influencing the industry structure and architecture and causing firms to adjust their approach to brand. The magnitude of this alignment depends on the extent to which

evolutionary forces disrupt the industry architecture. Where it remains relatively stable minor adjustments are made to brands through incremental augmentation but when significant forces conflux they undermine the architecture, requiring more radical changes in brand management and as a corollary the expansion in the roles of brands. Architectural alignment is the process by which firms realign with and leverage opportunities presented by the emerging structure.

Branding commenced as a result of multiple changes in context, where proto brands were insufficient for them to retain their position within the architecture. Architectural alignment resulted in the emergence of basic brands. The move from basic to augmented brand in wholesale grocery was triggered by changing social patterns, distribution technologies, industry concentration, changing power dynamics in the value chain plus political instability and economic downturn. In telecoms political concerns around the impact of high telecoms prices, the influence of the EC, international telecoms merger activity and the introduction of mobile competition catalysed change. The final stage from augmented to evolved brands was a response to social change, customer brand sophistication, and the influence of a hostile media. For wholesalers consolidation was a contributory factor in the repeal of the Groceries Orders while the growth of discounters, encroachment of multiples into convenience retailing and increased acceptance of own brand were also drivers of change. In telecoms convergence of technologies, commoditisation of voice and ubiquitous coverage of mobile networks eroded traditional differentiators between brands, while the desire for connectivity and media rich content created opportunity for smartphone brands and content rich telcos such as UPC. In both industries economic downturn accelerated the rate of this change.

Throughout the case narratives new brand knowledge with which to make architectural alignments was exogenous to the industries, primarily in advertising and brand agencies or through recruitment of personnel with superior brand-building abilities. Their effect was to diffuse brand innovation across industries and architectural alignment is an industry level process. Brand evolution arose from architectural alignment and similar patterns of evolution occurred across both cases with no stage being bypassed. However, the rate of change varied due to different contextual drivers, particularly the rate of change of technology. Contextual change resulted in a change in the industry's guarantor of quality generally emerging after a number of cycles (see Table 6-9). High intensity of architectural alignments was associated with shifts in industry boundaries and a shakeout of firms unable to make the requisite changes.

Brand Evolution	Proto	Basic	Augmented	Evolved	
Wholesale Grocery					
Period	- 1960	1960 - 1979	1980 - 2004	2004 -2007	2007 - 2011
Guarantor of Quality	Suppliers	Suppliers	Suppliers/ Retail	Retail / Suppliers	Retail
Telecoms					
Period	- 1983	1983 - 1994	1994 - 2005	2006 - 2007	2008-2012
Guarantor of Quality	Telco	Telco	Telco / Suppliers	Suppliers / Telco	Suppliers

Table 6-9 Change in Industry Guarantor of Quality

6.6 REFLECTIONS ON CROSS CASE ANALYSIS

The thematic analysis of the cases indicates that despite the fundamental differences of these industries brand played a part in their evolution. Brand may not be the primary drivers of industry evolution but their presence and agency played a substantial role in structural and architectural change. This was achieved by providing the mechanisms to adapt to environmental change, create value out of innovations, stretch organizational and industry boundaries and build architectural bottlenecks to appropriate value. Creating differentiated products and services represents only part of brand's agency; seven brand processes enable organizations to survive, adapt, compete and create stakeholder dependencies which accrue as brand equity. Brand agency is instigated by senior management or customer decisions and affected by individuals with requisite brand knowledge and capabilities. It transcends the boundaries of the value chain. The case analysis raises questions with respect to brand itself. As industries evolved they drove the process of brand evolution and is thus a construct able to affect an expanding range of strategic roles. But what is the nature of brand that enables it to do so? This will be addressed in the final chapter of this thesis which links the empirical data to the extant literature to explore conceptual and theoretical explanations for brand's multifarious agency and answer how they influence industry evolution.

CHAPTER 7 DISCUSSION AND CONCLUSIONS

7.1 INTRODUCTION

In this final chapter the threads of the thesis are drawn together to answer the questions and achieve the research goals. The central challenge is to explore how brands influence industry evolution thereby addressing the gulf between the empirical evidence of the agency of brand and its treatment in industry evolution and strategy research. The thematic analysis concluded that brands play a substantial role in industry evolution, their influence extending beyond the firms that own them, helping shape industry structures. It identified seven processes through which the agency of brand influences change but their underlying mechanisms were not exposed. A second (preliminary and definitional) question asked "what is the nature of brand and how does it evolve?" This study explores all types of brand allowing generalizations to be made about the nature of brand's agency and effect. Brands were seen to emerge and evolve in response to contextual change, have agency through stakeholders, facilitate organizational fit with the environment and value creation and capture. Yet its elemental nature remained elusive.

This chapter explicates the interaction between industry change and brand through linking the thematic analysis with extant knowledge and theory to uncover the causal mechanisms capable of producing the observed effects of brand (Sayer, 1992). Retroduction is employed to reveal these mechanisms requiring conceptual leaps to generate abstract ideas from the data (Klag & Langley, 2013). One of these leaps is the basis for uncovering the elemental nature of brand. As debates continue around the importance of demand-side factors in strategy scholarship (Porter, 1974; Priem, et al., 2012) the centrality of brand to this study explicitly acknowledges the importance of customers. Furthermore the importance of brand equity in creating customer dependencies is integral to brand's role in driving change. The study's longitudinal approach enables the agency of brand and its history (brand equity) to be studied over time as it mediates the interface between the rational world of production and the emotional world of consumption (Lury, 2004).

Pettigrew observed that *"changes have multiple causes and are to be explained more by loops than lines"* (1990:270). This quote is an apt description for the complex relationships between brand and industry evolution. While the underlying logic of the exploratory framework (Figure 2-7) is retained, critical realists see research as a process of conceptual improvement. Emerging themes should not be constrained by the scaffolding of the framework but should inform the analysis and outcome. Themes that emerged include the coevolutionary dynamic between industry and brand and the differential effects of brand on industry structure and architecture.

Following this introduction Section 7.2 addresses the seventh stage of the data analysis, determining the nature of brand. Conceptions of industry boundaries are central to understanding

brand's agency and a visible manifestation of change. This is where the discussion of how brand influences industry evolution begins (Section 7.3), clearly positioning the discussion in the domain of industry evolution. The chapter continues with conceptual and theoretical explanations of the influence of brand across multiple levels of analysis (Sections 7.4 to 7.7). Section 7.8 presents the contribution of this study to knowledge and its implications for theory and practice. Finally it outlines the limitations of this study and suggests implications for future research.

7.2 THE NATURE OF BRAND

The thematic analysis indicates that the agency of brand is affected through brand processes initiated by managers to deliver the company's strategy. The brand processes clarify what brand *does* but offers no singular explanation of what brand *is*, resonant of Korneberger's assertion that *"brand is not one thing but many"* (2010:30). Moreover brand evolved to encompass new forms of brand and new strategic roles consistent with de Chernatony (2009)'s observation that over time brand has meant different things to different people. These evolutions were triggered by contextual change. As this research unfolded it became apparent that the nature of brand was essential to explaining its influence on industry evolution, resulting in the hypothesis that brand *is* one thing that *does* many things viz there *is* an elemental nature to brand. In Chapter 2 it was deduced that brand can be considered an intangible asset, a barrier to entry, an organizing principle, the output of a process or an institution, each of which will be explored. It will then be proposed that gaps in these explanations can be addressed by conceiving brand as a social technology.

Brands are acknowledged as intangible assets which contribute to competitive advantage. The cases indicate that they serve as isolating mechanisms (Rumelt, 1984), are inimitable, non-substitutable and rare due to the path dependency of their development, while measurement of brand equity enabled firms to attribute value to brand. As such they are VRIN resources (Barney, 1991). Although brand equity is differentially understood and brand value rarely taken into consideration in accounting practices or during acquisitions these ambiguities are consistent with the indeterminate nature of 'valuable' in the RBV (Kraaijenbrink, et al., 2010). More problematic gaps in this explanation are delimitation, co-production and brand evolution. Firstly, the substance of other intangible assets (e.g. patents, trademarks, reputation) is precisely delimited unlike brand which is differentially defined. Secondly, other intangible assets need not be co-produced with customers as is essential in the relational nature of brand rather than brand name (e.g. Mosmans & van de Vorst, 1998). Finally, defining brand as an intangible asset does not explain how it evolved.

If the nature of brand is a barrier to entry, its presence should inhibit competitors entering the industry (Porter, 1980). Once branding commenced, e.g. Golden Goose in wholesale grocery and Telecom Éireann in telecoms, it quickly became a requisite of organizational legitimacy and the cost of creating a basic brand was not a barrier to entry. Cumulative investment in advertising and

marketing by all competitors created a defensible position by making it hard for new entrants to create an impression and overcome existing relationships. The strategic roles brand facilitates create barriers to entry. The question of negative equity where brand is a liability (Neal & Strauss, 2008) also challenges this explanation. For example, dislike of Telecom Éireann's brand in the 1990s or the 'toxicity' of Chorus' and NTL's brands. This explanation neither explains internal branding nor brand's innovation and boundary spanning abilities (King, 1973; Moon, 2010) as observed in the sense making and expansion and consolidation processes where it acts as a complementary technology.

Brands were defined by experts (e.g. Jim Dunne, Ciaran O'Reilly), contemporary interviewees (e.g. Chris Martin, Paul Donovan) and the literature (e.g. Kornberger, 2010) as an organizing or guiding principle or the integrating platform aligning production with consumption to create value. Here brand is an organizing capability (Madhok, 1996) similar to McKelvey's dominant competencies[1]. Brand management, strategy and tactics in both industries showed increasing evidence of brand's integrative role but there are gaps in the explanatory power of this characterization. It has weaknesses in explaining product or ingredient brands, under-states consumers' agency in co-producing brands, and fails to explain the strong institutional forces constraining the choice of brand architecture and normative approaches to branding.

The narratives showed how brands shaped industries' underlying structures and the ways actors connected, supporting the view that brands are an institution (e.g.Akerlof, 1970; Arvidsson, 2006b; Power & Hauge, 2008). Brand's ability to reduce risk, certifying quality and build customers' trust was accepted. Brands were important in legitimizing products, organizations or emerging industry segments (e.g. symbol group stores or new telcos) and once brands were established it was effectively impossible to compete without one. This demonstrates the presence of normative and mimetic isomorphism, while the role brands played in wholesalers' collective action in their struggle with manufacturers suggests coercive isomorphism may be relevant. The weaknesses of this definition are that it does not explain brand evolution or brand's agency in change.

Brand is a set of relationships between products and services in time (Lury, 2004) close to Poole's (2004) description of process theories, and has been described as the output of a process (Jung, 2003; Langlois, 2007). To describe brand as a process or output of a process adds little to understanding its purpose. However, brands were described by experts (John Fanning and Dara Neary) as stories surrounding products and every interview included examples of rich storytelling. For example, the story of Musgraves' meeting where the decision was made to replace VG with new brands was spontaneously related by six interviewees. Furthermore, brands have been described as storytelling (Kornberger, 2010) and stories as process theories (Pentland, 1999;

[1] McKelvey originally called these management technologies (1978, 1982)

Woodside, et al., 2008). Whilst brand as a story is compelling it fails to give insight into how it captures value or evolves. No single explanation captures all brand's agency or evolution. But together they form the basis for explaining why brand is a social technology.

7.2.1 Social Technology

Social institutions are how organizations get things done through the routines and techniques that make certain transactions easier and more attractive than others. Most branding is routine and its outcome is the transformation of commodities into objects of desire *to wit* brands. Branding techniques and routines orchestrate behavioural phenomena (above all trust) for human purpose and as such meet Arthur's (2009) definition of a social technology [2]. Moreover social institutions are linked to routinized social technologies (Nelson, 2005; Nelson & Sampat, 2001) which control the way people think and interact (Zhouying, 2005), facilitate economic development through cognition and creativity in production and marketing (Zhouying, 2002), ameliorate problems (Spender, 1989) and mediate transactions by reducing the uncertainty of achieving the desired outcome (Rogers, 1962/2003; Thompson, 1967). All these are intrinsic to the roles brand was seen to affect. To reinforce the hypothesis it is valuable to consider other activities categorised as social technologies. These include business planning, sales, management, marketing, advertising and PR. Social technologies relying on the phenomenon of trust include monetary systems, property rights, contracts and standards (Arthur, 2009; Langlois, 2003). Despite conceptual links to brand, the literature has not identified brand as a social technology. Appendix R gives an overview of the social technology literature.

Technologies evolve through combination, recursiveness and the reliance on the effects of natural phenomena (Arthur, 2009). Combination implies new technologies augment existing technologies through a process of assembly, each sub-set both a technology and part of the larger technology (i.e. recursive). Technologies evolve in a path dependent manner with part of the evolutionary process taking part in the mind (Dosi, 2010; Nelson, 2005). Variations are introduced through 'unforesighted' experimentation (Vincenti, 1994) the most promising being selected and then retained by the next generation. If brand is a social technology it must evolve in this way.

7.2.2 Brand as a Social Technology

Brand evolved with respect to the types of brand managed, the scope of brands' role, their value creating activities and the phenomena they exploited. Although the tables presented in the last chapter (Tables 6-1 and 6-3) suggest this happened in discrete stages in reality change was ongoing, becoming more extreme only when the stability of the institutional environment was

[2] As the use of the terms 'social' and 'soft' technology are to a large extent based on the orientation of the author the term social technology will encompass 'soft' and physical will encompass 'hard' technologies. 'Social technology' is an ambiguous term but in this thesis it is defined as patterned fashions of human behaviour which determine how an activity is done (e.g. Nelson, 2005; Nelson & Sampat, 2001; North, 1990; Sugden, 1989).

undermined[3]. The most important phenomenon orchestrated by brand is trust. Because basic human needs must be met before higher order needs can drive behaviours (Maslow, 1954) the basic risk reduction and certification of quality elements to brand must be perennially satisfied before higher order needs like status and esteem can be addressed. Combination was evident in how the scope of brand grew, combining elements of earlier iterations with technologies developed to fulfil tasks not previously associated with brand. For example, the management of organizational policies was integral to HR management, customer experience to marketing, and retailer performance to sales. These technologies were integrated into the internal brand. Likewise the antecedents of B2B branding were described in the research as industrial selling, relationship or key account management, the domain of sales management. Each constituent task was a sub-system within the new brand type demonstrating the recursiveness of brand. Overall brands evolved by combination, recursiveness and the reliance of the effects of natural phenomena.

Social technologies are path dependent and causally ambiguous (Nelson, 2005), traits displayed by brands. Brand's positioning impacted its ability to expand to meet different needs or address additional consumer segments. For example, Meteor was so strongly associated with youth that it could not stretch into the business segment. SPAR was associated with basket shopping and struggled to extend into supermarkets, particularly in Dublin, despite the use of the EuroSpar brand. Conversely Apple was associated with design and technology facilitating its move into smartphones. Physical and social technologies coevolve, generating problems the other must solve (Langlois, 2003). This is driven by the physical (or material asset)[4] which is easier to specify, maintain, replicate and experiment with (Nelson, 2005). The case evidence showed that brand frequently helped adaptation to new technologies or industry conditions and created challenges for physical technology and was used for experimentation, Eircell Ready to Go being an example of both. Eircell's management saw a risk to their core brand in targeting youth and to mitigate risk they created the Ready to Go sub-brand requiring new handsets and packaging (physical solutions). Eircell leveraged latent possibilities not only in the brand but also in the network (a physical asset) in a creative and flexible way—a hallmark of a social technology (Dron, Reiners, & Gregory, 2011). Eircell's e-Merge illustrates where brand created a problem that physical technology was unable to overcome, its shortcomings not meeting expectations created by brand.

Social technologies dictate the division of labour in organizations and economic activity (McKelvey, 1982; Nelson & Sampat, 2001) influencing the emergence of organizational forms (e.g. branded symbol groups) and industry architecture. They help diffuse innovations across and within industries nationally and internationally, brands' storytelling ability mitigating

[3] The within case chronological analyses (Appendices P and Q) show more granularity in how this change unfolded.

[4] The term material asset is used to describe not only physical technologies but the artifacts they produce, services and distribution technologies.

environmental conditions (McKelvey, 1978; Woodside, et al., 2008) and building legitimacy with stakeholders (Lounsbury & Glynn, 2001). Brand enables technology transfer by reframing new technologies into a language accessible to employees and customers (Leonard-Barton, 1988) serving as sensemaking (Weick, 1979) and sensegiving (Gioia & Chittipeddi, 1991) heuristics. Social technologies are hard to standardize (Zhouying, 2005) but brand requires a consistent experience (Kapferer, 2008). The use of training, design and 'store of the year' programmes illustrate how symbol and telecoms retailers addressed this paradox, as does own brand quality control and internal branding. Finally, management implementation of social technologies varies in effectiveness (Nelson, 2005), and heterogeneity of brand knowledge and branding skills influenced firms' ability to create and sustain competitive advantage.

As a technology brands should evolve through variation, selection and retention (VSR). The architectural alignment process described how managers continuously aligned their brand with environmental change through minor adjustments, as in brand relaunches or extensions, or major adjustments when incremental phenomena were added to brand. Brand management introduced variations which were differentially selected and transmitted to the next generation, consistent with Kapferer's (2008) observation that brand acts as a genetic programme. Finally, social technologies and brands resolve problems through routines, process rules, institutions, products and services (Nelson & Sampat, 2001) and are thus a source of inertia, legitimacy and change.

7.2.3 Phenomena and Brand Metrics

Metrics used to measure brands include awareness, loyalty, product association, preference, propensity to change, satisfaction and advocacy[5], all behavioural phenomena driven by emotions marcoms exploit (Franzen & Bouwman, 2001). For example fear of the unknown is an emotion and trust the phenomenon that surmounts it. What differentiates a proto brand from a commodity is that it orchestrates trust to overcome fear allowing the consumer to feel safe. Other phenomena orchestrated for use in this research included: loyalty; inertia; preference; bias; ethnocentricity; willingness to pay. Contentment is an emotion which reduces propensity to change (inertia) which might be measured as brand loyalty. Inertia is not a motivator or emotion but a phenomenon that can be orchestrated such as in 'loyalty' programmes[6]. Finally phenomena are differentially important depending on the prevailing social and economic environment. For example ethnocentricity was exploited in the 1980s through the Guaranteed Irish brand.

7.2.4 Redefining Brand

The definition of brand used in this research — *"a cluster of values that enables a promise to be made about a unique and welcomed experience"* (de Chernatony, 2009:104) — fails to encapsulate

[5] These metrics are examples of those given by interviewees in both industries and by the brand experts.
[6] Lack of consumer research means assumptions are made in this section.

all brand was seen to affect. This is particularly evident with regard to its roles in vertical brand competition and merger and acquisition activity; in other words brand's roles in managing power or acting as a strategic filter. Brands result from the augmentation of commodities with values and associations (Danesi, 2006), associations being relations resulting from interaction or dependence. Another challenge to de Chernatony's definition is that some values or associations may not be *'welcome'* i.e. where brand equity is negative or where they signal a loss of power. As brands exist not only in the minds of existing customers but all potential customers or stakeholders any definition must include those who reject or do not welcome the experience it promises. Based on the evidence emerging from this study this author offers a new definition of brand namely that:

> *Brand is a system of values and associations which make some transactions and relationships more desirable than others.*

The justification for this definition is as follows. A social technology is a *"system of thoughts, practice and achievements that facilitate the achievement of specific aims"* (Bessant & Francis, 2005:98), the aim of a brand being to create and appropriate value for the owner. The brand system is a complex schema of values and associations signalling the rational and emotional attributes of products thereby creating difference. These schemata mediate interfaces of production and consumption across the value chain making individual transactions or ongoing relationships more or less economically, socially or psychologically advantageous to the customer. Branding is the process of creating, sustaining and augmenting these schemata facilitated by marketing activity and the intrinsic attractiveness of the products they complement.

This definition encompasses all types of brand from product to service, internal and corporate brands and the combinative effect of brand alliances. By including the term *"more desirable than others"* it acknowledges that desirability is a relative rather than an absolute dimension and that desires can be predicated on business as well as consumer objectives. Finally *"association"* and *"relationships"* underline the importance of dependence, power and the interaction between buyer and seller. Brand equity is the asset that results from these dependencies, accrued through branding activity, reflecting the durability of these schema and isolating the asset it complements from similar products. Ultimately it is these dependencies that create bottlenecks and architectural advantage thereby facilitating value appropriation.

7.2.5 Reflections on the Nature of Brand

This section answers the secondary question *'what is the nature of brand and how does it evolve?'* The characterization of brand as a social technology encompasses the explanations in the literature and addresses the gaps identified in each (see Table 7-1). Technology is often cited as a major driver of industry evolution but the influence of social technologies on industry level change is less well understood. Recognising brand as a social technology helps redefine brand and establishes a conceptual and theoretical basis for explaining brand's role in creating competitive advantage,

influence on the evolution of organizations, industry structure and architecture. Finally it suggests *how* brands evolve but not *why*, although as a technology it suggests the evolutionary mechanism is VSR. The influence of the environment on the evolution of brand will be discussed in Section 7.4.

Nature of Brand	Unexplained Gaps	How Brand as Social Technology Addresses Gap.
Intangible Asset	Delimitation	Organizing technology
	Co-production	Relationship
	Evolution	Evolves through combination
Barrier to Entry	Ubiquity	Distinct associations
	Liability	Relative desirability
	Organizational branding	Organizing technology
	Boundary spanning	Relational base for entry
Organizing Principle	Product brand	Distinct associations
	Ingredient brands	Existing schema
	Co-production	Relationships
	Institutional forces	Institution
Social Institution	Evolution	Evolves through combination
	Role in change	Mediating transactions
Output of a process	Purpose	Value creation & capture
	Evolution	Evolves through combination

Table 7-1 Brand as a Social Technology

7.3 INDUSTRY BOUNDARIES AND BRAND

With a clear definition of brand the discussion moves to answering the primary question "how do brands influence industry evolution?" Change was seen in both industries' boundaries (Section 6.4.1) and this section examines how brands influence the underlying nature of industry boundaries to affect change. The definition of industry is debated in the industry evolution literature (e.g. Christensen, 2011; Malerba & Orsenigo, 1996), assumed in the brand literature and presented challenges in analysing the data. Consequently the nature of industry boundaries is moot. Every interviewee articulated an understanding of their industry but none mentioned NACE codes or standard industry categories. Data collected by firms, service providers and regulatory bodies changed as technologies, industry structures and political priorities evolved. Examples include the fluidity of telecoms metrics collected by the ODTR and ComReg and the changing categorisation of wholesaler-owned supermarkets from symbols to multiples. Yet the consistency of individual descriptions at any point in time connotes the presence of shared schema suggesting industries are confined within cognitive boundaries. These structures are not hard, immutable and impervious to human agency (Sewell, 1992) but a duality between the agency of knowledgeable people and the schemata and resources that constitute structure (Giddens, 1979, 1984; Sewell, 1992).

Brands identify industry boundaries and provide a mechanism by which companies defend, extend and traverse them, helping distinguish emerging organizational forms and strategic groups and attributing firms to them. Boundaries are path dependent, building on existing associations between areas of economic activity and brands. Attribution of brands to industries is a collective

phenomenon with shared social meaning amongst customers and firms who define and position themselves relative to other groups within the value chain (Mathieu & Chen, 2011). This indicates that brands contribute to collective identities (Payne, 1990) which are shaped by and shape cognitive boundaries (Porac, et al., 2011). Moreover, boundaries continue to exist or change through perceptions which brands sustain and redraw. This conception of boundaries is consistent with the cognitive communities view of strategic groups and industries suggesting brands may be artifacts of cognitive communities helping disseminate industry belief systems (Porac & Thomas, 2002) through language, symbols and storytelling (Kornberger, 2010; Woodside, et al., 2008).

Brands influence boundary permeability through reinforcing, undermining or leveraging customer relationships. Through intra-industry brand processes boundaries become impermeable, acting as a barrier to entry while facilitating growth in overall market size. Conversely brands make boundaries porous by leveraging customer associations to enter adjacent levels of the value chain (e.g. telecoms into retail) and new industries (e.g. Tesco into telecoms). This is facilitated by brand's ability to: act as a boundary spanning device; diffuse innovations across heterogeneous customer groups; act as a survival mechanism when environmental change, rapid innovation and Schumpeterian creative destruction erodes boundaries and results in new types of competitor (Moore, 1996) such as multiple retailers or VoIP telephony. When vertical integration or substitute encroachment has occurred brands help to redraw industries' cognitive boundaries.

7.3.1 Four Boundaries of Industries

The concept of four industry boundaries draws on the work of Santos and Eisenhardt (2005, 2009) which identified four organizational boundaries (efficiency, power, competence and identity). These strike a chord with debates within the industry evolution literature. In particular they resonate with the efficiency-power debate, the importance of collective identity in boundary setting, and differences in capabilities across value chains. They complement research by Quinn and Leavy (2005) which identified efficiency, power and social legitimacy as the primary drivers of industry evolution[7]. They acknowledge the centrality of identity in choice of industry boundaries (Porac, et al., 1989, 2011; Williamson, 1994) and the importance of competence in industry architectures (Jacobides & Hitt, 2005). These boundaries are consistent with the theoretical framework and themes emerging from the cross case analysis. Therefore they form the basis for exploring brand's influence on industry boundaries.

The boundary of efficiency is the location of transactions. Brands mediate it by mitigating the risk of opportunism and building trust. Risk is a factor in transactions between individuals and between organizations, moderating firm's scope within the industry architecture (Jacobides, 2008). Brands

[7] Quinn and Leavy (2005) also identified a fourth driver, thymos (or spiritedness), arising from industry leaders. Brand influencers displayed some of this phenomenon, but it manifest through their ability to create and shape collective identities reflected in service brands.

lower transaction costs on routine and intermittent purchases through attenuating perceived risk and search costs. The boundary is stretched by efficiencies in scale and scope generated by horizontal competition and innovation. Effective brand architectures create efficiencies by optimizing growth strategies through branding and consolidation processes, maximizing marcoms investment across portfolios of products[8] within or across industry boundaries and leveraging brand equity, the history of past brand building activity (Aaker, 1991).

The boundary of power is the sphere of influence through which horizontal and vertical exchange relations are controlled. Relative power is fundamental to marketing channel management (Coughlan, et al., 2006) and vertical brand competition where the arbitrator of power is the consumer who chooses the brand (Duguid, 2003, 2010). Therefore brand's role in power is predicated on increasing customer dependencies. Through relational lock-in brands exert original and countervailing power across value chains, impacting on bargaining power, creating the architectural bottlenecks associated with 'must have' brands, thereby increasing value capture.

Competence focuses on how firms exploit and renew resource-based advantages including developing and orchestrating brands through differentiation, diversification and adaptation to the environment. Whilst branding was not described as such by interviewees, the data suggests that it bears hallmarks of core capabilities (Hamel & Prahalad, 1994; Leonard-Barton, 1992). Although brand knowledge was partially codified much was tacit (Polanyi, 1967) and routine (Nelson & Winter, 1982) especially early in both case narratives. Branding capabilities grew incrementally, initially in marketing before migrating towards senior management, much of this capability transferring into the industries through individuals with experience in other industries and markets. The limitation of this boundary is observed where firms attempted to extend their brands into domains where they lacked adequate competence. For example, Vodafone had limited success in monetizing mobile content due to their lack of competence in this domain.

The boundary of identity is demarcated by the dominant mind-set of managers, personal and collective identity being important. Consumer behaviour explains how individuals use products to affirm and project their identity (Reed, Forehand, Puntoni, & Warlop, 2012). Brands transform these products into personalities whose identities merge with consumers' (Danesi, 2006). Collective identity is defined by members of discreet groups (Payne, 1990), and collective identity determines the boundary of the industry *"irrespective of their technological, product or market similarities"* (Shearman & Burrell, 1987:327). This identity changes as shared understanding evolves. For example identity within wholesale grocery moved from 'grocery wholesaling to retailers' to 'wholesaling to businesses' with the advent of cash and carry. Telcos identity evolved from 'telephony and telegraphy' to 'media and communications'. Brands communicate industry

[8] The word product with respect to brand in this chapter includes services unless specifically stated.

identity and were used by interviewees to determine industry boundaries. Furthermore normative and mimetic isomorphism (DiMaggio & Powell, 1983) causes organizations to conform including how they present themselves to acquire social legitimacy (Meyer & Rowan, 1977), a symbolic value visible to outsiders (Scott, 2003) and a condition of identity (Lounsbury & Glynn, 2001).

The four boundaries operate across multiple interfaces of production and consumption, reinforcing the conception of brand as a boundary spanning device. Within a multi-level system each level is nested within higher levels of aggregation, all contained and constrained by the environment. Higher level phenomena strongly influence lower levels (Mathieu & Chen, 2011) so, for example, nationality and peer group are a high level of identity impacting on brand choice. The influence of external brand experts, located in the task environment, impacts the boundary of competence. Brand management is less likely to influence higher level boundaries except at times of fundamental change such as O'Brien and Brewer's influence on the emerging mobile industry.

7.3.2 Reflections on Brand and Industry Boundaries

Understanding boundaries is fundamental in exploring how industry evolves. Santos and Eisenhardt's (2005, 2009) four boundaries provide a basis for applying theory to the empirical data and exploring the mechanisms of change across multiple levels of analysis. The discussion of boundaries suggests that the theoretical framework outlined in Chapter 2 is appropriate to explaining brand's influence on industry evolution. The boundary of efficiency is explained by Transaction Cost Economics (TCE). Brands are a functional substitute for trust offsetting risks and attenuating search costs, while efficiencies created by brand help determine vertical scope. The boundary of power is explained by Resource Dependency Theory (RDT). Brand impacts on the balance of power between exchange partners and creates psychological customer dependencies which are the basis of brand equity. The boundary of competence is explained by Resource Based Theory (RBT). Unlike TCE and RDT which are boundary theories it is a firm level theory explaining how firms manage their brands resources and capabilities to achieve competitive advantage. Dynamic capabilities introduce evolutionary dimensions into RBT helping explain how this boundary evolves over time. The boundary of identity is explained by New Institutional Theory (NIT). The symbolism of brands forms a cultural-cognitive framework that aligns with the rules and norms of institutional environments giving legitimacy to organizations and a basis for stability and change. Efficiency and identity confer selective advantage whilst power and competencies infer adaptive properties. Finally, brand transcends boundaries mediating multiple production/consumption interfaces thereby influencing permeability and facilitating change.

7.4 THE INFLUENCE OF ENVIRONMENT ON BRAND

The thematic analysis suggests environmental change drives brand evolution and evolved brands help adaptation to ongoing industry change. By acknowledging that the boundaries of industries are partly determined by the shared schemata of industry actors and that cognitive, normative and regulative elements give solidity to social structures (Scott, 1995), industries can be conceived as existing within the institutional environment actors perceive themselves to populate. In addition to distinctions made in the industry evolution literature between institutional and task environments the brand literature suggests a second environmental dichotomy between the (rational) production and (emotional) consumption environments. These environments are the highest levels in parallel systems and exert significant influence on industries, organizations and individuals. This section introduces the concept of institutional fracture, explains why the environment triggers brand evolution and why disequilibrium between the environments of production and consumption is central to how brands and industries coevolve.

7.4.1 Why Brands Evolve?

Institutions influence industry evolution (Jacobides, 2008; Malerba & Orsenigo, 1996; Quinn & Murray, 2009) with changes in prevailing institutions arising from institutional jolts (Oliver, 1992), incremental change in power distribution (Mahoney & Thelen, 2010) and the legitimization of new institutional practices (Hinings, et al., 2004). Brand facilitates adaptation to the environment through the industry level process of architectural alignment. Institutional fracture occurs when forces for change undermine the existing industry architecture resulting in a battle for survival and power in a changed environment. To understand *why* brands evolve one final element of the evolutionary process must be considered, namely the role of people, producers and brand stakeholders, particularly customers. As brands are customer schemata they can only evolve in cooperation with customers. Furthermore, brand can only be exploited to cope with change when a producer appreciates that branding is 'normal science' (Kuhn, 1970) in their industry.

A paradigm shift occurred in the Industrial Revolution when transilience in production and consumption resulted in the emergence of product brands (Chandler, 1977, 1990; Kornberger, 2010). This framing of brand was embedded in managers' minds (Orlikowski & Gash, 1994) retarding brand's application to services. Over time the rules and routines of creating and consuming brands learned in one context were transferred to others enabling brand to be accepted and applied to B2B, service and corporate brands with brand sophistication coevolving with brand management practices (de Chernatony, 2009; Goodyear, 1996). Thus brands are intangible structures giving shape to social (and economic) life, enabling or constraining human action across time and space, evolving through producing and reproducing routines that reduce anxiety and create a sense of security (Giddens, 1984).

Figure 7-1 explains the coevolutionary mechanisms of brand evolution[9]. There are two environments: production and consumption. Variations (V) are introduced in the production environment, selected (S) in the consumption environment and retained (R) if they are transferred to the next generation of production. The interface between these environments is where the agency of brand is affected.

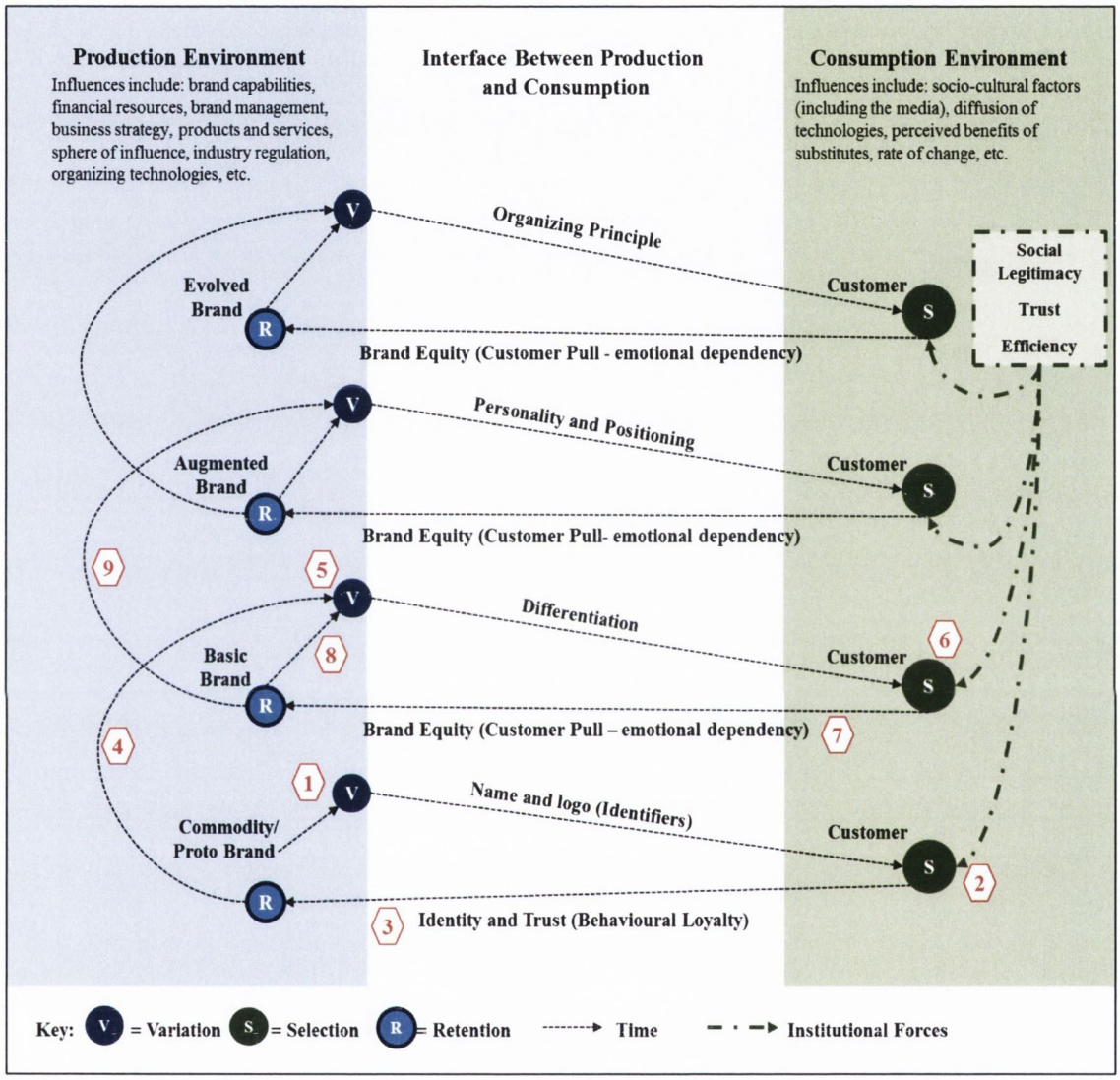


Figure 7-1 Why Brands Evolve

1. A commodity is a homogenous good sold freely as an article of commerce. The only examples of commodities observed in the case narratives were bulk or generic goods traded in grocers[10] or wholesaled telephony capacity. Proto brands identify products and signal provenance to customers thereby creating some 'use value' (Bowman & Ambrosini, 2000).

[9] This figure is inspired by and loosely based on Baum and Rao's (2004) Multi-level VSR model and Durand's (2006) Organizational Evolution and Strategy (OES) model.
[10] Even this is debatable as the provenance of these products may be known to the retailer and / or consumer.

2. Customers select them if they reduce risk and create purchasing efficiencies (TCE). The dominant logic is identity and customers continue to buy proto brands deemed legitimate (NIT).
3. This generates behavioural loyalty but minimal psychological dependency. Moreover this explains why brand creation can be initiated by customer action (Pennington & Ball, 2009) as trust in the proto brand creates a basis for differentiation.
4. Institutional fracture impacts either, but generally both, the production and consumption environments and the dominant logic moves to difference (Lash & Lury, 2007).
5. For producers it creates a need for differentiation, creating products more desirable to customers (RBT).
6. Customers select brands that mitigate risk, facilitate choice (TCE) and are consistent with their personal (or collective corporate) identity (NIT).
7. This generates brand equity, social and psychological dependencies (RDT) forming a strategic bridge from the brand's past to its future (Keller et al., 2008).
8. Dependencies on brands as risk reducers and differentiators are retained through incremental interactions between producer and consumer through ongoing architectural alignment.
9. During the next institutional fracture the process of VSR recommences and a higher level of branding emerges incorporating additional behavioural phenomena.

For each brand the process is path dependent, the values and associations emerging early in a brand's evolution and shaping its development. As the consumption environment is never entirely stable brands continually evolve to remain relevant to customers; failure to do so erodes brand equity, creating opportunities for better adapted brands.

The process outlined above explains brand evolution. Figure 7-2 illustrates how the process of brand evolution is linked to industry change, the brand processes and strategic roles brand performs further demonstrating the coevolution of industry and brand. T1 indicates a time during which the institutional environments and industry architecture are relatively stable. The extant brand content determines the intensity of the brand processes (excluding architectural alignment) and the scope of the strategic roles enacted by brand. These processes create evolutionary force on industry structure and architecture. Concurrently institutional forces create regulative, normative and cognitive pressures to conform (Scott, 2008). For example, certification of quality, common approaches to branding within the industry, levels of advertising activity and dominant brand architecture. Brand architectures that emerge may not be the most efficient but are perceived as legitimate. In this stable environment industry architectural alignment occurs through incremental first order change (Meyer, et al., 1990). Each variation augments brand management practices and brand's existing roles through combining additional phenomena. This manifests in activities like

brand extension and rebranding. If these variations result in improved efficiencies or competitive advantage they are copied by other firms and retained across the industry.

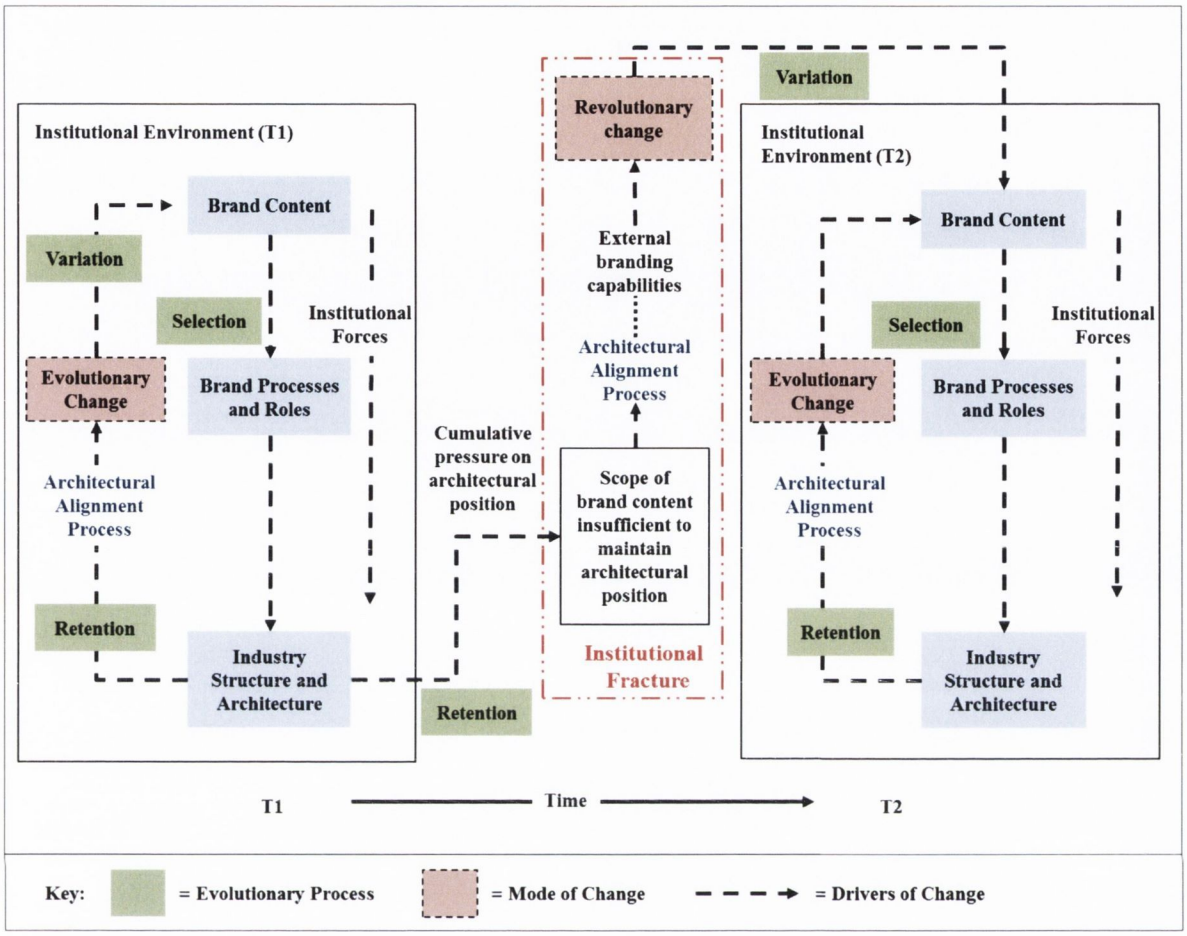


Figure 7-2 Institutional Fracture and Brand Evolution

Sometimes, despite successful variations being retained, cumulative pressure on the architectural position resulting from multiple drivers of industry change or an environmental jolt undermines the industry architecture and the scope of the brand content is insufficient to maintain architectural position. This is termed institutional fracture. For example, in both industries basic branding emerged as a response to change in the regulatory environment, demographics and the introduction of new technologies and competition. Institutional fracture triggers revolutionary second order change (Meyer, et al., 1990) arising from shifts in the balance of power and require firms to make significant changes to align to the emerging industry architecture. In the hiatus created by institutional fracture the analysis identified that new forms of brand were introduced and in almost every incidence the expertise for introducing variations were exogenous to the industry. These carriers of institutional change (Powell, 2008) include advertising and brand agencies, global parents or individuals recruited with brand experience. For example, between 1993 and 1995 telecoms saw the arrival of 'great individuals' (Poole, 2004) and brand-literate teams including: O'Brien and his team in Esat Telecom; Brewer in Eircell; Kane and managers transferred from

KPN and Telia in Telecom Éireann. Concurrently media activity amplified interest in telcos and their brands.

Revolutionary architectural alignment shifts one or more industry boundaries. Firms that cannot adapt are likely to fail or to lose market share while new entrants must match or supersede incumbents' level of brand content to succeed. By T2 variations deriving from institutional fracture have been selected into the institutional environments and the process re-starts. Appendix S outlines a staged example of this process illustrating how the interim stages in the chronological analysis contribute to change. The literature identifies that the collapse of institutions offers possibilities to brands in a re-emerging structure (Duguid, 2003, 2010; O'Cass & Ngo, 2007; Olins, 2003) but does not explain how. The process outlined above demonstrates that the intrinsic evolutionary potential of brands enables firms with dynamic branding capabilities to exploit fractures in industries' underlying architectures to survive, adapt and shift the balance of power.

7.4.2 Reflection on the Influence of Environment on Brand

The influence of the environment on brand is profound. Brands and brand management emerge and evolve in response to changes in the production and / or consumption environment through punctuated stages of revolutionary and evolutionary change (Gersick, 1991; Tushman & Romanelli, 1985). Variations are initiated by managers' prescient adaptation to disequilibrium between two systems, selected by customers to reconcile their economic and psychological needs with environmental change and retained by organizations when they confer competitive or architectural advantage. Finally it suggests that the dominant influence exerted by brand is power, the basis of brand equity and architectural advantage.

7.5 STRATEGY AND THE AGENCY OF BRAND

The literature identified twelve roles brand performs which were validated during the expert research (Appendix F). During industry-based interviews interviewees attributed these roles to business strategy confining top-of-mind brand associations to branding and marcoms. Yet the thematic analysis demonstrated brand was integral to multiple strategic initiatives that cannot be ascribed to either. This section explores the relationships between business strategy and the brand processes across multiple levels of analysis exposing each process's empirical and theoretical drivers of change and the industry boundaries impacted.

Branding builds and sustains schema that make products desirable relative to competing brands. It communicates quality and innovation to stakeholders over time, analogous to the process of diffusion (Rogers, 1962/2003). This increases willingness to pay by augmenting perceived benefits of innovation (Brandenburger & Stuart, 1996; Priem, 2007) and generating customer pull. Thus

branding is the foundation of brand equity which shapes subsequent brand related agency. The grounded approach to coding enabled brand processes to emerge from the data, names being ascribed based only on what brands did. In comparing the sense making and adaptation process to the literature it became clear that this process is branding, the process of transforming commodities into brands (Bergstrom, et al., 2002), and a necessary antecedent of the other brand processes.

The brand processes complement diverse business strategies. They are '*processes*' because they are a sequence of behavioural actions or activities occurring in a business system over time (Pettigrew, 1997; Poole, 2004) resulting in change at one or more levels of analysis. Table 7-2 explores the relationship between the strategic roles of brand and brand processes. The horizontal axis displays the strategic roles facilitated by brand and the vertical axis the brand processes. Only sense making and adaptation is important in delivering every role consistent with its categorisation as branding.

	Strategic Roles of Brand[11]											
Brand Processes	**1. Reduce perceived risk**	**2. Differentiate from competition**	**3. Communicate quality and value**	**4. Acts as an interface**	**5. Creates efficiencies**	**6. Shift balance of power**	**7. Generate and protect revenues**	**8. Build company reputation**	**9. Facilitate inter-firm activities**	**10. Legitimise corporate behaviours**	**11. Effect organizational culture to**	**12. Influence organizational processes**
Sense Making and Adaptation (Branding)	X	X	X	X	X	X	X	X	X	X	X	X
Organizational Branding		X						X		X	X	X
Reducing Risk and Building Trust	X	X	X	X		X	X	X	X	X		
Horizontal Competition		X	X	X	X		X					
Vertical Brand Competition				X		X	X		X			
Facilitator of Expansion and Consolidation	X				X	X	X		X	X	X	X
Architectural Alignment						X				X	X	X

Table 7-2 Strategic Roles of Brand and Brand Processes

[11] These are abbreviations for: 1 = Reduce perceived risk. 2 = Differentiate from competition. 3 = Communicate quality and value. 4 = Act as interface between firm and customer. 5 = Create efficiencies (economies of scale and scope). 6= Shift balance of power within value creation chain. 7 = Generate and protect future revenues. 8 = Assist growth and maintenance of company reputation. 9 = Facilitate inter-firm collaboration and cooperation. 10 = Legitimise corporate behaviour and activities. 11 = Effect organizational culture to deliver strategic vision. 12 = Influence organizational processes, policies and systems to facilitate performance and change.

What is apparent from Table 7-2 is that no process is sufficient to deliver any strategic role and each process contributes to four or more strategic roles. For example, the process of horizontal competition creates difference, enables the communication of quality and value and acts as an interface between the firm and its customer base. The inherent costs of brand wars encourages efficiencies in brand architecture to maximize brands' scope and scale and to act as a barrier to entry thereby protecting and generating future revenues.

The multiplicity of processes involved in delivering a business strategy can be demonstrated with respect to differentiation. To support a differentiation strategy brands need to reduce perceived risk and build customer trust. Branding ensures that a product or service's benefits are understood by internal and external stakeholders and organizational branding helps employees deliver these benefits. Finally horizontal competition communicates that it offers more value than competitive brands. Even complex rational differentiators offer only temporary advantage, sustainable differentiation required investment in marcoms to create unique stories around real differences. Brand alone is no substitute for meaningful differentiation as evidenced in the limited success of MVNOs or early symbol retailers.

Business strategies are predicated on the prevailing environmental and competitive context and this influences which brand processes are activated. For example, the power of suppliers of strong brands in grocery and the growing power of supermarkets created a strategic imperative for the wholesalers to redress the balance of power. Their strategic response was: cooperation through buying groups and subsequently to expand geographically and consolidate around their portfolio of brands (expansion and consolidation); reassure on quality through symbol group brands (reduce risk and build trust, communicate quality and value); exert backward pressure through own brand and the threat of delisting (vertical brand competition); drive innovation through brands (branding); and respond to changing industry dynamics (architectural alignment). Eircom was precluded from re-entering the mobile phone market following the sale of Eircell, restricting their ability to generate future revenues. Their strategic response was to acquire Meteor when this embargo ended. Their objective of creating efficiencies through bundling Meteor with Eircom was ruled anti-competitive by ComReg, and growth was constrained by Meteor's positioning. Eircom's strategic solution was to leverage the Eircom brand with B2B and high value consumers (reducing perceived risk) by launching e-Mobile (branding). This signalled a commitment to mobile enabling them to exert pressure on handset suppliers (vertical brand competition) thereby reducing the advantage of Vodafone and O_2 (horizontal competition). Overall Eircom increased their share of mobile revenues by 2% contributing to their growth strategy[12].

[12] In September 2012 industry turnover was €3.73bn of which 42% was from mobile revenues. Therefore a 2% increase in mobile share is estimated at €31.3 million.

Whereas the reduction of risk, horizontal competition and latterly organizational brand processes were part of the brand lexicon, the other processes were rarely articulated as the domain of brand. This could be for a number of reasons. Firstly, the brand processes contain significant levels of tacit knowledge (Polanyi, 1967) embedded in complexity reducing routines (Nelson & Winter, 1982). Secondly, brand processes are institutionalized rules (Nelson, 2005) as much about legitimacy as efficiency. Thirdly, as suggested by Weick (1987 cf Hatch, 1997) brand-based action preceded understanding but once it had been cognitively interpreted it became integral to future action. This was articulated by Musgraves' Hugh MacKeown who noted that "*...an awful lot of it was always done but it became explicit, it was absolutely focused on as being one of the pillars that would drive the business*". Fourthly, turnover of marketing management and historic lack of engagement by senior management in brand may have obscured processes which become evident through longitudinal analysis. Finally, some were unintended consequences of purposeful action (Merton, 1936) with subtle and delayed influences (Giddens, 1984; Williamson, 1994). Unintended consequences seem particularly salient with respect to vertical brand competition (a consequence of procurement) and architectural alignment (a consequence of strategic management responses to environmental change). This causal ambiguity for brand's agency underpins its categorisation as a VRIN asset (Barney, 1991).

7.5.1 The Mechanics and Drivers of Brand Processes

Having analysed what the brand processes do in the thematic analysis, the underlying mechanisms of each process are now explored. This enables the empirical drivers of change arising from brand-related agency to be linked to the theoretical drivers of change.

Sense Making and Adaptation (Branding)

The dominant mechanism driving industry change is branding's ability to create customer demand which generates psychological dependencies (brand equity) and willingness to pay. Demand is essential to the diffusion of innovation and value creation. For existing brands branding creates efficiencies by leveraging existing relationships to stretch the scope of the brand, providing a positional basis for growth, while trust facilitates trial of brand extensions and resistance to competitors' brands. However, brand strategies and tactics are constrained by normative pressures to conform to customer and industry conceptions of how brands should organise and behave. This last point is based on the empirical evidence despite the 'war stories' (Boje, 1991; O'Connor, 2002) of interviewees instrumental in branding. Brands retain distinct positionings, but over time industry level brand strategies become increasingly homogenous.

Organizational Branding

Intra-organizational branding enables behavioural routines to be transmitted throughout organizations to align with and enhance customers' brand image (Ind, 2007). Despite being

positioned as a facilitator of effectiveness, the data suggests its primary driver is soft power (Child, et al., 2012). Internal brand programmes build and communicate collective identities (Tarnovskaya & de Chernatony, 2011) generating differentiated customer experiences. But the cases showed equivocal evidence of its effectiveness. Firstly, there was evidence, particularly in Vodafone and Telecom Éireann, of coercive pressure. Not only was there scepticism by some senior managers (Ind, 2007) there was outright rejection of espoused values. Secondly, success depends on the priorities and attitudes of senior management especially the CEO (de Chernatony, et al., 2006) as evidenced in Vodafone and Musgraves. Thirdly, the clash of cultures following some mergers and acquisitions were too extreme to bridge the boundary of identity. Fourthly, programmes were most effective during rapid change such as revolution in Eircell in the run up to competition or re-construction in Musgraves precipitated by leadership change and the repeal of the Groceries Order (Balogun & Hope Hailey, 2008; 2002). These programmes were part of the re-orchestration of multiple resources to survive change (Augier & Teece, 2008) suggesting a link between organizational branding and architectural alignment, an industry level process.

Reducing Risk and Building Trust

Risk and trust are predicated on the psychological effects of threats of opportunism, complexity and uncertainty (Scott, 2008) suggesting that brands are chosen to alleviate risk and simplify choice. However, once brands were introduced into an industry they became essential to a firm's legitimacy inferring that efficiency was tempered by the need to conform. Trust is predicated on the confidence of both exchange parties (Barney & Hansen, 1994) particularly in situations of high perceived risk (Elliott & Yannopoulou, 2007). Thus the level of risk and the phenomenon of trust drive brand choice especially where decisions have long-term impact i.e. choosing a telco or wholesale partner. The process operates between a firm and an individual where brand serves as a risk reducing heuristic (Lynch & de Chernatony, 2004) and a defence against unintended consequences of change (Kahneman, 2012).

Horizontal Brand Competition

The dominant mechanic of horizontal competition is stretching industry boundaries by increasing the number of transactions thereby increasing efficiencies. Competition builds demand and barriers to entry creating value for all firms (Porter, 1980). Intensive brand competition makes the boundaries of a strategic group or industry concrete for customers and reinforces the industry's collective identity. The transformative agency of brand makes certain relationships more desirable and sustained marcoms activity reinforces purchasing routines creating dependency and inertia. Consumer demand arising from branding influences industries' performance and balance of power (Porter, 1974, 1976) stimulating vertical competition. Finally, to survive horizontal brand wars requires firms to have adequate financial resource to generate and sustain effective SOV.

Vertical Brand Competition

The dominant driver of vertical brand competition is exchange power arising out of the ability of brands to push their influence across the value chain. It relies on customer brand equity relative to brands within the new market space (Duguid, 2010; Porter, 1974, 1976). Through pushing its influence into adjoining levels and leveraging brand equity brand can reshape the architecture of an industry, create architectural bottlenecks and architectural advantage (Jacobides, et al., 2006; Jacobides & Winter, 2005), increase profit pools (Gadiesh & Gilbert, 1998) and capture incremental value. Notwithstanding the primacy of power driving this process, capabilities and transaction costs are important, coevolving along the chain of buy and sell transactions from supplier to customer (Jacobides & Winter, 2005). The brand must retain legitimacy across its expanded sphere of influence albeit that its entrance changes the identity of the industry stimulating normative isomorphism. Finally, vertical competition precipitates horizontal competition.

Facilitator of Expansion and Consolidation

The expansion and consolidation process produces stretch (efficiencies) and push (exchange power). Its influence is between firms at the same or adjacent levels of the value chain and its trigger is usually merger or acquisition. Horizontal consolidation creates efficiencies and can take the brand into new territories. For example Vodafone's acquisition of Perlico took the brand into fixed telephony and broadband. Vertical integration pushes brand's influence into an adjacent domain creating efficiencies through governance, for example the mobile network operators (MNOs) purchase of phone retailers. In each case the brand equity of the purchaser leverages the assets of the acquisition (Lambkin & Muzellec, 2010). Waves of consolidation and acquisition amongst wholesalers concentrated the industry, their corporate brand signalling growing power. With wholesaler-owned retailer brands channel members co-operated to expand the influence of the corporate brand through exploiting trading brands. Wholesalers serve as channel captains and customer trust in retail brands made them the guarantor of quality. The outcome of incremental consolidation can influence the environment raising questions of competitiveness amongst the legislators and the media. Finally, the use of brand as a decision filter in merger and acquisition activity suggests that branding is a dynamic capability enabling the organization to extend and modify its resource base and adapt to a changing environment (Ambrosini, et al., 2009; Helfat, et al., 2007:24; Teece, 2009) consistent with the role of a social technology[13].

Architectural Alignment

Architectural alignment is driven by the need for organizational populations to survive, conform or adapt to a changing environment. The cases showed branding meeting this objective including its use in developing organizational forms better suited to new environments (Hannan & Freeman,

[13] Dynamic capabilities are claimed to enhance, combine and reconfigure tangible and intangible assets of the firm to ensure they are technically and environmentally fit in the selection environment.

1989). Architectural alignment assists conformity to normative and coercive forces (DiMaggio & Powell, 1983) such as industry standards, regulation and legislation, collective action and architectural norms. It is probably an unintended consequence of strategic intent, the orchestration of brand assets and branding capabilities (Augier & Teece, 2008; Eisenhardt & Martin, 2000) again pointing to branding as a dynamic capability. It may be the unexplained process by which industry recipes adapt to changes in industry boundaries (Spender, 1989).

7.5.2 The Level of Brand Agency

In keeping with the multi-level nature of this study it is necessary to look at the agency of brand across the levels of the system in which it is nested (Mathieu & Chen, 2011). Table 7-3 summarises the influence of each brand process across all levels of the system, cognisant that it is a simplistic representation. For example, strategic groups might be represented as a sub-set of industry, and influences across non-adjacent groups are difficult to present. The horizontal axis represents the brand processes, and the vertical axis the level of influence. A cross indicates the process has agency at that level and the shaded cells are the primary locus of agency.

	Brand Process						
Level of Influence of Process	**Sense Making and Adaptation (Branding)**	**Organizational Branding**	**Reducing Risk and Building Trust**	**Horizontal Competition**	**Vertical Brand Competition**	**Facilitator of Expansion and Consolidation**	**Architectural Alignment**
Individual	x	x	x	x	x	x	x
Organization	x	x	x	x	x	x	x
Strategic Group	x	x	x	x	x	x	x
Industry	x	x	x	x	x	x	x
Value Chain	x		x		x	x	x
Environment	x				x	x	x

Table 7-3 Brand Processes Influence on Industry Hierarchy

The creation of brands starts with individuals, the one that initiates branding and the customer who creates the schema that emerge from this process albeit that this agency is triggered by environmental change. Therefore the emergence of branding in an industry is a bottom up phenomena (Kozlowski, et al., 2013) influencing higher levels of the system. This is consistent with the observation that brands emerge when industries are in a state of flux. Once industry architectures stabilise brands became essential to legitimacy and thus a top down phenomena impacting on organizations. The influence of proximal levels would be expected to be more influential than more distant levels (Mathieu & Chen, 2011) which are consistent with the enduring

relationship between customers and brand but less evident in Table 7-3. However, taking this into account the influence of each process is most intense across adjacent levels (shown by the shaded cells). In summary, brand's influence on change happens across different levels and managerial agency and intentionality is tempered by environmental effects. This is the hallmark of coevolution (Lewin & Volberda, 1999) indicating that adaptation and selection processes are involved across multiple levels of analysis (Murmann, 2013).

Brand's definition as a social technology and the coevolutionary nature of change infer that brand-related evolution occurs through the process of VSR. Building on the discussion so far Table 7-4 connects the mechanisms of change with the empirical drivers they manifested. It then aligns these with theoretical drivers of change and the boundary of the industry the mechanism impacts. Finally, it shows the relationship between each mechanic and the brand processes, represented by a cross in the grid. The shaded cells identify the dominant mechanic for each brand process and thus the strongest influencer(s) of change. For example, TCE explains how psychological concerns are attenuated by trust. RDT explains how customer pull arises from dependencies which increase bargaining power and influence owner's ability to create efficiencies from investment in horizontal competition (TCE). Brand's ability to help adaptation to a changing environment is a dynamic capability (RBT). NIT explains how customers identify with the social meaning of brand, legitimising their choice of brand. Finally, Population Ecology (PE) helps explain how brands facilitate organizational survival subsequent to environmental shocks or cumulative change[14].

7.5.3 Reflection on Strategy, Agency and Brand

This section illustrates the importance of brands in realising business strategy. The brand processes generate and are influenced by the underlying mechanisms of multiple boundary changes across multiple levels. These processes help organizations realign themselves to change and create dependencies which influences the process of industry evolution. Reviewing the mechanisms and empirical drivers of change it becomes evident that they are behavioural phenomena (e.g. demand, dependence, trust, inertia, etc.) orchestrated for human purpose, consistent with social technology. Stretch may appear anomalous but should be conceived as a combination of increasing transactions (efficiency), trust (reducing transaction costs), identity (social legitimacy), transformation (difference) and pull (dependence). Ongoing horizontal and vertical competition creates cycles of stretch and push (bargaining power) with institutional forces providing a mechanism for stability and conformity. This reconfirms that the organization theories best explaining brands influence on industry evolution are TCE, NIT, RBT and RDT. PE explains survival following environmental transilience but incidents of transilience were rare.

[14] Regulation of both markets impacted on the competitive environment enabling inefficient or sub-optimally adapted organizations to survive environmental change. This was most overt in the telecoms industry but also relevant to wholesale grocery. As a result, the explanatory power of Population Ecology is undermined.

Mechanism of change	Empirical Driver of Change	Theoretical Driver of Change	Boundary Impacted	Brand Process: Sense Making and Adaptation (Branding)	Organizational Branding	Reducing Risk and Building Trust	Horizontal Competition	Vertical Brand Competition	Facilitator of Expansion and Consolidation	Architectural Alignment
Stretch	Expand boundaries & market size	Efficiency (TCE)	Efficiency	x			x		x	
Trust	Reduction in perceived risk	Efficiency (TCE)	Efficiency	x		x		x		
Pull	Customer Demand - Emotional Dependence - Bias - Brand equity	Exchange Power (RDT)	Power	x			x	x		
Transformation	Difference through innovation and diversification	Competitive Advantage (RBT)	Competence	x	x		x	x	x	x
Identity	Collective identity	Social Legitimacy (NIT)	Identity		x	x			x	
Identity	Personal identity	Social Legitimacy (NIT)	Identity	x		x		x		
Push	Bargaining Power	Power (RDT)	Power					x	x	
Influence	Behavioural change and loyalty (soft power)	Power (RDT)	Power		x	x	x			
Conform	Industry norms	Social Legitimacy (NIT)	Identity	x				x		x
Conform	Coercive power	Legitimacy (NIT)	Power		x					x
Resist	Resist change from routines	Inertia (NIT)	Identity		x		x			
Survive	Survival of change	Critical Events (PE)	Competence		X					x

Table 7-4 Mechanisms, Drivers and Theories of Brand Agency

7.6 BRAND AND THE PROCESS OF INDUSTRY EVOLUTION

The final element in the exploratory framework is the process of industry evolution, specifically brand's influence on this process. Although the level of analysis is the industry the process of change unfolds within context at multiple levels of analysis (Pettigrew, 1987, 1990, 1997). With this in mind the exploration will start by introducing the evolutionary process by which brand influences the coevolution of the production and consumption environments. Building on this it will explore the influence of brand on organizational evolution, the level at which brand management is enacted. The discussion will then return to the level of the industry looking first at industry structure and then industry architecture. Finally the threads will be drawn together to answer how brand influences industry evolution.

7.6.1 The Coevolution of Production and Consumption

Brand influences industry evolution through its ability to mediate two interdependent systems; the rational world of production and the emotional world of consumption (Lury, 2004). Garud et al. (2013) describe three coevolutionary innovation processes; invention, development and implementation. Brands are an organizing technology that shapes these processes, particularly the latter two[15], complementing material assets that arise from the production environment and facilitating their fit within the consumption environment. Similarly brands enable the production environment to respond to changes in the consumption environment through innovation in product and marketing. Business problems and opportunities arise in the production (e.g. new technologies, products or marketing initiatives) or consumption (e.g. demographic, lifestyle, pricing challenges) environment. The outer context of production and consumption environments may be common or may be geographically separate. For example, iPhones are designed in the USA, produced in China, marketed globally and retailed and consumed in Ireland.

Using Figure 7-3 the mechanisms of brand's influence on industry evolution is outlined. Organizations in the production environment are heterogeneous in their resources and capabilities, and the consumption environment is populated with people heterogeneous in their identity, needs, and attitude to risk.

1. Invention and development processes (Garud, et al., 2013) give rise to variation in production and brand management initiate implementation processes to deliver the strategic goals of that innovation.
2. These are performed through the brand processes, initially branding and risk reduction, creating cognitive and perceptual differences in the consumption environment.

[15] Theoretically it can also shape invention but limited evidence of this was observed.

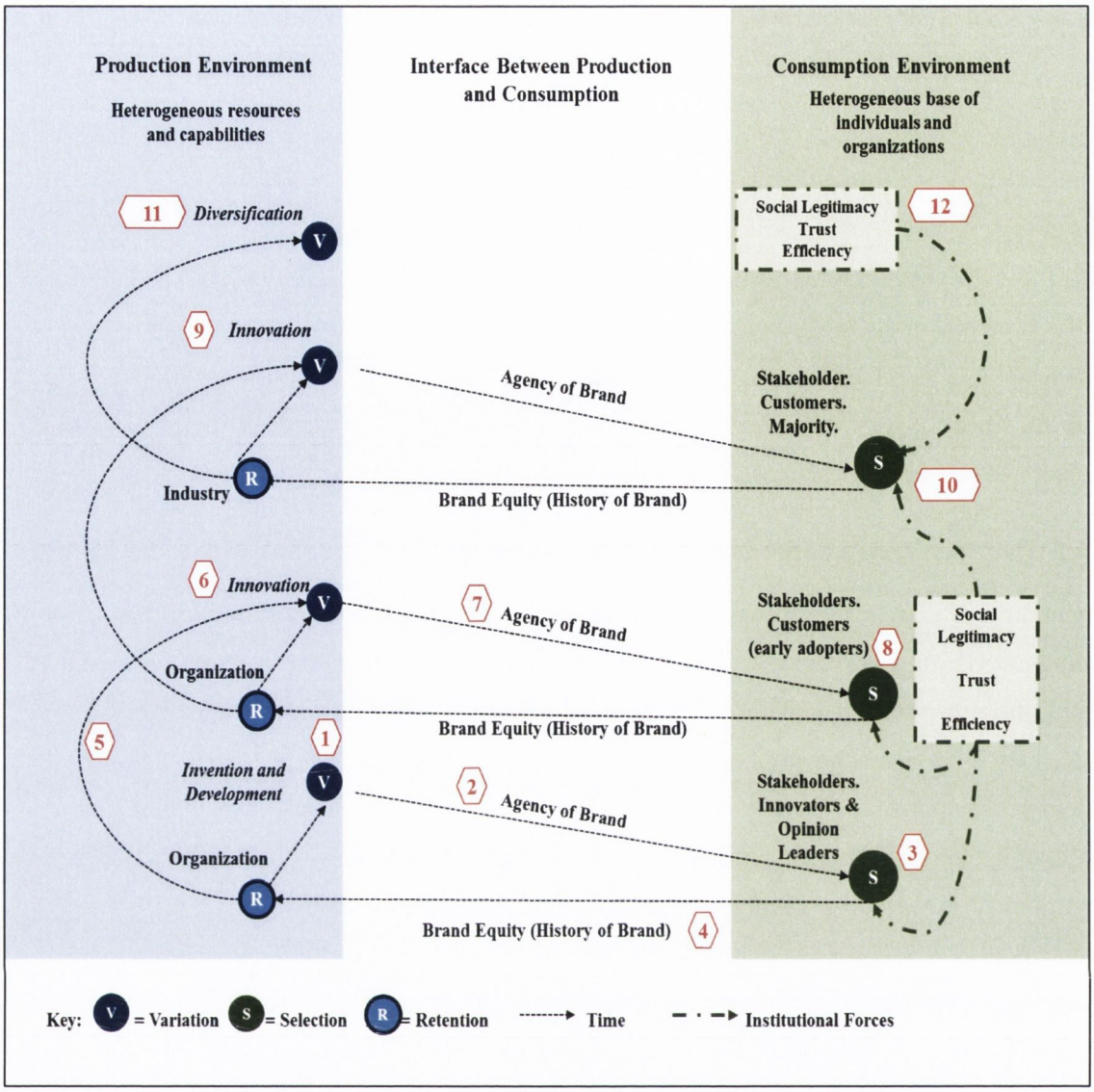


Figure 7-3 Coevolution of Production and Consumption

3. Stakeholders select brands which offer solutions to problems thereby making transactions or relationships desirable, offering efficiencies over existing solutions and complementing or enhancing identity. The earliest 'consumers' of a brand are likely to be opinion leaders and innovators, prepared to accept a higher level of risk. Moreover, because brands are co-produced, the schema of innovators and influencers modify the innovation to fit with their personal circumstances, analogous to reinvention in diffusion of innovation theory (Rogers, 1962/2003).
4. This generates brand equity, the value of customer dependency. It stabilizes the meaning of the brand, indicating how brand is co-produced and how…
5. … retained brand equity forms the basis of the next stage of implementation. Innovations are generally combinations of existing knowledge and incremental learning (Schumpeter, 1969 cf Kogut & Zander, 1992) and …

6. ...adaptations are made by brand management based on learnings from the consumption environment (e.g. market research) or to enlarge the territory of the brand. This may be through product modifications or marketing activities.
7. The agency of brand influences early adopters...
8. ...who adopt the innovation and contribute to brand equity and brand development.

This explanation started with a single organization and brand. In deregulated markets multiple organizations and brands compete.

9. Retained brand equity from innovation by individual brands stimulates incremental innovation triggering brand competition and changes in industry dynamics.
10. It stimulates horizontal competition and a battle for market share, determined by perceived benefits amongst a growing customer base. Brand equity may be captured as profit...
11. ...or used for diversification either within the same industry or new market spaces.
12. Similarly equity representing identity, trust and efficiency accrued in another industry serves as an entry mechanism into the focal industry.

Thus coevolution occurs not only across production and consumption but also across multiple levels of a value system.

7.6.2 The Influence of Brands on Organizations

Organizational evolution is shaped by a flow of events from the environment which they in turn influence. Brand's role in this duality (Giddens, 1979) should not be overstated; change would happen with or without brands and brand alone does not drive change. Firms invest in brands to create and capture value, initiate and respond to change and survive.

7.6.2.1 Survival

Brand provides a survival opportunity when the material assets they complement have intrinsic customer benefits but brand and organizational survival are different. Brands can survive when the firm that creates them disappears (Casson & da Silva Lopes, 2010; da Silva Lopes, 2007) the intangible asset being acquired and its appropriable value chased (Raggio & Leone, 2007, 2009) as in Digiweb's retention of the Smart Telecom brand. Firms are vulnerable during periods of institutional fracture unless brand equity can bridge the change. Where it does environmental turbulence can extend brand's lifespan (Grant, 1991). Similarly brands may not survive while the firms that create them do, for example, Musgraves discontinued VG believing it unable to adapt to changing shopping trends. Additionally branding knowledge and skills survive independently of organizations, individuals transferring it into other organizations.

7.6.2.2 Organizational Forms

Organizational forms emerge from entrepreneurial initiatives, opportunities in the resource space and competition amongst existing firms (Baum & Rao, 2004; Schumpeter, 1934). New forms identified in the narratives included: symbol retailers; multi-divisional wholesalers; integrated media and telecoms providers. Brands reduced obstacles to emergence, isolating them from parent populations and legitimizing them for customers and suppliers thereby extending the boundaries of identity and power. Where new forms were successful they were copied, brand being intrinsic to the replicated form [16]. Figure 7-4 uses symbol groups to illustrate how brands facilitate the emergence of organizational forms. The spatial nature of this process is important; the organizational form that is seen to emerge depends on the parent form, here it is the buying group. Symbol group retailing arose as a response to environmental change, this distribution format (material asset) being unknown to customers. Brand made symbol trading tangible and was selected by retailers when it created trading efficiencies. Specific symbol brands had to meet retailers' identity needs, determined in part by the degree of independence they would sacrifice for lower transaction costs. The benefits of symbol trading manifest as relational dependency. Buying groups and retailers co-produced the next stage of development by differentiating their symbol from competitors. The outcome was customers selecting a retail brand they trusted, making shopping efficient and reflecting their identity thereby creating brand equity.

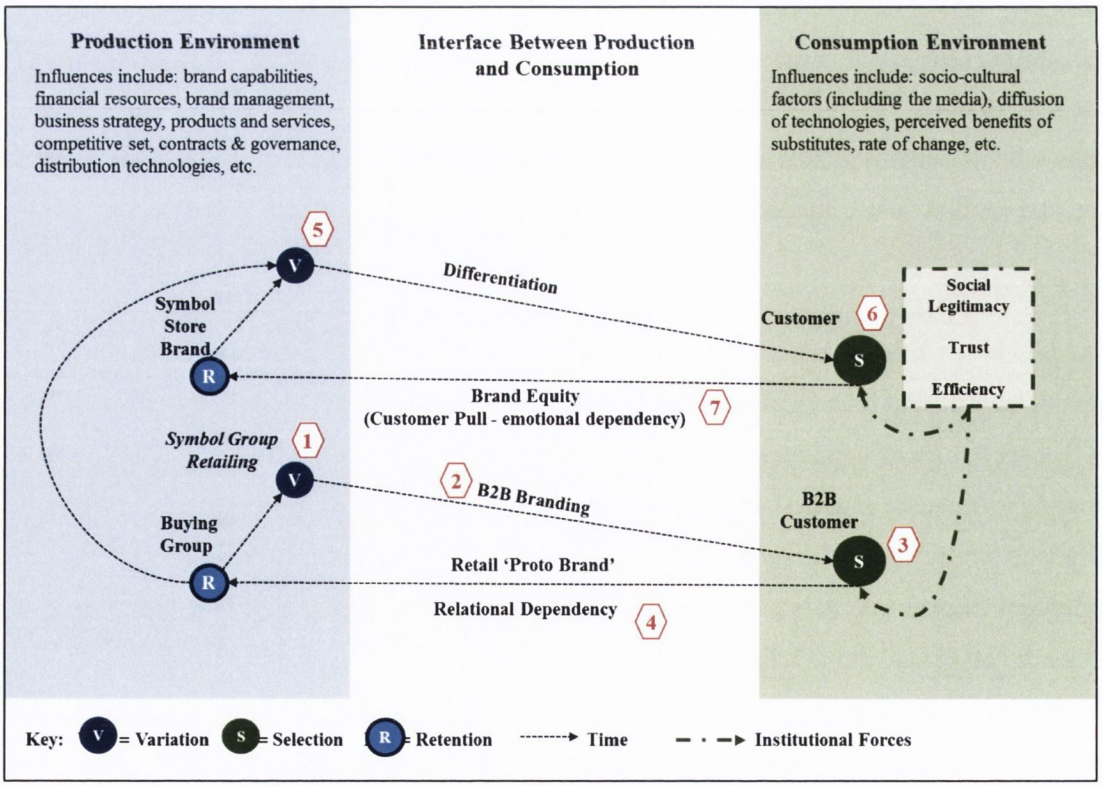


Figure 7-4 Emergence of Organizational Form

[16] For example, in the first seven years of symbol group trading approximately 38 symbol brands were created accounting for 63.4% share of wholesaler turnover. In 2010 there were over 20 symbol brands, reflecting the durability of the organizational form.

Brands help the organization of firms, brand architectures (also known as brand strategy) being fulcrums around which brand stretch is assessed, efficiencies in marketing exploited and competitive performance measured. However brand architectures are path dependent and constrain as well as facilitate choice. For example, BWG's decision to stay with SPAR constrained their ability to respond to industry evolution relative to Musgraves' decision to move to differentiated brands. Yet BWG used brand equity to enhance their position in forecourt retailing through the SPAR Express brand. Brand makes governance tangible and legitimate in emerging relationships such as the relationships between retailers and the wholesalers who own the brand. Relationship brands such as SuperValu and SPAR are different in the rights and obligations of both parties compared to wholesale brands such as DayToday or XL. The emergence of double- and triple-play telcos was largely achieved through merger and acquisition. This is indicative of another way that brands facilitate the emergence of organizational forms, through vertical and horizontal integration, or cooperation where brand alliances enhance consumption experiences (Priem, 2007). Tesco Mobile is owned by and communicates Tesco and O_2 while Postfone utilizes Vodafone as an ingredient brand to reduce consumers' perceived risk.

7.6.2.3 Culture and Capabilities

Theoretically organizational branding works as a two stage process as illustrated in Figure 7-5, first being selected by employees who 'consume' the brand which serves as a cultural glue (de Chernatony, 2006), modifies behaviours and creates variation in service delivery. This results in employees delivering a branded customer experience giving selective advantage in the consumption environment.

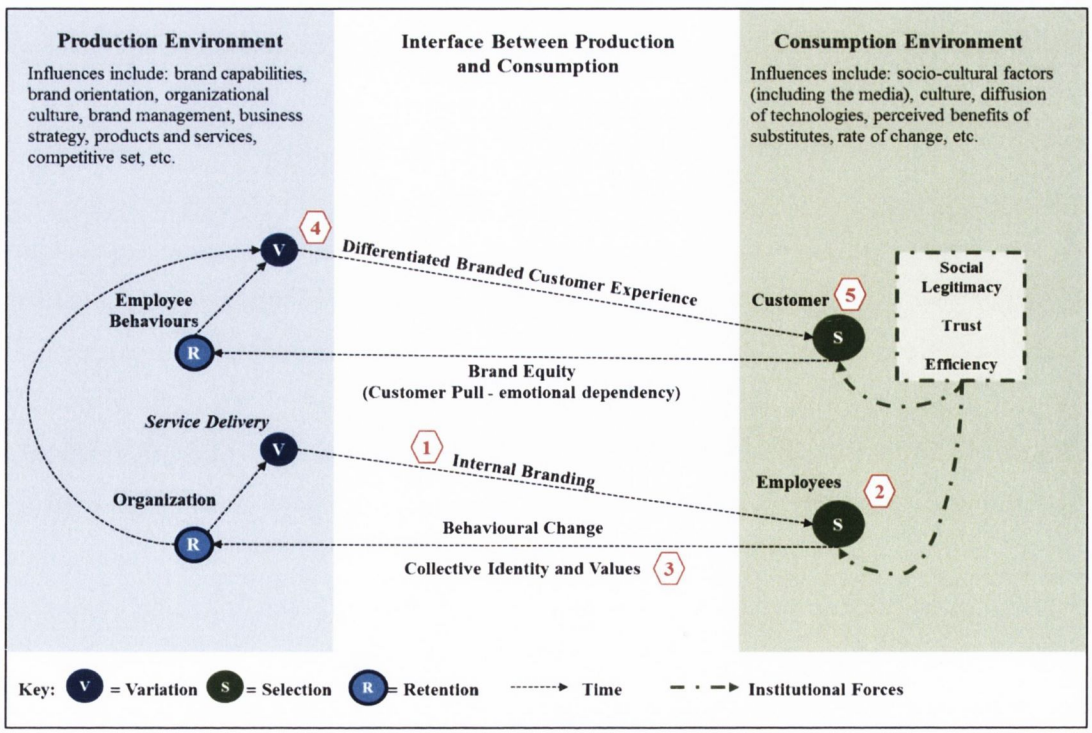


Figure 7-5 Organizational Branding Process

Explanations for internal branding draw on the VRIN characteristics of culture (Barney & Stewart, 2000; Mosley, 2007) but research in organizational change suggests that most change programmes fail (e.g. Beer & Nohria, 2000). The evidence of organizational branding on organizational change is inconclusive in this study. It was observed to succeed more in brand orientated organizations (Urde, 1994, 1999), where brand responsibility rested with the CEO, where the gap between aspired and actual values was small and where it was integral to marcoms and CSR activities.

Brand agency arose from organizational routines and techniques which combined with brand knowledge to address environmental business challenges. Operational capabilities enable organizations to perform basic (brand) activities which should be customer orientated with customer insight guiding innovation. Evidence for this was ambivalent. Despite claims of customer centricity the balance of evidence suggests that innovation, expansion and consolidation strategies were dictated by supply side factors. For example, technology push in telcos saw brands being created to commercialize products with minimal market research. Tariffs and thus tariff brands were designed to obnubilate price comparisons. However, without adequate brand capabilities neither Niland's nor Garvey's were able to sustain the VG brand without Musgraves, indicating the necessity of a threshold level of operational capabilities.

Operational brand capabilities may be insufficient for success. Firms with success in innovation and branding were seen to fail. In mobile handsets Motorola was the brand leader in analogue, Nokia in GPRS and 3G and Blackberry amongst B2B customers. At some point these brands struggled to survive the emergence of new technologies[17], Apple displacing Nokia and Blackberry with the ascendancy of PANS infrastructures and WiFi enabled smartphones. Whether this was a normal result of waves of creative disruption (Schumpeter, 1943), core rigidities in previously successful companies (Leonard-Barton, 1992) or the brand story no longer being compelling (Danneels, 2011) is open to debate.

Helfat and Winter (2011) observe that some capabilities are both operational and dynamic, citing brand management as one such capability. This author supports this observation but suggests that by confining their discussion to product innovation they fail to encompass its full implications. Brand is a dynamic capability because it helps organizations extend and modify their resource base in a changing environment through innovation, facilitating acquisitions and alliances, shaping distribution channels and modifying organizational behaviour[18]. All these have been defined as dynamic capabilities, all are integral to the brand processes and thus evidence of the deliberate use of dynamic capabilities. This is not incommensurable with defining brand as a social technology. Brand is the asset and dynamic capabilities are how phenomena and capabilities are combined and

[17] Nokia's market share in handsets fell from around 80% to 20% between 2007 and 2012.
[18] Wang and Ahmed (2007) depict dynamic capabilities as a firm's behavioural orientation.

reconfigured for survival and growth. One limiting factor in modifying the resource base is brand's path dependency. Constant relaunches and rebrands are evidence of architectural alignment and branding as a dual-purpose operational and dynamic capability whereby brand managers orchestrate resources to avoid being trapped by past (branding) decisions (Augier & Teece, 2008).

7.6.2.4 Competition

Firms succeed in brand competition by producing more compelling customer schema and psychological switching costs than competitors. An unintended consequence can be customer resistance to change. This was seen in retailers' resistance to rebranding following symbol consolidation and in relatively low levels of switching between telecoms suppliers. This inertia may be status quo bias (Kahneman, 2012;Lunn, 2013) not brand loyalty, although it is likely a blend of the two. Brand works on the logic of difference but the cases showed its use in each of Porter's (1980) generic strategies—low cost (e.g. Dunnes, Tesco), differentiation (e.g. Musgraves, Vodafone) and niche (e.g. BT, 48 Hours). Customers perceive relative differences between *brands* and therefore brand competition is a battle for superior relative positioning. By positioning each brand within their architecture firms utilize soft power to build legitimacy and trust (Yoffie & Kwak, 2006) creating relationships which alter conditions of demand. Insufficient differentiation between brands makes customer choice difficult and favours the market leader or incumbent as witnessed in the attrition of telcos following deregulation.

Differential power created by customer dependency influences organizational evolution. Firstly, it dampens the effect of price competition enabling stronger brands to maintain a price premium and appropriate more value than weaker brands thereby improving performance (Peteraf & Barney, 2003). Secondly, it facilitates a shift in the balance of power across the value chain stopping value slipping to intermediaries (Lepak, et al., 2007), forcing channel intermediaries to stock brands or withholding them in exclusivity deals. Thirdly, it exerts countervailing power (Duguid, 2010; Miskell, 2010; Porter, 1974, 1976) where the threat of losing or delisting an important brand acts as a coercive mechanism by which suppliers can be controlled. (e.g. the delisting of Kellogg's by Dunnes in 1983). Within the brand architecture corporate brands are vital in reducing costs of branded and own brand products and centrally procured services, particularly media, thereby reducing the cost achieving adequate SOV[19]. However, channel members have shared goals so brand-induced power must meet firms' mutual objectives as well as organizational self-interest (Mintzberg, et al., 2009). This dynamic is evident, for example, in the relationship between wholesale grocers and symbol retailers building the same brand or branded handset suppliers and MNOs building separate brands.

[19] Media efficiencies were the primary reason that UPC communicated as 'Chorus / NTL a UPC Company' prior to the rebrand to UPC.

7.6.3 Reflections on Brand and Organizations

Brand's primary contribution is to create exchange power which firms can utilize in the execution of strategic goals. The source of this power is the minds of consumers (Leone, et al., 2006) manifesting as customer dependency which acts as an isolating mechanism making competitive positions stable and defensible (Rumelt, 1984). Customer dependence helps organizations survive and adapt to change, facilitates growth, leveraging schemata to position the product, building sustainable competitive advantage and superior performance relative to firms with weaker brands. Brand also generates economic efficiencies, legitimizes products, firms and organizational forms thereby increasing their selective advantage. Brands are created and managed through routines and capabilities, branding being a dual-purpose capability. Finally, the basis for brand's influence on industry evolution is predicated on their success in accruing efficiency and power at the organizational level which contributes to creating architectural bottlenecks.

7.6.4 Brand and Structural Evolution

Having determined brands influence on the organizations that populate an industry and the influence of the environment on brand the discussion returns to the industry level of analysis. A dynamic relationship exists between industry structure and architecture but the influence of brand has material differences in each. This section summarises discussion with respect to structural evolution and hypothesizes brand's influence on structural dynamics. Brands help identify emerging strategic groups and new market spaces and reframes boundaries as industries change. They fuel inter-firm competition benefiting all firms with the resources to survive. Industry boundaries are elastic, stretching in response to increasing transactions. But within these boundaries concentration can increase or decrease. Superior firms with good alignment between brand and business strategy such as Musgraves become kingpins in an increasingly unequal industry (Tae & Jacobides, 2011) or disrupt a maturing market as UPC did in telephony.

7.6.4.1 The Mechanism of Brand's Influence on Industry Structure

The dominant mechanism by which brand influences industry structure is stretch. This increases the overall market size, protecting revenue flow and generating future income and profits. Stretch is underpinned by four basic mechanisms of brand:

- Trust—increasing the number of transactions through lowering transaction costs (TCE);
- Transformation—creating and sustaining the relative differences between products (RBT);
- Identity—creating social legitimacy by conforming to and augmenting individual and collective identities (NIT);
- Pull—using brand equity to diffuse innovation across markets (RDT).

These mechanisms are initiated by branding and through brand acting as a substitute for trust (Barney & Hansen, 1994; Williamson, 1994). This precipitates horizontal competition transforming differences into customer schema which complement and / or enhance identities

which produces customer pull. The impact of stretch triggers vertical competition, retained equity being used to exert power on channel partners. Bargaining power accrued through customer dependency reduces transaction costs with suppliers, stretches the boundary of power, fuels horizontal competition and merger and acquisition. Where this virtuous circle does not arise industries might be expected to contract and decline.

7.6.4.2 Brand's Influence on Structural Dynamics

Explanation of brand's influence on industry structure must encompass the evidence that it helped consolidate a fragmented industry (wholesale grocery), fragment a consolidated industry (telecoms) and re-energised these two mature industries. This section confines discussion to the influence of brand using concepts from the field of technology innovation scholarship. The explanation commences with the emergence of product from proto brands, the extant level of brand when the case narratives commenced.

Product brands were artifacts of the Industrial Revolution, an architectural innovation[20] (Abernathy & Clark, 1985) resulting from transilience in production, consumption and distribution. This paradigm shift (Kuhn, 1970) gave rise to a new 'normal science' of sales and distribution, the emergence of new and reformulation of old industries. Brands were part of the new dominant model within the grocery sector and became diffused across FMCG categories. Thus the enduring market for grocery products experienced de-maturity during this period with the emergence of a fragmented packaged-goods industry. The nascence of brands and their coevolution with advertising enabled producers to maintain direct relationships with consumers (Schwarzkopf, 2010) allowing them to capture value that might have slipped (Lepak, et al., 2007). Brands lowered transaction costs for consumers and increased range for distributors. These multi-lateral benefits enabled brand to survive as the dominant model for generations and was the domain of brand understood by most managers in 1960.

Wholesale grocery was a fragmented industry in 1960 with only proto brands indigenous to it. Transilience saw architectural innovation resulting in symbol group and cash and carry trading. These were commercialized through the adoption of brand, diffused by experts in this technology (Porter, 1980) which helped de-mature or reinvent the industry. Thus whereas the industry was mature its reincarnation around new strategic groups can be conceived as analogous to industry emergence, with brand integral to the dominant model. These strategic groups were fragmented and the industry consolidated and matured around its brands, reducing the number of firms, increasing concentration and serving as a vector for incremental change. Retail and service brands became part of the normal science of distribution (multiples and other services having

[20] Architectural innovations are defined by Abernathy and Clark (1985:7) as innovations which *"depart from established systems of production, and in turn opens up new linkages to markets and users, is characteristic of the creation of new industries as well as the reformulation of new ones"*

contemporaneously adopted them) facilitating the move into foodservice. By 1984 when Telecom Éireann was launched service brands were accepted as normal science in service industries.

Telecoms were a monopoly until the start of deregulation and the opening of the business market to limited competition in the 1980s. Brands started to evolve from proto to basic brands helping segment the industry into technology-based groups addressing different customer segments. But deregulation of customer premises equipment (CPE), data, mobile and finally fixed line telephony caused transilience that fragmented the industry requiring the use of an architectural innovation to connect firms' production with consumers; this was delivered by brands. Thus brand as a normal science arrived later in telecoms than wholesale grocery but the pattern it followed had similarities. Shakeout of early entrants happened quickly and subsequent consolidation happened around brand. However, whereas technological innovation was mainly incremental in wholesale grocery, in telecoms there were Schumpeterian waves of innovation each de-maturing and fragmenting the industry followed by consolidation facilitated by brand.

This section is conceptual and the granularity of the published data makes it hard to quantify. However, it is consistent with the way brands evolved and their role in the coevolution of production and consumption suggesting brands may play a pivotal role in industry de-maturity. It argues that brand is able to facilitate both continuity and change which raises the question of the future. Extreme institutional fracture, differentiated by the use of the word transilience, occurred once in the wholesale grocery narrative, subsequent institutional fractures being sufficient to evolve brand and shift the industry architecture but not requiring architectural innovation. But it is possible that the Internet and Digital Revolution has triggered transilience in the production / consumption interface explaining accelerated change in wholesale grocery subsequent to the removal of the ban on below cost selling in 2006 and the constant movement within the telecoms industry structure. Perhaps the Digital Revolution, like the Industrial Revolution, is seeing a new paradigm of production, consumption and brand emerge.

7.6.5 Reflections on Brand and Structural Evolution

Brand strategy has long been the preserve of firm level strategy but the evidence indicates that it has substantial industry level effects. Brand is an enabler of structural evolution, complementing innovation processes, making change tangible and creating efficiencies. The efficiencies created by stretching the structure and the customer dependencies brands create are the origin of exchange power which determines value capture. The discussion on industry dynamics indicates that brands help stabilize industries after environmental change and offset maturity. It also challenges the voluntarist approach to branding indicating more deterministic lifecycle forces are in action during paradigmatic change consistent with Aldrich's dual-motor adaptation-selection model of change (Aldrich & Ruef, 2006; Van de Ven & Poole, 1995).

7.6.6 Brand and Architectural Evolution

Brand's influence on customers and the resulting effect on structural evolution are antecedent and a product of its influence on architectural evolution. Brand equity enables brands to be successful in vertical brand competition, provides a relational base for market entry and generates evolutionary pressures on the more stable industry architecture. Furthermore technology platforms (Gawer & Cusumano, 2002; Tee & Gawer, 2009) and kingpins (Tae & Jacobides, 2011) drive and emerge from structural evolution with potential to increase that sectors' architectural advantage.

The first stage in explaining how brand creates architectural advantage is to explore one of the central concepts of industry architecture, verifying and certifying quality. Innate in brand is the phenomenon of trust, the guarantor of quality being the level of the value chain in which brands the final customer trusts most are located (Duguid, 2003). To appropriate maximum value it is insufficient to become industry brand leader or have a superior relative brand positioning amongst extended rivals (Porter, 1980), it requires direct influence on the architecture. Moreover trust alone was not observed to change this as both routines and status quo bias favour incumbents. More active phenomena such as desirability or identification are essential to dislodging the guarantor of quality, which happens in concert with institutional change and vertical brand competition.

The second factor to consider is the importance of platforms (Gawer & Cusumano, 2002:Iansiti & Levien, 2004a; Tee & Gawer, 2009). Similar to the manner in which conceptions of technology are confined to physical artifacts the concept of technology platforms is associated with information technology. However, a platform technology can be defined as a *"technology that enables the creation of products and processes that support present, future or past development"*[21] or *"the base upon which other applications, processes or technologies are developed"*[22] consistent with the nature of brand. Furthermore, industry architectures are interfaces that allow independent entities to divide labour (Jacobides, et al., 2006), constrain actions through rules and roles and provide for entrepreneurial opportunities (Jacobides, MacDuffie, & Tae, 2012) all consistent with the agency of brand. As social technologies dictate the division of labour (Nelson & Sampat, 2001) and brands are conditional assets working in conjunction with material assets (Ambler, 2003; Kapferer, 2008) and complementors extracting a higher premium from innovation (Jacobides, et al., 2006) they can be a source of architectural advantage. Therefore brand is at the centre of industry architecture introducing an explicit demand-side perspective to the industry architecture model and explaining customers' influence on superior value capture. Drawing on these insights brand's role in influencing industry architecture will be explained using Figure 7-6[23].

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[21] Sourced from http://en.wikipedia.org/wiki/Platform_technology, 8th January 2014
[22] Sourced from http://www.techopedia.com/definition/3411/platform, 10th May 2014
23 Based on Tee and Gawer (2009:218) and Jacobides (2008)

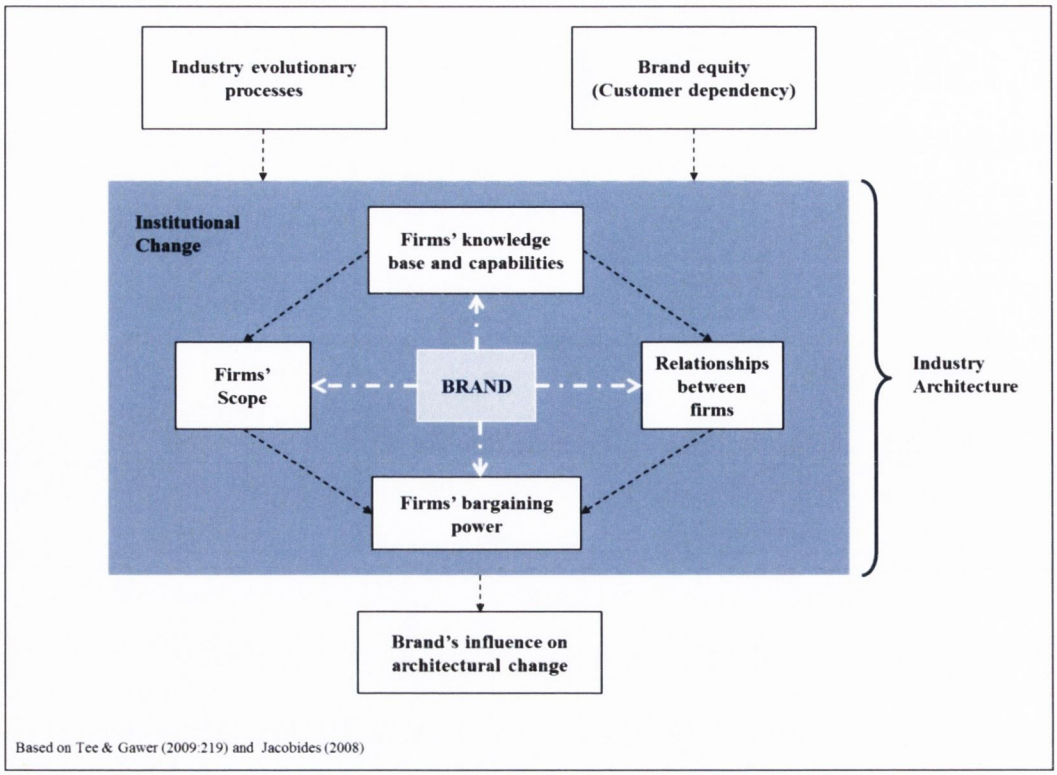


Figure 7-6 Brand and Industry Architecture

Industry architecture is shaped by evolutionary forces including brand equity the source of brands' vertical power. Within the architecture institutional logic determines the nature of change, increasing conformance and disintegration and reintegration around institutional fracture. Operational capabilities effect brand management including architectural alignment during evolutionary change, whilst dynamic capabilities are critical in revolutionary change. However, unlike the RBV which confines capability competition to the market or segment, here capabilities have influence at the level of the value chain (Tae & Jacobides, 2011), the mobility of brand experts being critical to knowledge transfer. Branding capabilities influence firms' scope, the domain of opportunism and transaction costs. Brands reduce transaction costs, legitimise expanded scope by communicating heritage and values in new areas of commercial activity accessed through integration, consolidation or diversification. Importantly brands' influence on transaction costs has an industry-wide effect which can be positive or negative. For example, poor customer experience with one new telco influenced customers' receptiveness to other new telcos to the benefit of the incumbent telco. This simultaneously increased customer dependence on handset brands, a vertical competitor. Conversely the opportunistic approach by multiples during the price wars of the 1980s increased their power relative to brand suppliers and wholesalers. Brands moderate relationships between firms acting as isolating mechanisms built on dependency enabling owners to exert power on channel partners through their ascendancy over the consumer relationship. Brands are a basis for inter-firm cooperation through brand alliances including joint ventures, ingredient branding,

exclusivity deals and cooperative marcoms enabling firms to shape these relationships for mutual advantage and appropriate more value than either could alone.

The outcome of these activities of brand is fourfold. Firstly, brands amplified differences between competitors whereby firms with better capabilities, scope and relationships became kingpins and instrumental in creating bottlenecks. Secondly, they helped turn industries into the guarantor of quality by providing a certification function. Thirdly, they increased the overall bargaining power of the industry relative to other parts of the value chain by building enduring relationships with customers and increasing willingness to pay. Fourthly, this bargaining power helps firms survive institutional fractures and compete in changed production-consumption environments. Together these elements are the basis for bottlenecks which bring about architectural advantage.

7.6.7 Reflections on Brand and Architectural Evolution

The primacy of the bargaining power attributable to brand was evident in the case studies. Differential power between brands (brand equity) helps shape industry architectures, is at the heart of the architecture and is the product of architectural change (bargaining power). Yet the discussion of brand's influence on industry architecture is also dependent on its success in mediating transaction, its capabilities and the institutional environment. Kingpins, specifically Musgraves and BWG and their antecedents, were establishing themselves in wholesale grocery as branding emerged and used the complementarity and mobility of their brands to build architectural advantage. However, in telecoms the regulated nature of the industry disturbed the dynamics of the architecture and Eircom failed to exploit this opportunity to build a desirable brand. Only with the arrival of Apple did a kingpin emerge. Finally brand's influence on architectural evolution is contingent on environmental stability. Where institutions fracture brands evolve, architectures shift and firms with strong brands drive emerging architectures benefiting all technologically and environmentally fit (Helfat, et al., 2007) firms in their industry.

7.7 BRAND AND INDUSTRY EVOLUTION - RESEARCH FINDINGS

Having reviewed the influence of brand across multiple levels of the business system and both facets of an industry (structure and architecture) the elements are in place to answer the research question. This section reflects on the chapter so far, framed by the exploratory model, to address how the agency arising from the strategic use of brand by management, forces arising from the environment and the history of past branding activity influence industry evolution.
Brands mediate the interface of production and consumption and are chosen in the selection environment because they reduce transaction costs and complement identity. As a result consumers become psychologically dependent, resistant to competing brands and willing to pay for that brand giving rise to brand equity. This facilitates value creation, enables the producer to profit

from innovation (Teece, 1986), makes competitive positions stable and defensible and can be used to grow the business. The importance of this dependency cannot be overstated; it is the basis for the accumulation of power which can be leveraged to achieve sustainable competitive advantage and the realisation of strategic goals.

Brands make industry boundaries tangible and help reframe boundaries as industries fragment, consolidate or reform. As industries emerge or reform new organizational forms and strategic groups appear which brands make concrete, enabling the formation of collective identities. These create legitimacy, reduce perceived risk, facilitate growth and a sense of stability. The ability of brands to remain contemporary despite industry maturation suggests they play a role in de-maturity (Abernathy & Clark, 1985) and extending the industry's life cycle. Brands affect boundaries' permeability creating barriers to entry for under-resourced brands. But brand equity also serves as a mechanism for entry, making boundaries permeable. Within industry boundaries each brand represents a different story and competition between these stories stretches the four boundaries increasing overall value created.

Firms require operational capabilities to manage brands and dynamic capabilities to create future brand-based opportunities. Similarly brands legitimize actors and suppliers and isomorphic pressures to conform were evident in both industries. However, resource-based effects and institutional forces were secondary to the two exchange theories (TCE and RDT) with respect to their influence on industry change. It is these theories that best explain the dynamic interaction between industry structure (stretch) and architecture (push) which characterise brand's influence on industry evolution. Stretch emerges from horizontal competition which creates differences (or variations) between products. However, as customers have incomplete information about the market they make boundedly rational decisions (Simon, 1957), trust and heuristics help overcome these cognitive shortcomings (Olesen, 2014) ergo brands help minimize transaction costs. Customer dependencies stimulate vertical competition pushing the influence of brand across the value chain. If the architecture remains stable this dependency creates first order change (Meyer, et al., 1990) stimulating horizontal competition and incremental stretch in the structure. However, when the architecture has been destabilised by institutional fracture and when a new kingpin has emerged in the industry, vertical competition creates a shift in the balance of power, second order change and the emergence of an architectural bottleneck. Because the cause of this bottleneck is customer dependence a new guarantor of quality can emerge.

7.8 CONTRIBUTION

Having completed the discussion of the research findings the thesis now moves towards its conclusion by summarising its contribution and fulfilling the personal, intellectual and practical goals outlined in Chapter 1. The literature review uncovered limited empirical or theoretical evidence linking brand, industry evolution and strategy and it is here that this study makes its primary contribution. This section will start by addressing the personal motivation, specifically whether brands really do play an important role in industry evolution. It will then present the primary contribution which addresses the intellectual goal and answers how brands influence this change. The section moves on to present key evidence of how this contributes to extant knowledge, the conceptual contribution. At a secondary level it then outlines empirical contributions and the achievement of practical goal of the research. In Section 7.8.5 some themes that emerged in this study that have not been answered form the basis of the future research agenda.

Brand has a profound effect on industry evolution effecting structural and architectural change with different theoretical explanations for each. Furthermore while industry experts conceived brand more as a lag indicator than a driver of change the evidence suggests that it both drives change and facilitates adaptation to exogenous change. How this is achieved and the primary contribution is as follows:

> Brand is a social technology that drives industry evolution through its ability to overcome disequilibrium between the environment of production and the environment of consumption. It does so by creating and exploiting customer dependencies. These form a relational basis for a series of processes which impact on the permeability and scope of industry boundaries and augment the ability of industry actors to create and capture value from innovation.

7.8.1 Contribution to Knowledge

The two contributions identified above in themselves address gaps within the industry evolution, strategic management and brand literatures. But embedded in the primary contribution are concepts which in themselves are contributions to the broad literature base reviewed in Chapter 2.

<u>Contribution to the Brand Literature</u>

1. The literature suggests that brand is not one thing but many. This research confirms that the extant conceptions of brand outlined in the literature are integral to it but refutes the underlying premise that brand has no elemental nature. The research proposes that by conceiving brand as a social technology most gaps in extant definitions are addressed. Brand incrementally combines behavioural phenomena orchestrated for human purpose, coevolving with and integral to the delivery of material assets.

2. Brand is redefined as *"a system of values and associations which make some transactions and relationships more desirable than others"*.
3. Brand equity is clearly identified as the asset arising from customer dependencies.

Contribution to the Brand / Industry Evolution Literature

1. The research explains the underlying mechanism for how brands are co-produced by owners and consumers as their agency redresses ongoing disequilibrium between the production and consumption environments.
2. This study was unusual in contemporary brand research by its inclusion of every type of brand encountered enabling patterns to emerge over time and irrespective of the type of material asset they complemented or the industry in which they were created.

Contribution to the Technology Literature

The definition of brand as a social technology firmly positions brand and branding within the technology literature. It illustrates the mechanics of how a non-standard technology evolves and the role of customers and technical experts in the innovative processes, technology transfer and the diffusion of innovation.

Contribution to the Industry Evolution Literature

1. The research suggests that Santos and Eisenhardt's (2005, 2009) conception of two economic (efficiency and competence) and two cognitive (identity and power) boundaries apply to industries thereby contributing to the call for a wider definition of industry boundaries (Malerba & Orsenigo, 1996). Brand-induced changes in any of these dimensions can result in industry evolution, forming a basis for a theoretical explanation of brand's boundary stretching capabilities mooted in the brand literature (e.g. Moon, 2010)
2. Brand's ability to mediate production and consumption may play a role in industry de-maturity. Its ability to facilitate continuity and change enables organizations to survive and profit from structural change as suggested in the brand literature (e.g. Olins, 2003).
3. The cases explored brands in two service industries thereby contributing to the scarcity of empirical research in the evolution of service industries (Malerba & Orsenigo, 1996),

Contribution to Strategic Management / Industry Evolution Literatures

1. Brands form a decision filter for growth strategies and effective use of this filter can create the industry kingpins necessary to the formation of architectural bottlenecks (Tae & Jacobides, 2011). The research shows the centrality of customer dependencies on brands to industry architectures and suggests that to become guarantor of quality requires desirability and relationships in addition to the mitigation of risk. By helping create architectural bottlenecks and shifting the balance of power in the value chain brands enable superior value appropriation.

2. The importance of operational and dynamic branding capabilities links industry evolution with firm level theory, demonstrating how dynamic capabilities can be deliberately established while treating brand in a non-superficial way within the resource-based paradigm.

7.8.2 Conceptual Contribution

The multi-level and multi-modal design of this study is unusual but proved essential as no one theory explained the change processes that emerged. The key theoretical challenge was explanation of the coevolutionary process between the adaptive properties of brand in the production environment and their selective advantage in the consumption environment. As the fundamental role of brand is to mediate this interface it is unsurprising that two mesolevel exchange theories, TCE and RDT, are central. Additionally the influence of organizational capabilities required the use of RBT, a firm level theory, while the strong environmental pressures on industry and brand are explained by NIT, a macrolevel theory.

All brands, even proto brands, are built on the dependence customers have on the safety of the products and services they consume, brands having selective advantage if they reduce customers' perception of physiological, economic or social risks. The value this dependency represents to a producer offsets any advantage of opportunistic adulteration which would undermine trust, reduce selective advantage and destroy the value creating potential of the brand. Thus TCE is important in explaining the emergence of brands and why their selective advantage endures. RDT explains how brands exploit exchange power to create and appropriate value. Dependencies form a relational base for innovation and value creation (soft power) and a basis for bargaining with suppliers and intermediaries in the channel (hard power) facilitating value appropriation. RBT explains how managerial intentionality builds customer relevant differences and coherent brand stories with which customers identify. These are the basis of sustainable competitive advantage. NIT is important in addressing the institutional forces observed. Brands quickly become symbols of legitimacy within any strategic group or industry. This has implications for how brands are organised and communicated by producers and how they are selected by consumers. As symbols brands legitimize the provenance of the product and the identity and social status of the consumer. Therefore to have selective advantage brands must complement and reinforce how customers see themselves in the context of a specific category and purchasing decision.

7.8.3 Empirical Contribution

The longitudinal and contextual nature of the two case studies contributes to the limited empirical evidence of structural evolution over time. The choice of distribution and service industries adds to knowledge on evolution in non-manufacturing industries. The wholesale grocery case study contributes to our understanding of the changing role of wholesale grocers and the role of distributive brands in industry evolution. The telecoms case study is unusual in combining all

technologically defined segments of the industry. The historic and industry data collected serves as a pool of data for analysis by scholars of strategy, industry evolution, business history or brand. As longitudinal studies of brand are unusual this study makes a significant empirical and methodological contribution to this field. Finally, these case studies add a longitudinal dimension to B2B brand research which is rare even in the business history literature.

7.8.4 Contribution to Practice

Practice can be interpreted as marketing (the traditional domain of brand) or strategy. Whilst this study makes a contribution to both the primary contribution should be with respect to the disciplinary lens, strategic management. Reframing brand as a social technology fundamentally changes historic approaches to brand, moving its centre of gravity from marketing and communications to strategic management. Combining this with the new definition of brand, the contribution of the seven brand processes (some unrelated to marketing) and the role of brand in competitive advantage, industry evolution and value capture makes brand relevant, tangible and important for senior managers including brand sceptics. The research offers a simple explanation of brand equity, customer dependency and suggests that brand metrics would be more effective as a guide to management if linked to the behavioural phenomenon they seek to orchestrate. It provides an incentive to explore how brands will evolve in response to the Internet and new media and to be at the forefront of this inevitable change. This research was shared with three senior brand practitioners each of whom was excited by the potential of its findings.

7.8.5 Future Research Agenda

It is important to acknowledge the limitations of research projects and outline suggestions for future study. The research strategy both enabled and constrained the outcomes of the study and although the contribution is a vindication of the choices made some questions remain unanswered. Despite the breadth of this research across industry value chains the study is constrained to two sectors. This raises questions of generalizability and whether these findings are replicable in other service or manufacturing industries. Decisions on case selection may exacerbate this weakness. Many firms and brands were seen to emerge and disappear through both timelines while regulation of the industries influenced industry dynamics and may have undermined the brand processes. For example, the scale and rate of firms and brands entering and leaving the telecoms industry was so pronounced that even gathering the data proved problematic. This might have resulted in selection bias, excluding some evolutionary processes from being uncovered (Aldrich & Ruef, 2006). Similarly, stories of brand and organization failure may not have emerged. The reticence of some interviewees to talk about failures (Williamson, 1999) and potential bias in archival data or individuals' memories may have resulted in the application of brand-derived power being under-stated (Santos & Eisenhardt, 2009) or brand's influence on industry evolution being over stated.

The research left questions unanswered that longitudinal case studies should be able to answer, perhaps with modification. The research had hoped to uncover the relationship between internal branding and industry evolution but there was insufficient data to draw conclusive answers. The fashionability of internal branding within some organizations may even have biased the findings. To address this a bespoke longitudinal study is required perhaps in real time and possibly over a shorter timescale. Likewise brand orientation (Urde, 1994, 1999) was explored to establish a relationship to industry evolution but the findings lack depth. Research designed specifically to measure this may uncover more substantive results. Finally, the role of brand in industry de-maturity indicates that not only can brands remain forever young but so can industries, another area for future longitudinal case research.

The literature indicates that brand is co-produced by producer and customer, the research findings confirm and explain this dynamic, but the actual voice of the consumer is heard only through market profiles and archival data. Therefore assumptions have been made. It is impossible to get primary data on how brands were perceived in the past, cognitive frameworks have evolved, but there is an opportunity to explore the consumers' perspective on the findings. Firstly, research could establish consumers' perception of the relationship between brands and each industry boundary. Secondly, demand-side strategy approaches could be used to explore brand's role in value creation. Thirdly, even brand professionals were inconsistent in their interpretation of brand equity and an exploration of the relationship between customer dependencies and value creation and capture may enhance understanding while linking human phenomena and brand metrics may make brand equity measurement more actionable. All these would require a different research strategy. The seven brand processes are conceptual and require research to establish their full meaning and potential. A barrier to this is the tacit nature of some of these processes particularly architectural alignment suggesting that they would need to be operationalized for more deductive analysis probably involving a quantitative research methodology.

Some themes emerged during the course of the research which were not addressed in this thesis as they do not contribute to its goals. For example, the data collected during the brand expert phase has been little used. It identified the erosion of the influence of marketing in modern organizations, a theme reflected in the reticence of some managers in the two cases to allow marketing to lead internal brand programmes and the attitude towards brand and marketing by managers from other disciplines. Similarly there is an opportunity to explore the dynamic dimension of branding capabilities to ascertain whether they are examples of deliberately based dynamic capabilities (Ambrosini & Bowman, 2009) and their contribution to sustainable competitive advantage. The suggestion that brands are artifacts of cognitive communities is not identified in the literature and may be an opportunity for further research.

The socio-technical basis of the new definition of brand and the conception of brand as a platform resonates with the definition of brand as an organizing principle or the integrating platform (Kornberger, 2010). This is worthy of further exploration. A final suggestion for future research relates to the role of the Internet and the emergence of social media in industry and brand evolution. The temporal nature of a process theory conceives of a past, a present and a future (Van de Ven & Engleman, 2004). But in the context of the digital world is the future now? Will studies of industry evolution transcending our present identify it as a period of transilience and what will be the next evolution of brand?

7.9 REFLECTIONS ON THESIS

Industries are in a constant state of flux due to evolutionary forces arising from the environment and the actions of firms and individuals. Appearances of stability are an illusion predicated on taking a snapshot at one point in time. The longitudinal approach taken in this study clearly demonstrated that although brands may not instigate change they play an integral role in shaping its outcome and determining which organizations and levels of the value chain will profit and lose from it.

Critical realism is concerned with the fundamental nature and capabilities of the objects and events, its focus ontological rather than epistemological. Therefore it was essential to identify the natures of brand and industry before attempting to explain the relationship between them. This formed a basis for uncovering the mechanisms by which brands cause industries to evolve. Brand is defined as a social technology and industries as shared conceptions of cognitive and economic factors contained within four distinct boundaries. Industries, organizations and brand managers are embedded within the environment of production while their customers make decisions in the consumption environment. Brand mediates the interface between them, this coevolutionary process characterised by variation and retention in the production and selection in the consumption environment. Brands selected create customer dependencies the source of differential power and ultimately value captured. By conceiving brand as a technology the explanation for its agency draws on the technology and innovation literatures transmuting brand from marketing to strategy scholarship. Critical realists see research is an ongoing journey of discovery. This research is an important step in building a full understanding of the relationship between the strategic management of brand and industry level change.

APPENDIX A LIST OF INTERVIEWEES

Brand & marketing experts

Interview with	Role	No. of Inter-views
Alan Cox	CEO - Marketing Services Company	1
Eoghan Crawford	Proprietor - Marketing Consultancy. Ex brand and marketing manager FMCG	1
Paul Donovan	CEO - Telecoms Company. Former Marketing Director in FMCG and telcos	1
Jim Dunne	Ex CEO of brand agency and senior brand consultant	1
Janice Epstein	Ex Sales Manager in FMCG food company. Financial Director.	1
David Erixon	Global Brand and Marcoms Director - Telecoms company. CEO of brand consultancy.	2
John Fanning	Ex CEO of advertising agency and senior brand consultant	1
Olive Fogarty	CEO - Marketing Services Company	2
Andrew Meagher	CEO - FMCG Company. Ex Marketing Director FMCG	1
Alda McDonagh	CEO - Marketing Services Company. Ex Marketing Director FMCG.	1
Dara Neary	Head of Culture and Capability - FMCG and formally telecoms. Member of brand internalization team.	1
Ciaran O'Reilly	CEO Marketing services and brand consultant. Ex Senior Account Director Advertising agencies	1
Nicholas Spring	Ex CEO and Marketing Director - FMCG and B2B	1
Dael Wood	Brand Director - Marketing Services Company. Ex brand consultant. Ex CEO advertising agencies	1

Wholesale Grocery Case

Interview with	Role	No. of Inter-views
Joe Barrett	Founder, owner and Director of Petrogas	1
Mitchel Barry	Executive Chairman and CEO of Allied Foods Ltd. Ex Managing Director or Musgraves Frozen Foods	1
Sharon Buckley	Commercial Director, Musgraves Group Plc	1
Michael Campbell	Industry veteran. Ex CEO of ADM Ltd. Director General of IADT/RGDATA	1
Bruce Carswell	Industry veteran. Ex Marketing Director Musgraves Ltd	1
Edel Clancy	Director of Corporate Affairs, Musgrave Group. Former Corporate Affairs Director Eircell	1
Tara Clifford	Strategic Marketing Manager, Centra	1
Adrian Cummins	CEO Restaurant Association of Ireland	1
Kingsley Dempsey	CEO of Parker Advertising	1
Pat Fox	Consultant - Partner in Retail Consultancy. Ex Marketing Manager Keencost and Quinnsworth / Crazy Prices	1
Bill Higgins	Former CEO of Roma Foods and Allegro	1
Donal Horgan	MD Musgrave GB. Former MD Musgrave Retail Partners Ireland	1
Peter Kealy	Industry Veteran. Former MD of BWG Retail	1
Noel Keeley	MD Musgrave Wholesale Partners. Ex HR Director Musgrave Group Plc	1

Michael Kelleher	Group Financial Controller, Musgrave Group Plc	1
Sandra Looney	Training and OD Manager, Musgrave Group Plc	1
Matt Lynch	Owner, Stafford Lynch Ltd (Distributor)	1
Hugh MacKeown	Industry veteran. Former Chairman and CEO of Musgrave Group Plc	1
Philip MacKeown	Non-Executive Director, Musgrave Group	2
Derek Mansfield	Group Sales Manager, Centra	1
Chris Martin	CEO Musgrave Group Plc	1
Theresa McCarthy	MRPI administration manager	1
Fergus McKenna	Former Sales Director, Batchelors	1
Aidan Morrison	Industry veteran. Former Marketing Director BWG	1
Tim Nolan	Industry veteran. Former Marketing Director IMD and Musgrave. Founder Irish Grocers Benevolent Fund	1
Willie O'Byrne	MD of BWG Ltd.	1
Sarah O'Mahony	Marketing Manager, Barry Group	1
Norma O'Sullivan	PA to CEO, Musgrave Group	1
Edel Russell	Head of Loyalty and Insight, MRPI	1
Seamus Scally	Chairman, Musgraves Plc	1
Suzanne Weldon	Marketing Director, BWG	1

Telecommunications case

Interview with	Role	No. of Inter-views
Stephen Brewer	Ex CEO of Eircell. Investor in Just Mobile.	2
Edel Clancy	Ex Corporate Affairs Director, Eircell	1
Mark Coan	Sales and Marketing Director UPC	1
Tara Delaney	Ex Corporate Affairs Director, Eircell and Vodafone	1
Paul Donovan	CEO Eircom. Past CEO Eircell and Vodafone	1
Jim Dunne	Past MD of Identity Business - Brand Consultant	1
Gerry Fahy	Former Strategy Director, Eircell and Vodafone	1
Celine Fitzgerald	Former Director Vodafone and CEO Rigney Dolphin	1
Miriam Hughes	Group CEO of DDFH&B Advertising Agency	1
Alfie Kane	CEO of Telecom Eireann/Eircom. Director of Vodafone	2
Dorothy Kelly	Head of Insights Vodafone and O_2. Consultant in Eircom	1
Enda Lynch	Sponsorship Manager O_2. (Ex) Vodafone	1
Don Maher	Industry Veteran - Director Let's Talk Phones, Eircell, Vodafone, Fonua	1
David McCarthy	Manager Telecom Éireann, Eircell, Postfone and Vodafone	2
Sean Melly	Founder and CEO of TCL. Chairman Just Mobile.	1
Eavann Murphy	Head of Strategy, Vodafone	1
Anthony O'Neill	Customer Experience Manager Eircom. Vodafone and O_2	1
Ciaran O'Reilly	CEO - Marketing Services Company	1
Sinead Spillane	Head of Brand and Marcoms, Three Ireland	1
Rosemary Steen	Head of Corporate Affairs, Vodafone	1
Martin Wells	Customer Operations Director, Vodafone	1

APPENDIX B DEFINITION OF GROCERY GOODS

Category No.	Description
1	**Fresh fruit and vegetables**
2	**Meat and fish - not cooked or cured**
3	**Dairy products and bread** Bread; Breakfast cereals; Dairy products (milk, cheese etc.) and eggs; Butter, margarine and other oils
4	**Household necessaries (non-durables)** Automatic washing powder/liquid; Dishwasher detergent, washing-up liquid; Household cleaning cream/liquid; Other cleaning materials; Toilet paper, soap; Shower gel, toothpaste; Shampoo, shaving foam, deodorant; Baby powder, disposable nappies; Sanitary towels, tissues
5	**Other food products** Meat and fish – cooked, cured and frozen; Flour; Biscuits and cakes; Sugar, sweeteners and preserves; Sweets and chocolate, desserts and ice cream; Condiments and sauces, soups and miscellaneous items
6	**Alcoholic drinks (consumed at home)**
7	**Non-alcoholic drinks**

Source: Competition Authority (2008) p 14.

APPENDIX C TELECOMMUNICATIONS SERVICES SECTOR

The European reference classification for economic activities is NACE. The system was revised and NACE Rev.2 was implemented from 2007. The telecommunications services sector is covered by NACE Rev.2 Division 61. The division is encompasses all companies providing telecommunications and related service activities, that is transmitting voice, data, text sound and video. The division is classified into four groups:

- Wired telecommunications activities (Group 61.1)
- Wireless telecommunications activities (Group 61.2)
- Satellite telecommunications activities (Group 61.3)
- Other telecommunications activities (Group 61.9)

The commonality of activities classified is the transmission of content, without being involved in its creation.

Source: Eurostat. (2012b)

APPENDIX D TELCOMMUNICATIONS LEGISLATION

Dating back to before the foundation of the Irish State telecommunications have been subject to a strong legislative and regulatory environment. Since accession to the European Community much of the impetus for legislative change was driven by Europe with directives being enacted through the Dail and with frequent amendments and revocations. The table below outlines some key legislative milestones:

Year	Legislation Introduced
1926	Wireless Telegraphy Act, 1926 (No. 45 of 1926)
1956	Wireless Telegraphy Act, 1956 (No.4 of 1956)
1972	Wireless Telegraphy Act, 1972 (No. 5 of 1972)
1983	Postal & Telecommunications Services Act, 1983 (No. 24 of 1983)
1984	Postal & Telecommunications Services (Amendment) Act, 1983 (No. 10 of 1984)
1988	Broadcast & Wireless Telegraphy Act, 1988 (No. 19 of 1988)
1992	European Communities (Telecommunications Services) Regulations,1992 (No 45 of 1992)
1993	Interception of Postal Packets & Telecommunications Messages (Regulation) Act, 1993 (No. 10 of 1993)
1994	European Communities (Application of Open Network Provision to Leased Lines) Regulations, 1994 (No 328 of 1994)
1996	Telecommunications (Miscellaneous Provisions) Act, 1996 (No. 34 of 1996)
1997	European Communities (Telecommunications Terminal Equipment) Regulations, 1997 (No. 73 of 1997)
1997	European Communities (Telecommunications Infrastructure) Regulations, 1997 (No.338 of 1997)
1997	European Communities (Satellite Telecommunications Services) Regulations, 1997 (No. 372 of 1997)
1997	European Communities (Application of Open Network Provision to Voice Telephony) Regulations, 1997 (No 445 of 1997)
1998	European Communities (Interconnection in Telecommunications) Regulations, 1998 (No.15 of 1998)
1998	European Communities (Telecommunications licences) Regulations,1998 (No.96 of 1998)
1998	Adaptation to Competitive Environment, European Communities (Leased Lines) Regulations 1998 (No. 109 of 1998)
1998	European Communities (Full Competition in Telecommunications) Regulations, 1998 (No.180 of 1998)
1998	European Communities (Full Competition in Telecommunications) Regulations, 1998 (No.180 of 1998)
1999	Postal & Telecommunications Services (Amendment) Act, 1999 (No. 5 of 1999)
1999	European Communities (Telecommunications Infrastructure) Amendment Regulations, 1999 (No. 70 of 1999)
1999	European Communities (Voice Telephony and Universal Services) Regulations 1999. (No. 71 of 1999)
1999	Number portability and Carrier Pre-selection, European Communities (Interconnection in Telecommunications) Amendment Regulation, 1999 (No. 249 of 1999)
2000	European Communities (Telecommunications Licences) (Amendment) Regulations, 2000 (No. 70 of 2000)
2002	Communications Regulation Act, 2002 (No. 20 of 2002)
2003	Digital Hub Development Agency Act, 2003 (No. 23 of 2003)
2007	Communications Regulation (Amendment) Act, 2007 (No. 22 of 2007)
2007	Communications (Mobile Telephone Roaming) Regulations, 2007 (No. 792 of 2007)
2010	Communications Regulation (Premium Rate Services and Electronic Communications Infrastructure) Act, 2010 (No. 2 of 2010)

The primary source is the Department of Communications, Energy and Natural Resources (2011)

APPENDIX E ELECTRONIC COMMUNICATIONS MARKETS (EU)

The Commission for Communications Regulation (ComReg) base the process of regulation on a list of markets contained in the Recommendation on Relevant Products and Services Markets in accordance with Directive 2002/21/EC of the European Parliament and of the Council on a common regulatory framework for the electronic communications networks and services.

The Commission Recommendation observes that the definition of relevant markets can change over time as the characteristics of services evolve. Markets are defined in accordance with competition law and national regulatory authorities are responsible for defining relevant markets appropriate to the national circumstances. In 2013 recommendations were based on guidelines approved in Brussels in December 2007 markets being:

Retail Level

1. Access to the public telephone network at a fixed location for residential and non-residential customers.

Wholesale level

2. Call origination on the public telephone network provided at a fixed location.
3. Call termination on individual public telephone networks provided at a fixed location.
4. Wholesale (physical) network infrastructure access (including shared or fully unbundled access) at a fixed location.
5. Wholesale broadband access.
6. Wholesale terminating segments of leased lines, irrespective of the technology used to provide leased or dedicated capacity.
7. Voice call termination on individual mobile networks.

Sources: European Union. (2007)

APPENDIX F EXPERT VIEWS ON BRAND ROLES

Role of brand	Explanation for this role in value creation and Capture	Examples of Evidence for this role
Reduce perceived risk	Build trust - mitigate opportunism. Offset economic, social, psychological and experiential risks to customers.	*"It's all about there being no risk, about reducing risk in purchasing."*[1] *"The power of brand is risk reduction"*[2]. *"It's the trust that consumers have in your product ... it's 'can I trust them, will they be there next week and are they going to deliver on their promises?'"*[3] *"Brand says something about who you are as a company, because of who you associated yourself with"*[4] *"A promise of trust that my needs are met, beyond the physical product needs".*[5] *"It's a guarantee that you are doing the right thing"*[6]
Differentiate from competition	Creates unique rational and emotional associations. Facilitate customer segmentation and choice Justify price premium over products that fulfil a broadly similar purpose. Act as a practical and emotional barrier to entry and exit.	*"Creates difference - that's the fundamental purpose in a market of increasingly homogenous products"*[7]. *"If you have a unique, compelling and differentiate positioning then you have a brand"*[8]. *"Shops are showrooms for brands, sometimes the brand sits alongside others...it takes a nanosecond to identify the brand. The propensity to choose brand X is customer predisposition and standout"*[9]. *"In buying a brand it allows you to make a simple decision...it short circuits the decision making process"*[10] *"Brand implies that we get a premium"*[11] *"more money for equivalent products and more predictability of sales than just price"*[12] *"A preference, some degree of loyalty, some degree of emotional attachment...If you take it away I am going to feel something. Resistance to jumping is greater. That emotional attachment is a premium"*[13]
Communicate quality and value	Signal and certify quality. Make perceived quality concrete and memorable. Facilitate choice, including routine choice. Facilitates cognitive processes in mind.	*"It means something over and above the logo, the colour the packaging, it's a promise, know they're going to get quality"*[14] *"Brands are a mental selection of our own persona – we select things that say something about you"*[15] *"...the parameters of choice are immense, you can't command all the choices, such as 200 brands of toothpaste. So you limit to a convenient number of choices to your core."*[16] *"Some products in repertoire it's just "get it in". Some of it is about I have an account with them ... they're easy to deal with and they'll deliver on time, I'll go with them. I trust them"*[17]. *"Our use of communications allowed us to get a significant price premium, we used TV, radio and press rather than just the specialist press."*[18]
Act as interface between firm and customer	Reduce complexity and facilitate choice through brand recognition. Create sense of identity and belonging - builds communities. Create sense of trust and confidence. Represent the organization.	*"The brand is a space where what a company does is received by the customer. A good understanding of customers and good marketing leads to alignment between attributes of product (or service) and the needs of the customer. It is the summation of the company's efforts to comfortably satisfy the consumer."*[19] *"Brand is about two things, delivering utility, what useful role it can play in somebody's life. The second part is the idea of brand platforms, more than just building communities around a brand, it's a place where the utility and the platform connect with consumers"*[20] *"Brands are a badge of belonging"*[21]. *"In B2B the relationship tends to be the basis for a lot of the branding idea...because that's how business is done. Business is done between people rather than between a product and a person."*[22] *Relationships and relationship management are important in delivering brand*[23]

Role of brand	Explanation for this role in value creation and Capture	Examples of Evidence for this role
Create efficiencies (economies of scale and scope)	Economize on marketing spend. Create internal efficiencies. Leverage relationships. Optimize organizational form.	*"Some companies believe implicitly in branding and the issue is around looking for efficiencies in marketing communications"* [24] *It is important to manage the brand portfolio effectively and leverage the equity for each brand*[25]. *Brand architecture is about identifying each brand in the portfolio, the relationship between them, and managing them to ensure that they are complementing each other*[26]. *"The boom brought an appetite for marketing and branding ...in FMCG the focus was on brand extensions"*[27]. *"Branding offers a pipeline of innovation"* [28] *Helps determine how innovation is brought about.* [29]
Shift balance of power within value creation chain	Generate customer pull in channel - influence buying decisions, motivate distributors, and drive demand downstream. Drive innovations through powerful relationships. Provide barriers to entry	*"In a high involvement category, say a computer ... you would research all PC brands, and because there is very little difference you will buy an unknown brand from a trusted retailer but if it is an unknown retailer you would more likely buy the HP because you would need the confidence in it"*[30]. *"Retailers are the "enemy brand" in a recession"* [31] *"Brands that have to deal with retailers are in much more serious trouble than those that don't"* [32]. *"There are all sorts of channels of distribution and design is a major channel of communication and Apple have done this better than anyone else"*[33]. *"People are exposed to other brands, legitimate brands...cheap brands and they find their way into the market and weakens the power of the brand"*[34]
Generate and protect future revenues	Protect valuable resources. Encourage inward investment. Generate increased cash flows Keep products relevant. Capture value latent in acquired brand assets. Diversify risk. Create loyalty bias in customer. Increase value of company when sold.	*"It's a mark of ownership"*[35] *"It's a future income flow we can get. Our brands are our ability to earn revenue, to continue to get a premium and generate an income into the future*[36]. *"It is a driver of revenue or retention for the business"*[37] *"... emotional attachment is a premium. Generates forgiveness that is 'when you mess up you will be forgiven'. Brands generate permission"*[38] *... managing, manipulating and positioning the brand for future advantage*[39] *"More predictability of sales into the future rather than just price"* [40] *"When a company is being sold the 'goodwill' line is essentially the value of the brand – the value added over the tangible, that's brand at a company level – how customers feel about you. Strong brands can lead to better deals – with banks who may give a better deal if your brand is strong – and with other suppliers, customers – because people want to be seen working with it"*[41].
Assist growth and maintenance of company reputation	Signal relationship between product and the organization behind it. Builds trust -reassures promises will be kept. Demonstrates long-term commitment to company strategy.	*Architecture signals the relationship that exists between those brands i.e. product master brand relationship and where there a halo effect or differences*[42]. *Credibility can be a proxy for brand*[43]. *"... there is a level of comfort in knowing that these are the biggest brands, the best brands and you're buying safely... From a corporate point of view you'll never be told that you've screwed up for buying this brand. If the brand lets you down, then the brand has let you down but you are seen to have done the right thing"*[44] *Brands in B2B are talking about reputation, about standout, credibility, ethics, reputation.*[45] *"Reputation management is really important. And Net Promoter Score is going to become the biggest brand marketing metric of them all"* [46]
Facilitate inter-firm collaboration and cooperation	Catalyst for cooperation - builds relationships. Facilitate outsourcing decisions, inter-company knowledge and capability transfer.	*"Partner brands and ingredient brands are really important"*[47] *"Marketing is one area where it (outsourcing) is done more than other areas. The advertising agency is kept on tap... as is the brand agency"*[48]

Role of brand	Explanation for this role in value creation and Capture	Examples of Evidence for this role
Legitimise corporate behaviour and activities.	Manifestor of business model. Manage changing external environmental demands. Humanise corporation - badge of ethical behaviour Legitimise corporate action and acts as a vehicle for CSR	*"Brand is the outward manifestation of the company's value proposition."*[49] *"Our businesses are real brands, with differentiated positionings. They are there because it is convenient"*[50]. *"We need a brand name, one of the top four, it's a big statement"*[51]. *"Context massively shapes (brand) thinking"*[52]. *"If anything in the context box create a sense of crisis, you can really capitalise on it (in a branding programme)"* [53] *Both risk and culture influence the importance of brand"*[54]
Effect organizational culture to deliver strategic vision	Embody organizational memory - cultural capital for growth. Creates rituals. Facilitates HR and recruitment - provides identity, community and opportunities to employees. Embody values of founders and leaders. Align policies with stakeholder values.	*"The culture of a company is its story and that is in turn its brand so there is no difference - it doesn't end. However, not every organization understands its culture well enough and sometimes it communicates different messages. But if you understand it and realise that that is the story and then you try to put the most positive, attractive way to tell that story and the story can change"*[55]. *"The culture comes from the values. The values represent what is important to us...core values create the culture you want. If you have values that's a shortcut to defining where you are"*[56]. *"I try to steer or move the culture to a different place. But even if nobody did anything it would grow up first from the traditions. Even in smaller organizations where the CEO sets the seal on the culture – like Branson (Virgin) – he has stamped his personality on the organization and that has become the culture"*[57] *"Brands evolve out of a culture more naturally and less scientifically and managerially than you might think*[58].
Influence organizational processes, policies and systems to facilitate performance and change	Provides common ground and facilitates cross department cooperation. Creates routines and influences decision rules. Intra-firm knowledge and capability transfer. Build corporate structure and influences governance. Facilitates organizational flexibility and change, including after M&A activity	*The importance of brand relates to where it is seen in the power base of the organization*[59] *When you have the values what are the behaviours that underpin those values? ...What are the competencies that drive the behaviours? What are the things that we reward, that we promote people for, that we hire people based on? ...What we want to be is the brand, and in organizations where there is that kind of symmetry, where there is that consistency from external right through to internal, that's where you have the most power."*[60] *Branding had to become more than graphic skills and is now an internal process with outsourced graphic skills ...Branding has changed, it needs to speak to organizational specialists, business analysts, etc., to speak from the value system (the DNA) which pushes brand closer to corporate strategy than brand strategy. It links to value and is the role of the CEO to drive this value into the business.*[61]

All comments based on personal interviews: Alan Cox [2, 4, 50, 51]; Eoghan Crawford [59]; Paul Donovan [9, 15, 19, 30, 35, 41, 49]; Jim Dunne [12, 13, 38, 40, 45, 61]; David Erixon [23, 25, 29, 43]; John Fanning [7, 16, 32, 33, 55, 58]; Alda McDonagh [5, 27, 28, 31, 37, 52]; Andrew Meagher [3, 6, 10, 11, 14, 21, 34, 36, 44]; Dara Neary [48, 53, 56, 57, 60], Ciaran O'Reilly [8, 17, 20, 22, 46, 47]; Nicholas Spring [1, 18, 24, 54]; Dael Wood [26, 39, 42]

APPENDIX G BRAND CONCENTRATION IN GROCERY

Grocery Categories With High Concentration of Brands 2010

Category	Top 5 Brands share of category (%)	Value of Category (Ranking)
Oral Analgesics	97	73
Cough and Cold Remedies	96	88
Bleach & Laundry Additives	96	94
Indigestion Remedies	95	96
Instant Snacks	93	100
Margarine	92	49
Bouillon Cubes / Gravy Mixes	91	70
Toothpaste	90	47
Batteries	89	62
Baby Milks / Meals / Rusks	88	28
Canned Baked Beans	88	54
Mouthwashes	88	84
Sport / Energy	87	11
Chewing Gum	87	32
Disposable Nappies	86	30
Tomato Ketchup	86	78
Meal Kits	86	99
Carbonated Soft Drinks	85	4
Packaged Tea / Tea Bags	85	23

Source: Checkout. (2010g)

APPENDIX H VALUABLE GROCERY CATEGORIES

Most Valuable Grocery Categories 2009-2010

Category	Value of Category (Ranking)	Top 5 Brands share of category 2010 (%)	Top 5 Brands share of category 2009 (%)	Change in Top 5 Brands share
Confectionery	1	23	21	9%
Milk	2	44	52	-18%
Packaged Bakery	3	55	63	-15%
Carbonated Soft Drinks	4	85	85	0%
Biscuits	5	47	69	-47%
Crisps / Snacks	6	81	81	0%
Yogurt and Yoghurt Drinks	7	74	81	-9%
Prepared Sliced Meat	8	47	69	-47%
Fruit Juice	9	34	36	-6%
Cheese	10	32	40	-25%

Source: Checkout. (2010g)

APPENDIX I EVOLUTION OF THE GROCERIES ORDERS

The first Restrictive Practices (Groceries) Order was made in 1956 and the Order was finally abolished in 2006 under the terms of the Competition (Amendment) Act (2006). During the lifetime of the Groceries Order there were a series of reviews and amendments to address the changing state of the grocery market and issues impacting on competition within it. Between April and June 1955, the FTC held a public enquiry into:

> *"the conditions which obtain in regard to the supply and distribution of grocery goods and provisions, namely, such foodstuffs (excluding flour, wheaten meal, bread, milk, mineral waters, confectionery, fresh fruit and fresh vegetables) and household necessaries as are ordinarily sold in grocery and provision shops."*

The Restrictive Practices (Groceries) Order, 1956 was enacted but was amended to *"render a number of its provisions more equitable"* in 1958 before it came into effect. In 1966 a Review of the Operation of Orders by the FTC recommended no changes in the Order.

A 1972 report by the FTC recommended changes with respect to food retailing and two orders were enacted in 1973. The second of these orders established a ban on retailers advertising goods at *"a price that is less than the price...at which he purchased the goods"* (the ban on below cost advertising). The Order was reviewed in 1975 by the Restrictive Practices Commission (RPC) and no changes were made. In 1978 the Order was amended twice. The first amendment expanded the scope of the Order to address issues relating to supplier terms and conditions and to own brand products. The second triggered by the wholesaler led Willwood boycott enabled *"suppliers to withhold supplies from persons who engaged in below cost selling"* and recommended changes so as to introduce the notion of selling below *"the net invoice price"*. In November 1980, the RPC reported on an enquiry into the specific issue of below cost selling which it concluded could not be justified but recommended a strengthening of the ban on below cost advertising. It also recommended that all extant orders be consolidated into one new Order and the inclusion of a definition of the term *"net invoice price"* based in the High Court's interpretation. These amendments were accomplished through the 1981 Order. Below cost selling was the focus of a further review in 1986 by the RPC which recommended the inclusion of alcoholic drinks and own brand products within the scope of the Order. It recommended a prohibition of Hello Money and a ban on below cost selling. The 1987 Groceries Order came into effect in December 1987.

The first review of the 1987 Order was reported by the FTC in 1991, recommending that the ban on below cost selling be repealed as did subsequent reviews by the Competition & Mergers Review Group (2000), the OECD (2001) and the National Competitiveness Council (2004). No action was taken in this regard. A Report from the Oireachtas Committee on Enterprise and Small Business published in 2005 on the "Impact of Grocery Multiples on the Grocery and Retail Markets and its effect on Consumers, Small Grocery Retailers and Small Grocery Suppliers" recommended the retention of the ban on below cost selling and was welcomed by independents and symbol groups.

At the same time a report for the Minister for Enterprise Trade and Employment, Mary Harney TD, recommended that the Grocery Order be revoked. Disparity between reports was predicated by their different focuses with consumer lower prices being only one of factors taken into account by the Oireachtas Committee but the only focus of the Consumer Strategy Group. In 2005 the Minister for Enterprise Michael Martin announced plans to repeal the Groceries Order and in 2006 introduced the Competition (Amendment) Act 2006 which revoked the Groceries Order and amended the Competition Act 2002 to prohibit activities "which prevent, restrict or distort competition in trade in grocery goods in the state". The Act was enacted on 11th March 2006 finally revoking the Groceries Order.

Source: The primary reference is Department of Enterprise Trade and Employment. (2005)

APPENDIX J WHOLESALER SPONSORSHIP AND CSR 1997-2011

	Brand	Sponsorship	CSR
Crumlin Hospital	Barry Group		xxx
The Apprentice	Carry Out	Media	
Emmerdale	Centra	Media	
Homemaker of the Year	Centra	Community	
GAA All Ireland Senior Hurling Championship	Centra	Sport	
Great Nights In	Centra	Media	
CSI	Costcutter	Media	
Nationwide	Gala	Media	
All Ireland Junior Camogie Championship	Gala	Sport	
All Ireland Senior Camogie Championship	Gala	Sport	
Jack & Jill Foundation	Gala		xxx
Home from Home	Homestead		xxx
Come Dine With Me	Londis	Media	
Write Up My Street	Londis		xxx
Safe to School	Mace		xxx
Pakistan Flood Appeal	Mace		xxx
Official Partner to Cork 2005	Musgrave	Culture	
Musgrave Triathlon	Musgrave		xxx
Catex	Musgrave Foodservice	Exhibition	
Fair City	SPAR	Media	
Kitchen Hero	SPAR	Media	
The Apprentice	SPAR	Media	
Spartan Challenge	SPAR	Sport	
Annual Golf Day	Stonehouse		xxx
Recipe for Success	Supervalu	Media	
GAA All Ireland Senior Football Championship	Supervalu	Sport	
Irish Food Producer of the Year Award	Supervalu	B2B	
National Tidy Towns Competition	Supervalu	Community	

Compiled from personal interviews with Sarah O'Mahony, Norma O'Sullivan, Edel Russell and Suzanne Weldon; Checkout. (2006a); Checkout. (2010c); Checkout. (2010b); Checkout. (2010e); Londis (2011); Musgrave Group (1998); Retail News (2004b); Retail News (2005b); Retail News. (2006a); Retail News. (2007a); Retail News (2009b); Retail News (2009a); Retail News (2010a); Retail News (2010d); Retail News (2010b); Shelflife (2007); Shelflife (2009a); Shelflife (2009b); Irish Independent (2011).

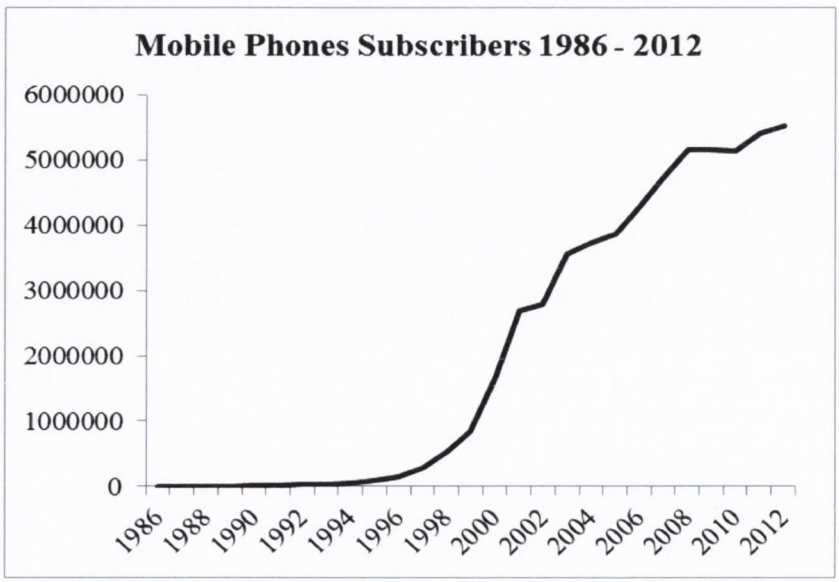
APPENDIX K TELECOM ÉIREANN BRAND BUILDING - 1984-1994

Year	Activity
1984	Launch of Changing Shapes campaign
1985	Freefone services provided for Live Aid for Africa, The Budget and Carroll's Irish Open Golf Championship
1985	Telephone directories relaunched with more information and use of colour
1985	Relationship with Special Olympics Ireland commences
1986	Phone box anti-vandalism campaign launched, fronted by Bob Geldof
1988	Telecom Éireann Call Cards launched with design emphasis on Irish icons
1989	Weatherline, sponsorship of weather forecasts on RTE commences
1990	Sponsorship of Schools Choral Competition
1991	"Community Diary" sponsorship across 22 local radio stations
1991	Winner of Glor na nGael award for advertising in Irish language
1991	Foundation sponsor Dublin European City of Culture 1991
1992	Sponsor of RTE coverage of GAA All-Ireland hurling and football
1992	Sponsor of RTE Rose of Tralee festival
1994	Home for Christmas promotion in conjunction with Gay Byrne Show
1994	Launch of Bridges corporate campaign

Selection of Telecom Éireann Brand Building Activities 1984-1994

Source: Compiled from An Bord Telecom (1985; 1986; 1988; 1989; 1991; 1992); Xchange (1995a; 1995b)

APPENDIX L GROWTH IN MOBILE SUBSCRIBER BASE 1986 - 2012



Source: An Bord Telecom (1986-1992); Davy Equity Research. (1999c): Mintel (2000b); ODTR (2001-2002); ComReg Quarterly Reports (2003-2012).

APPENDIX M PROPOSITION AND TARIFF BRANDS 1995-2000

	Proposition and Tariff Brands
Eircell	Call a Friend for Free; Playback; Eirtime; Eircell Timeout 200; Eircell Alltime
Esat Digifone	Digiplans; Digifone Secretary; Night Owl; Early Bird; Weekender Plus
Esat Telecom	Easy Call; Esat in Touch; Open Access; Telenumbers; Conference Connect
Ocean	Ocean Link; Ocean Quantum; Ocean Small World
Telecom Éireann /Eircom	Circle of Friends; Call Save; Phoneplus; Eircom Options

Sources: An Bord Telecom (1989); Business 2000 (1999-2000b); Davy Equity Research (1998; 1999c; 1999e, 1999f); Forfas (1999); Mason Communications (2000); Mintel (2000b); Wall (1998); Xchange (1995a).

APPENDIX N TELECOMS SPONSORSHIP AND CSR 2001-2006

	Brand	Sponsorship	CSR
Football Association of Ireland	Eircom	Sport	
Golden Spider Awards	Eircom	B2B	
Special Olympics Ireland	Eircom		xxx
Weather Forecasts (RTE)	Eircom	Media	
The Dunphy Show (TV3)	Esat BT	Media	
Golden Spider Awards	Esat BT	B2B	
Last Word on Today FM	Esat BT	Media	
Young Scientists and Technology Exhibition	Esat BT / BT	Community	
Meteor Music Awards	Meteor	Culture	
Telethon People in Need 2007	Meteor		xxx
Cork GAA	O_2	Sports	
Irish Autism Action	O_2		xxx
Irish Rugby Team	O_2	Sports	
Ryder Cup (co-sponsor)	O_2	Sports	
Last Word on Football Today FM	Three	Media	
Tom Dunne on Today FM	Three	Media	
Today FM Business Show	Three	Media	
Clare GAA	Vodafone	Sport	
Dublin & Cork Airport Airbridges	Vodafone	Corporate	
GAA AllStars	Vodafone	Sport	
The Mentor (RTE)	Vodafone	Media	
The Vodafone Foundation	Vodafone		xxx

Source: Personal interviews with Paul Donovan, Celine Fitzgerald, Dorothy Kelly, Enda Lynch, Eavann Murphy, Anthony O'Neill, Sinead Spillane and Rosemary Steen. Personal recollections Helen Marks. Carroll & Moorehead (2005); Cullen (2007); Dooley et. al.. (2011); Eircom (1999a); Eircom (2005).

APPENDIX O LEVELS OF BRAND EVOLUTION

This table outlines the nomenclature used to describe the level of brand evolution and the scope of the brand construct it describes. These explanations were initially based on the literature review.

Name	Description of Scope of Brand Construct
Proto Brand	Embryonic brands. Antecedent of true brand. Brand as an identifier of origin and signal of ownership. Reduces perceived transactional risk. Signals provenance
Basic Brand	Simple form of brand. Brand as identifier and differentiator. Facilitates diversification. Legitimises product and company. Communicates quality. Facilitates inter-firm cooperation. Creates efficiencies.
Augmented Brand	Enhanced form of brand. Brand as a positioning and personality. Creates loyalty bias in customer base. Assists in growth of company reputation. Influences organizational processes.
Evolved brand	Holistic form of brand. Brand as an organizing principle or highly augmented brand. Brand influences organizational policies and systems. Manifestation of business model. Effect organizational culture to deliver strategic vision.

APPENDIX P WHOLESALE GROCERY NARRATIVE ANALYSIS

The analysis is presented in a condensed tabular form. The horizontal axis of the table displays the empirically observable elements of the exploratory framework and the vertical axis represents the timeline of the case narrative facilitating an understanding of how the process of change unfolded over time. The table below explains each element in the table and gives an example using data from 1960 to 1966.

Column Headings	Explanation of Column Content	Example
Date	Either a specific date of an event, or a range of years during which a trend or change emerged	1960—1966
Significant Contextual Events and Factors	Changes in political, legal, socio-cultural, economic and technological environment. *Italics indicate factors that emerged or became important across specific time period*	Exposure to voluntary group retailing and cash and carry abroad results in their introduction into Ireland. This happens at the same time as self-service and supermarkets begin to expand facilitated by social change especially urbanization and increased mobility
Other Contextual Factors	Factors which influenced the institutional or task environment across the specific time period.	Ireland had open economy characterized by a Free Trade policy. The grocery market was regulated under the Restrictive Practices (Groceries) Orders. Brand expertise was most developed in advertising agencies.
Industry Narrative	Key events that occurred within the industry or value chain with specific relevance to brand and change	(1960) EDL launch Golden Goose (1961) Musgraves open cash and carry (1962) VG launch by IMD (buying group) (1963) SPAR launched by AWL, MUM & Looney (1960s - date not known) IMD created second symbol brand Shoprite for c&c customers (1966) Musgraves expand into frozen food delivery
Brand Content	Level of brand evolution & management	
Brand Evolution	Level of sophistication and scope of indigenous owned and managed brands	Basic Brand. Identified symbols and cash and carry outlets
Brand Management	Locus of brand management within organizations and nature of brand management activities	Marketing capabilities recruited into the industry particularly group buying offices. Brand management mostly tactical and outlets seen more as fascias than retail brands. Extensions to brand portfolio signals emergence of multi-brand architecture
Industry Structure	The structure of the industry including the presence of strategic groups and emergence of organizational forms	Fragmented, regional industry. Buying groups, symbols and cash and carries new organizational forms and strategic groups. Scope of range and customer base expands through innovation. Consolidation around buying groups
Industry Architecture	The level(s) of the industry whose brands had the strongest bond with customers. Indicative of bargaining power and architectural advantage	Suppliers have strong relationship with consumers sustained by advertising and emerging brand management techniques. Suppliers generally larger than wholesale or multiple customers. Buying groups start to exert countervailing power through scale and restricting supplier interface with customers

Wholesale Grocery Narrative Analysis

Year	Significant Contextual Events and Factors	Other Context Factors			Industry Narrative	Brand Content		Industry Structure	Industry Architecture (Guarantor of Quality)
						Brand Evolution	Brand Management		
1945 - 1950s	*Increased supply of food products in market in post war era. Emergence of supermarket shopping*	Free Trade Policy	Branding Expertise in advertising agencies	RPM	Retailers form buying cooperative ADM	Proto Brand	No evidence of active brand management beyond sales generating activity and some tactical activity in corporate reputation management. Lack of marketing or branded capability within the industry. Brand perceived to reside only in suppliers' product brands. Suppliers engage in sales support & advertising to pull brands through channel.	Highly fragmented industry (258 wholesale grocers in 1956.11 firms 23% of turnover). Local & regional. Barriers to entry low. Fragmented supplier and customer base Scope of business ambient foods. Perception of role simply wholesale distribution. Retail cooperatives create substitute competition. Retailers exert control through use of multiple wholesalers. No national retail chains. Power of suppliers due to scale and consumer demand for proprietary brands	Suppliers' brands.
1953									
1955	Retail Prices (Display) Order								
1957	Fair Trade Commission Report								
1958	Repeal of resale price maintenance. First Groceries Order			Restrictive Practices (Groceries) Order	Retail co-ops secure wholesale terms H.Williams opens cash-based supermarket				
1959	Cash based retailing								
1960	Voluntary group retailing concept imported from abroad.				EDL launch Golden Goose	Basic Brand to identify symbols and cash and carry outlets	Symbols and cash and carries managed more as fascias than brand. Introduction of marketing expertise, particularly into central offices, brings enhanced understanding of branding. Brand management more tactical than strategic with focus on point of sale including fascias & price communications. Multiple trading-brand architecture starts to emerge.	Highly fragmented - still 222 wholesalers in 1966 serving 13,818 retail customers. Introduction of symbol retailers grows to 1,402 by 1966 (+193% vs. 1964). Buying groups and symbol retailers create new strategic group, and multiple retailers a second. New organizational forms. Alliances of wholesalers around symbols locus of early consolidation. Heterogeneous customer base with respect to independence and scale creates segmentation of symbol group propositions and delivered and cash based wholesaling. Expansion of wholesalers influence into wider range of products	Suppliers' brands
1961	*Cash based wholesaling*				Musgraves open cash and carry				
1962	*Growth of supermarket shopping and self-service retailing*				VG launched by IMD				
1963					SPAR brand launched by AWL, MUM & Looney				
1960s	*Social change (e.g. mobility and urbanization)*				Shoprite brand created for cash and carry customers				
1966					Musgraves distributes frozen foods nationally				
1967	*Central billing service offered by wholesalers*				Mangans join Mace Group	Basic Brand. Identifies and differentiates symbols, cash and carry, own brand.	Increased understanding of the role of B2B and retail branding attracting retailer customers and in building their customer experience. Senior management main interest in naming & own brand strategies. Management of retail brand range and assortment (including 'must have', secondary, own brand, Irish and international brands) dictated by buyers.	Symbol group trading and cash and carry dominant form of wholesaling. Symbols account for 38% retail market share in 1969 dropping to 31% by 1979 as multiples share reaches 44%. Little differentiation between symbols amongst consumers. Consolidation results in fewer, larger wholesalers and buying groups with wider geographic reach.	Suppliers' brands
1968	*Growth in out of home eating drives growth in foodservice.*				SPAR wholesalers launch Value Centre				
1970	*Building of shopping centres impacts on high street retailing*				VG changes group name to IMD reflecting increased scope				
1971	Currency change - Decimalisation - undermines consumer price awareness				AND form facilitating growth of Mace				

Year	Significant Contextual Events and Factors	Other Context Factors			Industry Narrative	Brand Content		Industry Structure	Industry Architecture (Guarantor of Quality)
						Brand Evolution	Brand Management		
1972	FTC express concern regarding impact of own brand products.						Use of marcoms to reassure on value, build footfall and differentiate from multiples & other symbols.	Over 60% of wholesale outlets cash and carry by end of decade - total wholesale outlets ~190.	
1973	Accession to EEC				Accession to EEC increases brands available in market			Wholesalers start to divide operations into retail and wholesale divisions to match customer needs. Facilitates expansion of industry boundaries into foodservice and non-food distribution.	
1973	FTC ban below cost advertising	EEC Membership	Branding Expertise in advertising, brand and design agencies	Restrictive Practices (Groceries) Order			Use of own brand to exert countervailing power on suppliers becomes more intensive.	Suppliers try to retain their power through the primacy of their brands. Undermined by multiples' price wars.	
1974	Inflation triggered by Oil Crisis.				Stork margarine replaced by VG margarine	Basic Brand. Identifies and differentiates symbols, cash and carry, own brand.			Suppliers' brands
	Multiples price wars intensified by mass media activities								
1975	Gay Byrne 'Shopping Basket' escalates price wars						Focus of brand management starts to move from B2B focus to encompass more active B2C engagement.		
1978	Collective action by wholesalers				Wholesalers successfully boycott Willwood Group			Below cost selling by multiples augmented by influential broadcasting reduces industry profitability and accelerates contraction in the independent customer base. New type of customers including forecourts and foodservice, plus higher margins on extended product mix partly offset this.	
1979	Court ruling establishes definition of net invoice price				IADT formed				
1979	Tesco first foreign multiple to enter market				Musgraves review symbol group strategy at meeting in Killarney				
1980	*Increase in household number & fall in household size create changing requirements for retailing & foodservice including trolley & convenience shopping. Political uncertainty and multiple changes in government. Economic climate generates need to austerity Scanning, enhanced ordering, billing and delivery systems in distribution*				SuperValu & Centra brands launched	Augmented Brand. Positioning and personality.	Increasingly strategic approach to brand architecture and retail brand management. Market segmentation reflected in branding strategy with house of brand strategy established as dominant model Rebranding and repositioning of symbol groups reflects changing customer needs for convenience, choice, improved quality and customer experience. Reputation and corporate brand management becomes increasingly sophisticated and important. Brands used by industry leadership as a weapon in battles with suppliers for wholesale differential.	Leading wholesalers increasingly dominate the industry as consolidation of the industry continues although no significant change in number of outlets. Geographical reach of wholesalers rather than only symbol groups increases eg SuperValu enters Leinster. Boundaries between multiples and larger symbol operators and brands becomes less defined. Intensifying competition between wholesalers to attract retailers and foodservice customers to their brands. Multiples increase their power and market share grows to ~60%. Independent and symbol group outlets and market share falls.	Suppliers' brands. Retail brands challenge for role.
1980s					Growth of own brand ranges				
1981					Generic products enter market				
1983					BWG acquire MNC and consolidates brands				
1984					IDL acquire BWG and Musgraves Garveys				
1985					Supervalu positioned as voluntary multiple brand				
1986	Intensity of price competition and difficulty in enforcing ban on below cost selling creates				Tesco withdraw from Ireland				
1987	lobby for ban on below cost selling and limits to retail store size.				Convenience brands start to launch. H.Williams collapses				

Year	Significant Contextual Events and Factors	Other Context Factors			Industry Narrative	Brand Content		Industry Structure	Industry Architecture
						Brand Evolution	Brand Management		(Guarantor of Quality)
1987	Groceries Order amendment introduces ban on below cost selling	European Commission Membership	Branding Expertise in agencies. Increasing indigenous capability at functional & senior management level.	Restrictive Practices (Groceries) Order	Musgraves / Aviette acquire H.Williams stores trades as Supervalu	Augmented Brand. Positioning, personality. Corporate branding evolves from corporate identity	Brand management evolves in tandem with growing recognition of need for wholesalers to influence consumer experience rather than leaving this to affiliated retailers. Retail branding techniques used to create distinct customer experiences. Brand becomes a senior management responsibility, with tactical enactment at more junior level. Brand measurement techniques, marcoms strategies and executions become sophisticated. Brand architecture, with multiple symbol brands & formats, facilitates segmentation & geographic competition between symbol groups. Internal branding starts to emerge as mechanism to engage employees with customer and consumer experience and integrate acquisitions' employees. Corporate brand has forward and backward facing roles in value chain but is generally unknown to consumers and isolates retail brands from corporate level influences. Emergence of delivered foodservice brands extends B2B brand reach.	Wholesaler outlets declined by around 50% and industry concentration increased with six wholesalers accounting for almost 80% of the market and retailer base continued to decline. Bespoke forecourt retail formats addressed a growing segment of the market. Intensity of rivalry intensified as wholesalers competed for best retail operators including remaining independent retail chains and profitable foodservice customers. Retail contracts became more stringent for relationship brands, tightening control over the sales environment. Wholesalers competed with multiples and discount brands for consumers. Multiple's market share fell below 1987 levels, then started to resurge achieving over 55% share. Wholesaling and retailing divisions business models diverged with increasing convergence between practices of wholesalers and multiples and blurring of boundaries between them. Musgraves and BWG expanded internationally, increasing their overall buying power. Large indigenous branded suppliers accelerated their consolidation bringing many leading brands under single ownership.	Suppliers' brands. Retail brands challenge for role
1994	European Commission established				Musgraves purchase L&N				
1995	*Groceries Order creates effective price control.*				Tesco re-enter Irish market.				
1997	*Planning regulations limit growth of multiple floor space.*				Eurospar introduced as supermarket format				
1997	*Convenience shopping and out of home eating continue to grow fuelled by dual income families.*				Musgraves start central distribution				
1998					Gala Retail services launch concept for independent retailers				
1998	Launch of TV3 ends RTE monopoly on TV advertising.				SPAR Express forecourt format launched				
1998	*Population grows and household size falls*				Discounters Aldi & Lidl enter with new approach to brands				
1999/ 2000	*Increase in Internet for business and personal purposes*				MBO of BWG from Pernod Ricard				
2000	Over 95% of petrol station forecourts have a store				AND/Mace & NWGA merge to form Stonehouse Marketing				
2000	*Central distribution*				Musgrave Foodservice established as delivered business				
2000	Competition & Mergers Review Group (2000), the OECD (2001) and the National				BWG Caterserve launched				
2001	Competitiveness Council (2004) all recommend repeal of Groceries Orders.								

Year	Significant Contextual Events and Factors	Other Context Factors			Industry Narrative	Brand Content		Industry Structure	Industry Architecture (Guarantor of Quality)
						Brand Evolution	Brand Management		
2004 / 2005	*Buoyant economy facilitates growth of convenience and out of home eating behaviour.*	EC Membership	Branding Expertise in agencies & senior & line managers	2006 Competition (Amendment) Act	Musgraves acquire C&R Foods and Variety Foods	Augmented Brand as standard.	New leadership accelerate a more explicit, formal approach to brand, bringing more expertise in house.	Wholesalers continue to consolidate locally and expand into international markets. Scale of operations signals common ownership to media, quangos, government and consumers. Barriers to entry are high and underpinned by heavy investment in marcoms, innovation and training. New types of leader in industry. Multiple and discounter market share grows at expense of independents. . Consolidation in food supplier base continues.	Retail brands and suppliers' brands (depending on category)
2005	Minister announces intention to abolish Groceries Orders				Launch of Musgrave MarketPlace		Brand management starts to encompass functions not previously considered relevant to brand building, driving closer alignment between business models, brand architecture and branding activities. Emergence of digital marketing activity on mobile & PC platforms.		
2005	Eddie Hobbs identifies Musgraves as company behind big retail brands				Musgraves initiate roll out of brand development initiative	Evolved Brand begins to emerge			
2006	Competition Authority compile report on grocery distribution				Pettits joins SuperValu				
2006	Repeal of Groceries Order								
2007	Banking crisis causes global economic crisis.				Musgrave Retail Partners rebrand to reflect focus on differentiated retail brands	Evolved Brand amongst thought leaders.	Brand becomes firmly established as a senior management priority and a critical element in surviving in a challenging sales environment.	Highly concentrated industry with five companies accounting for 95% of turnover. Significant decline in wholesaler outlets - down to 93 by 2011. Foodservice distribution more fragmented with 56 active operators. 98 wholesale outlets in 2010.	Retailer brands (multiple and wholesaler owned)
2008	*Financial crisis and recession increase consumer focus on value for money. Brand sophistication facilitates move to own brand and tertiary brands*				BWG acquire Mangans and consolidate operations		Innovation and rebranding of symbol group brands maintains momentum. Branding is embedded within operational routines and enacted throughout internal and external value chain relationships and activities. Brand becomes part of the vernacular, central to service and product innovations, communications strategies and employee behaviours. Branding expertise exported to build overseas business. Internet and social media increasingly important in brand development, communications and reputation management.	Scope of activity includes food and non-food wholesaling and foodservice distribution. Retail outlet decline continued, falling to under 7,000. This somewhat offset by increased activity in TSNs. Multiple share (excluding SuperValu) at 68%. Nearly half of consumers perceive symbols as sign of common ownership. Accelerating consolidation of Irish supplier base, and shift in global suppliers to UK control of sales and marketing, undermining wholesalers relative buying power for brands. Own brand share increased to 35% by 2011.	
2009		European Union Membership			Tesco 'Change for Good' signals long lining of distribution				
2009	*Competition Authority increase intervention of supplier mergers such as Kerry Foods and Breeo*				Centra identified as leading quick service restaurant brand				
2009					Barry Group launch Buy Lo as a discount symbol proposition				
2011	General election sees significant change in government				Superquinn acquired by Musgraves				

APPENDIX Q TELECOMS NARRATIVE ANALYSIS

The telecoms narrative is structured in the same way as the wholesale grocery analysis. The horizontal axis of the table displays the empirically observable elements of the exploratory framework and the nature of each heading is explained in the table below. The vertical axis represents the timeline of the case narrative facilitating an understanding of how the process of change unfolded over time. The table below explains each element in the table and gives a truncated example using data from 1998 to 2000.

Column Headings	Explanation of Column Content	Example
Date	Either a specific date of an event, or a range of years during which a trend or change emerged	1998—2000
Significant Contextual Events and Factors	Changes in political, legal, socio-cultural, economic and technological environment. *Italics indicate factors that emerged or became important across specific time period*	Political pressures for deregulation and increased public ownership of shares plus the power of the unions influence the approach to the sale of Telecom Éireann. Globally mergers and acquisitions and MVNOs start to emerge. Confusion around benefits of emerging telcos. Growth of the Internet
Other Contextual Factors	Factors which influenced the institutional or task environment across the specific time period.	EC dominant influence in the regulation and levels of competition. ODTR responsible for local regulation. Rapid introduction of technologies requires marketing and brand to commercialise them and deliver revenue. Brand expertise most developed in agencies with increasing capabilities amongst telcos managers
Industry Narrative	Key events that occurred within the industry or value chain with specific relevance to brand and change	(1998) Lead up and impact of deregulation of market (1998 -2000) MNOs acquire most of retail channel. (1999) Sale of Telecom Éireann and rebrand to Eircom. NTL acquire Cablelink and Spirit launch VoIP service. (2000) CPS and number portability introduced. Mobile users exceed fixed line and Eircell and Esat Digifone sold to overseas companies.
Brand Content	Level of brand evolution & management	
Brand Evolution	Level of sophistication and scope of indigenous owned and managed brands	Augmented Brand. Positioning and personality in addition to basic brand. Corporate brand evolves from corporate identity.
Brand Management	Locus of brand management within organizations and nature of brand management activities	Senior managers are actively engaged in brand strategy but tactical activity handled at more junior level. Competitive activity stimulates the evolution of brand management techniques.
Industry Structure	The structure of the industry including the presence of strategic groups and emergence of organizational forms	Deregulation catalyses fragmentation of the industry. Strategic groups (i.e. mobile, ISP, new telcos) seen as separate industries. Start to converge through acquisition and growth of data market. Leading handset suppliers increase their share of market.
Industry Architecture	The level(s) of the industry whose brands had the strongest bond with customers. Indicative of bargaining power and architectural advantage	Telco brand retains the trust of customers and sustain relationship through marcoms. Handset suppliers start to challenge this relationship exerting pressure on telcos for support whilst telcos heavily subsidise handset sales.

Telecoms Narrative Analysis

Year	Significant Contextual Events and Factors	Other Context Factors				Industry Narrative	Brand Content		Industry Structure	Industry Architecture (Guarantor of Quality)
							Brand Evolution	Brand Management		
1922	Free State Established. Department of P&T assume responsibility for telecoms.	Free Trade Policy	Technologies understood by customer	Brand expertise in advertising	Department of Post & Telegraphs	P&T established as State telecoms monopoly	Proto Brand	No evidence of active brand management. Lack of marketing or branded capability within the industry.	State monopoly on supply and distribution of telecoms. No threat of new entrants - barriers to entry high. Underinvestment on new technologies. Telephone density and call rates relatively low. Demand outstrips supply with long waiting lists for telephones. Telecoms extend from essentially urban commodity to national reach.	Telco
1940s	WWII stimulates growth in demand for telecoms					Growth of demand during WWII				
1945	Investment in telecoms infrastructure commences					Government approves plans to upgrade system		Civil servants manage relationships with stakeholders.		
1948	Irish Republic established									
1958	*Social change and increasing mobility*							No perceived need to brand or market services.		
1970	*Telecoms perceived to provide an essential service*					Telecoms service operating at a loss				
1970s	*Start of deregulation of telecoms and utilities abroad.*	EEC Membership	New technology require brand to make them customer relevant	Branding expertise in advertising, design and brand agencies		Interconnect on international calls	Proto Brand	Little emphasis on marketing or brand and lack of marketing or brand capability within industry. Some tactical brand management and corporate reputation management but restricted to basics such as stationary and fascias.	State monopoly on telephony and telex in domestic market with minimal competition for B2B business services. Political pressure attenuates high staffing levels. Demand outstrips supply, waiting list grows to 60,000. Weak supplier or customer power. Poor profitability - operates at a loss.	Telco
1973	Accession to the EEC									
1975	*Media highly critical of service and attitude of P&T*					Telecoms account for 95% of P&T deficit				
1976	PE Consulting Report									
1978	Post & Telecommunications Review Group					40,000+ people or businesses on waiting list				
1979	*Growth in households due to demographic changes*					An Bord established. Michael Smurfit chairman				
1980	Consultation Green Paper									
1981	White paper establishing An Bord Telecom					Name Telecom Éireann introduced				
1983	*Increasing use of brand in services & utilities*					Telecom Éireann identity created				
1984					Dept. of Comms	Telecom Éireann take over telecoms system	Basic Brand. Identifier of company, products & services.	Brand management more tactical than strategic, with little senior management involvement. Marcoms support product innovation, service and marketing initiatives.	Semi State company with monopoly on domestic and mobile market. All domestic traffic on lines leased from Telecom Éireann. Basic telephony & rental account for ~90% of turnover. Household penetration grew to > 70% & waiting lists erode. Barriers to entry high & competition restricted to international call services with <5% market share.	Telco Brand
1985	Introduction of mobile telephony					Eircell launched				
1986	*Increase in household numbers, and growth of international businesses in*					RTE cable operators consolidated into Cablelink				
1987	*Ireland increases demand for telecoms purposes*					Last manual exchange closed		Many MBA graduates in Telecom Éireann who understand concept of brand but lack operational branding capabilities.		

Year	Significant Contextual Events and Factors	Other Context Factors				Industry Narrative		Brand Content	Industry Structure	Industry Architecture
							Brand Evolution	Brand Management		(Guarantor of Quality)
1987 1988 1989 1989 1990 1991 1992 1992 1993	*EEC influence on competition law increasingly impacts on Irish market* *Entrepreneurs gain experience e.g. O'Brien wins radio licence in competitive tender, Melly introduces call back service* European Leased Line Directive *Data services evolve - less regulation than telephony* GSM launch in mobile	EEC Membership	Introduction of technologies require marketing & brand to make them customer relevant	Branding expertise in agencies, senior & line managers	Department of Communications	Eirpage joint venture with Motorola Telecom Éireann acquire 60% of Cablelink PostGem ISP launched Start of deregulation of fixed line telephony. Payphones deregulated Esat Telecom founded Customer premises equipment deregulation completed Competition in International call market Telecom Éireann begin brand review	Basic Brand. Identifier of company, products & services.	Brand helps in diversification strategies - including joint venture activities. Proliferation of brands within Telecom Éireann with lack of senior management influence on over-riding brand architecture. Brand architecture hybrid of corporate - trending to corporate outside Telecom Éireann. Entrepreneurs and managers within Telecom Éireann with greater understanding of brand and branding increase brand capability	Supplier base fragmented despite CPE liberalization. Telecom Eireann engage in joint ventures and alliance to diversify into data. Proliferation of products facilitates diversification, expansion driven by technological innovation. Mobile telephony, data & cable emerge as potential substitutes. Data subject to less regulatory control & more competitive but mobile state monopoly. Low adoption of mobile service due to restricted coverage & high cost of calls and handsets. Supply of fixed lines lags demand but excess capacity on mobile networks Telecom Éireann Telecentres increase range of handsets. Start of independent handset & service retailers	Telco Brand
1994 1990s 1994 1995 1995 1996	European Commission established *Population grows and household size falls* *Increase in Internet for business and personal purposes* Telecommunications (Miscellaneous Provisions) Act	European Commission Membership				Launch of Esat Telecom brand Entrepreneurs in telecoms & phone retailing Competition in international & long distance calls Eircell set up as separate company within Telecom Eireann Esat Digifone awarded second mobile licence Rebrand & relaunch of Eircell	Basic Brand identifies & different-iates products & emerging strategic groups & operators.	Increasingly strategic concern driven by brand orientated leaders such as Denis O'Brien, Alfie Kane and Stephen Brewer. Increase in branding expertise, often recruited from other services & FMCG, within the industry although more marked in mobile industry than fixed line. Operational management becomes more senior. Proposition, product and retailer brands begin to emerge. High levels of marcoms to support ongoing innovation, launch & relaunch brand initiatives. …	Fixed, mobile, cable and data perceived as distinct strategic groups (or industries) within industry & by customers. Growth in all stimulated by innovation & competition. High barriers to entry lower with phased liberalisation. Fragmentation of fixed commences although Telecom Éireann retain >95% market share. Fixed line brand competition between Telecom Éireann and 'new telecoms' operators' brands, fuelled by Esat Telecom Adoption of mobile and data accelerates in B2B & consumer markets. Mobile brand wars signalled by Eircell rebrand & tender activity for second licence…	Telco brand. Handset brands begin to challenge for the role

Year	Significant Contextual Events and Factors	Other Context Factors				Industry Narrative	Brand Content		Industry Structure	Industry Architecture
							Brand Evolution	Brand Management		(Guarantor of Quality)
1997	ODTR established to regulate industry	European Commission Membership	Rapid introduction of new technology requires marketing & brand to make them customer relevant	Branding expertise in agencies, senior & line managers	Office of the Director of Telecommunications Regulation	Eircell launch Ready to Go accelerating growth of mobile Launch of Esat Digifone Infrastructure monopoly lifted Telecom Éireann buy Indigo Telecom Éireann instructed to sell Cablelink Personnel transferred to TE from KPN & Telia	Augmented branding to build positioning & personality emerges in mobile	... Market segmentation reflected in brand proliferation within predominantly corporate brand architectures. Internal branding begins to emerge as mechanism to engage employees or to bring about cultural change.	.... Escalates with launch of Esat Digifone, pre-pay brands & intense retailer competition. Mobile penetration grows by 900% to >400,000 consumers. Handset suppliers exert countervailing pressure on telcos & independent retailers. Bidding war for Cablelink underscores revenue potential of industry. Growth of text on mobile & data, including email and the Internet, signal a substitute for fixed line telephony. Domestic penetration of Internet ~5% by 1998 & PCs ~18%.	Telco brand. Handset brands begin to challenge for the role
1997	*High telecoms usage & influx of MNCs into Ireland fuel growth in telecoms traffic*									
1997	*Media fuels debate on competition in industry*									
1998	*Launch of TV3 ends RTE monopoly on TV advertising*									
1998										
1998						Deregulation of fixed line market on 1st December MNOs acquire most of the retail distribution channel Privatisation of Telecom Éireann, formation of ESOP & rebrand as Eircom NTL acquire Cablelink Spirit launch VoIP telephone service Six branded operators active in domestic telecoms market CPS and number portability introduced 2.5 million mobile users. Mobile users exceed fixed Esat Telecom & Esat Digifone sold to BT, & Eircell to Vodafone	Augmented Brand. Positioning, personality. Corporate branding evolves from corporate identity	Brand management coevolves with increased competitive activity, marketing sophistication & high investment in marcoms. Brands managed within & across customer segments to create and maintain legitimacy in fragmenting market. Customer segmentation strategies influence brand and marketing structures within local operating companies Senior managers engaged, but tactical activity handled by junior managers. Increased usage of internal branding techniques. Brand measurement undertaken but quite rudimentary.	Industry fragments stimulated by deregulation, entrepreneurial action & marketing, & differential strategies of strategic groups. Simultaneously convergence begins between segments driven by growth in data market. Fixed & cable operators acquire or develop data & ISP companies. Eircom market share drops to 80%. Intense marketing and marcoms activities across all strategic groups in the industry. Mobile penetration grows from 15-51% through intensive marketing, channel activity & handset subsidy, fuelling demand for handset brands & undermining profitability of the industry. MNOs acquire retailers to protect revenue. Leading handset suppliers increase their share of market. Eircell act to stop entry of MVNOs. Global operators enter through alliances & acquisition.	Telco brand. Handset brands challenge for the role
1998-2000	*MVNOs emerge in Europe*									
1999	Political pressures to increase share ownership & demands of unions influence Telecom Éireann sale strategy									
1999	*Increase in Internet for business and personal purposes*									
1999	Mergers and acquisitions in global market. Vodafone becomes global brand									
2000	*Customer confusion fuelled by inadequate differentiation between proposition, and fear of switching acts as barrier to change.*									
2000										
2000										

Year	Significant Contextual Events and Factors	Other Context Factors				Industry Narrative	Brand Content		Industry Structure	Industry Architecture
							Brand Evolution	Brand Management		(Guarantor of Quality)
2001	Eircell win case against Cellular 3 in High Court	European Commission Membership	Rapid introduction of technology & industry convergence requires marketing & brand to make them customer relevant	Branding expertise in agencies, global, senior & line managers	ODTR	Launch of Meteor, rebrand of Eircell to Vodafone Tender for 3G licences	Augmented Brand. Corporate & internal branding Start of brand as an organizing principle	Global MNOs accelerate more formal, disciplined approach to brand measurement & management. Emphasis on maintaining local dimension to brand expression. More explicit use of internal branding techniques drawing non-marketing managers into process. Role of brand equity in creating value necessitates more senior brand managers. Increasingly sophisticated brand measurement techniques. Brand architectures & guidelines controlled by senior local and global managers. High levels of marcoms activity. Emergence of digital & Internet as a sales, marketing & brand building tool	Deregulation triggers intense marketing activity between brands in fixed domestic & B2B segments, fragmenting market. Rebrand of Eircom fails to have sustained positive impact on reputation but customer confusion, inadequate differentiation and fear of switching acts as barrier to exit. Eircom retain 80% share despite competition. Primacy of data accelerates. Lack of fixed broadband infrastructure & lifestyle changes stimulate demand for mobile, cable & satellite data. Household penetration of broadband only reaches 2.5%. Consolidation of cable segment serving >500,000 customers. Mobile competition, constant product innovation & marcoms support stimulates market and expands base without driving down ARPU (remains at €47-48 throughout). Strength of Eircell & Esat Digifone equity transferred to Vodafone & O_2 sustaining market positioning & acting as barrier to Meteor & Three. Mobile penetration > 100% Innovation & marketing activity further strengthens handset brands' relationship with customers exerting strong pressure on telecos who continue to subsidise them. Content emerges as driver of choice. Start of convergence between fixed, mobile and cable strategic groups. Growth of 'brand society' fuels desire for lifestyle brands.	Telco brand. Handset brands strong challenge for the role
2001	*Global brands increasingly replace local brands*				Commission for Communications Regulation (ComReg)	Rebrand of Digifone to O_2 & Esat to Esat BT Vodafone EmailAnywhere & O_2 Blackberry redefine mobile data market Eircom sell off non-core assets subsequent to Valentia Digiweb introduce satellite broadband CPW only significant independent retailer Launch of 3G by Vodafone & O_2 UPC acquires NTL. Esat BT rebranded BT Ireland Launch of Three and acquisition of Meteor by Eircom Perlico reposition as low cost operator Vodafone launch new brand essence internally & externally UPC acquire of Chorus Telefónica acquire O_2			
2002	ComReg replaces ODTR as regulatory body									
2002	*Celtic Tiger economy. Conspicuous consumption of brands. High levels of growth in households particularly 1 & 2 person. Immigration results in population growth & emergences of ethnic segments*									
2002-2004										
2002										
2003	Forced introduction of FRIACO to stimulate broadband penetration									
2003	FMNP introduced									
2004	*Eircom repeatedly designated as USP*									
2004	Mobile & fixed line ownership equal									
2005	*Growth of VoIP, digital content& WiFi hotspots*									
2005	*Internet access increasingly seen as necessity by business & consumers. Social network brands emerge across computer & mobile platforms.*									
2005										
2005	*Becomes important on political agenda*									
2006										

Year	Significant Contextual Events and Factors	Other Context Factors				Industry Narrative	Brand Content		Industry Structure	Industry Architecture
							Brand Evolution	Brand Management		(Guarantor of Quality)
2007	Banking crisis causes global economic crisis	EC Membership	Rapid introduction of technology & industry convergence requires marketing & brand to make them customer relevant	Branding expertise global brand teams, local senior & line managers, & agencies	Commission for Communications Regulation (ComReg)	Tesco Mobile MVNO launches	Evolved Brand amongst industry & thought leaders	Ownership of brand at a senior level with tactical management often a more junior responsibility. MNCs control their brand architectures & exert significant control on brand development & communications in Irish Operating Companies. Challenges of marketing environment increase pressure on brand managers to differentiate, maintain positioning, avoid commoditisation & value erosion. Brand used to consolidate acquisitions & optimise marketing efficiencies. Brand engagement becomes aligned with customer satisfaction management. Internet and social media critical in brand development, sales & marketing activities, communications and reputation management.	Fragmented market —461 operators in 2012, 58 account for 95% revenue. Eircom (USP) has 40% of revenue. Market–53% fixed, 42% mobile, 5% broadcast. Growth of smartphones, WiFi, content, social networks & plus diversification catalyse breakdown of strategic groups as technologies converge. Operators merge primarily through acquisition. Industry boundaries blur, break down and reform. Barriers to entry lower. Voice increasingly commoditised. Robust wholesale markets in fixed & growth in mobile wholesale market. MVNOs intensify competition in mobile. ARPU falls from €45 in 2006 to €29 in 2012 although MVNOs fail to have much impact on market shares (~5% in total). MNO focus moves more towards customer retention activities. Intense competition within all sectors for share in voice & data markets. Economic climate & competition drove down prices. Growth in ecommerce & social media accelerates demand for 'always on' connectivity. Fixed & mobile operators struggle to generate revenue from content. Range of handset brands critical to MNO competition their retail brand architectures. Handset brand, operating system & content key determinants of customer choice.	Handset Brand with emerging challenge from operating system & content providers
2007	*Consumer brand sophistication facilitates brand switching*					Vodafone enter fixed market with acquisition of Perlico				
2008	Next Generation Broadband identified as political priority by government					O_2 wins iPhone exclusivity. First Android phone launched				
2008	*Recession impacts on call and data usage driving down prices. Increase in emigration.*					Vodafone launch Vodafone at Home (fixed line product) & O_2 fixed line for SMEs				
2009	*Fast data transfer enabled by PANS & growth of WiFi shape usage*	European Union Membership				BT Ireland customer base acquired by Vodafone				
2009	ComReg rule that Eircom cannot bundle Meteor with fixed line					Digiweb acquire Smart,				
2010	*Negative media reporting on quality & prices in industry.*					Singapore Technologies Telemedia & ESOP acquire Eircom				
2010	*Growth in social media accelerates demand for 'always on' connectivity*					Meteor and Eircom operations merged				
2010	General election sees significant changes in government					UPC brand launch. Impacts on important Leinster market				
2011	National Broadband Plan launched by government					Apple brand value grows as Nokia and Blackberry decline				
2012	*OTT services congest networks & erode profitability*					Eircom examinership April to June				
2012						Samsung Galaxy outsells Apple globally				

APPENDIX R. THE NATURE OF SOCIAL TECHNOLOGY

The term 'social technology' is ambiguous and must be disambiguated before it is elaborated. It was first used by Albion Woodbury Small in 1898 to describe the *"use of knowledge of the facts and norms of social life to bring about rational social aims"* (Wikipedia, 2013). It later became associated with the term 'social engineering' and took on a more psychological and political meaning. In the 21st Century it gained another meaning as a social software or "*the products and services that enable social interactions in the digital realm"* (Chui, et al., 2012). In this thesis social technology is used in the sense defined by economists (e.g. Nelson, 2005; Nelson & Sampat, 2001; North, 1990; and Sugden, 1989) that is as patterned fashions of human behaviour which determine how an activity is done. From an organizational development perspective it resonates with the concept of socio-technical systems (Trist, 1981) which are complex organizational work designs that recognise the interaction between people and technology in workplaces.

Physical (or hard) technologies are associated with natural science, have substance, operate in the physical world and aim to change and control nature and substance (Zhouying, 2005) whereas social (or soft) technologies are associated with social sciences and are intangible lacking physical form (Bessant & Francis, 2005; Zhouying, 2002, 2005). They are the process technologies integral to the delivery of services and the commercialization of physical technologies (Zhouying, 2005). Bessant & Francis define them as *"systems of thought, practice and achievement that facilitate the achievement of specific aims"* (2005:98). Examples include accounting processes, insurance, sales and marketing (Bessant & Francis, 2005; Ille, 2009; Zhouying, 2005), monetary and legal systems (Arthur, 2009) and management (Hamel, 2009). Strategic management and business management would also meet this criterion.

Due to the hegemony of physical technology in the literature, social technologies are sometimes referred to as non-standard technologies being *"behavioural phenomena orchestrated for human purpose"* (Arthur, 2009). This is close to Jyuji's explanation of the social technologies with which to control human relationships and psychic phenomena in society (Jyuji, 1955 cf Zhouying, 2005). Social technologies require behavioural change and must be lived rather than acquired (Bessant & Francis, 2005), resolve problems through process, rules, institutions, products and services and unlike physical technologies display strong individuality making them difficult to standardize (Zhouying, 2005). It is an intellectual technology that must be both an operable knowledge system for solution of problems and provide a service to social change or economic development, its main technical parameters being human, social and cultural factors. It should be able to *"present, mold and affect changes through human cognition and actions in the subjective and objective world"* (Zhouying, 2002:2). They are full of latent possibilities which enable flexibility and creativity in production, marketing and profit making (Dron et al., 2011) becoming standardized, regularized

and formalized into mechanisms, rules or systems (Zhouying, 2002). Thus they bring institutions into a theory of production as they encompass the routinized behaviours shaped by prevailing institutions. Therefore much of what is discussed as institutions in economics and social science is more generally about social technologies, implicitly or explicitly (Nelson, 2005; Nelson & Sampat, 2001). Social technologies only become institutions when they have become the standard and expected thing to do in a specific context and thus the most attractive, although not necessarily the most efficient, way to get things done (Nelson & Sampat, 2001; Sugden, 1989).

The potential of new technologies requires know-how and skills to operate them and make them useful and its implementation requires organization and management. The impact of these managers can make enormous differences to the effectiveness of these technologies (Nelson, 2005). Durlauf and Blume (2008) argue that the fundamental unit of technology can be regarded as the technique, close to Nelson and Winter's (1982) concept of routines which are useful vehicles for social technologies as they dictate the division of labour within the organization and the economy (Nelson, 2005). Social and physical technologies coevolve (Nelson & Sampat, 2001) but physical technology drives the evolutionary process as it is easier to specify, maintain, replicate and experiment with (Nelson, 2005). Finally, Nelson (2005) observes that technology, including social technology, evolves in a path dependent manner.

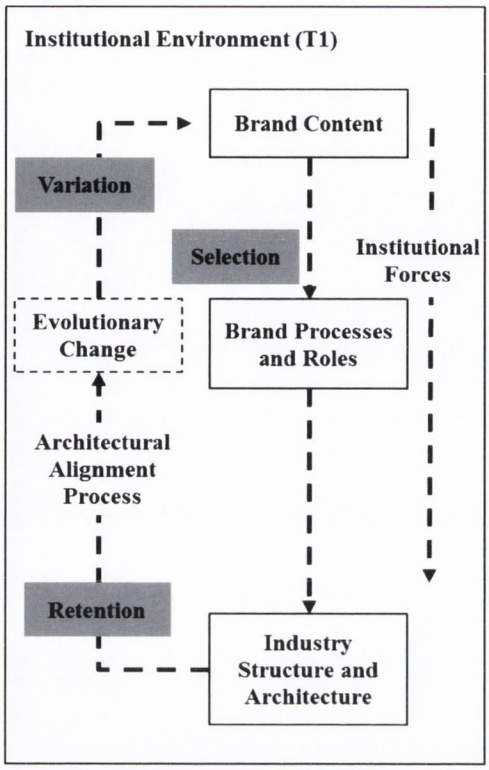
Some of the core characteristics of social technologies are summarised in the table below.

Social Technology
Basis of institutional innovation – creative and flexible to use. Latent possibilities.
Coevolve with physical technology (which is driver) and integral to its delivery
Dictate division of labour in organizations and economic activity
Diffuse across industries and consumer groups
Display strong individuality - difficult to standardize
Encompass routine behaviours - Fundamental unit is technique
Hard to acquire because require behavioural change
Implementation by management results in variation in effectiveness
Process of applying creative thought in a way that becomes mechanisms, rules or systems
Not always most efficient way to get things done
Requires behavioural change
Resolving problems through process rules, institutions, products and services

APPENDIX S ALIGNMENT AND FRACTURE

Wholesale Grocery 1960 - 1987

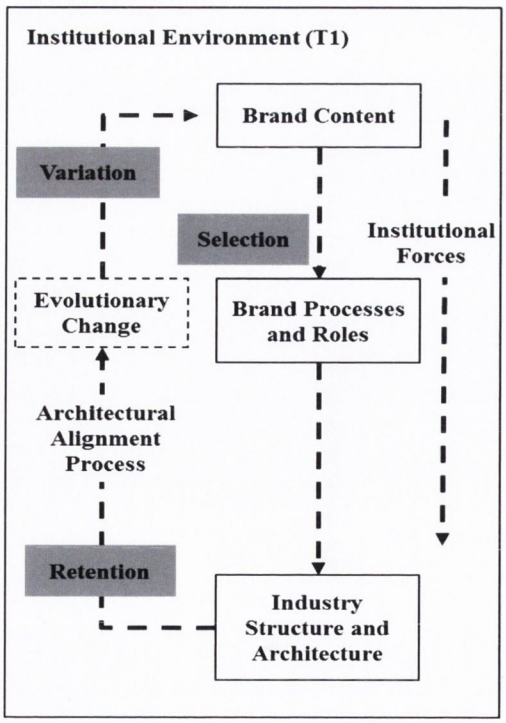
1960 - 1966



T1

Institutional Environment 1960: Groceries Orders (1956). Government concern about food prices. Urbanization, growth in infrastructure. New distributive technologies. Move from traditional to supermarket shopping. Move from credit to cash in wholesale and retail transactions. Branding expertise exogenous to industry.
Brand Content: (Very) basic brand – fascias (names and identifiers) e.g. Golden Goose, Musgrave's Cash and Carry, SPAR. Limited marketing management capability. B2B relationships.
Brand Roles: Risk reduction and building trust. Differentiation. Sense making. Alliances. Locus for expansion. Horizontal competition. Legitimacy.
Institutional Forces drive: Legitimacy—need a brand to compete. Common brand architectures.
Industry Structure: Fragmented industry consolidating. Local and regional. Retail customers declining. Central Offices. Emergence of new organizational forms. Growth of multiples.
Industry Architecture: Manufacturers bigger than customers. Housewives demand proprietary brands. Power and GOQ with manufacturers.

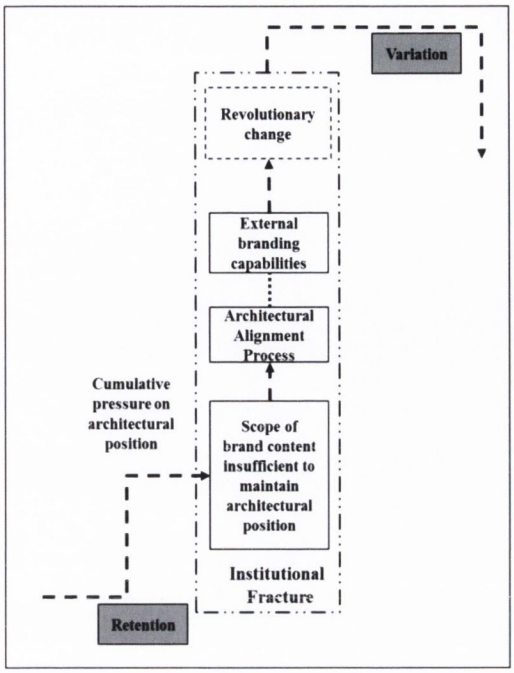
1967-1978



T1 1/2

Institutional Environment : Groceries Orders (1956, 1973, 1978). Government concern about food prices. Urbanization and growth in infrastructure. New distributive technologies. Supermarket shopping. Brand expertise exogenous. Changing shopping patterns. Power of media.
Brand Content: Basic brand–Identifier and differentiator. e.g. Symbols vs. multiples, store design, range, marketing management, advertising.
Brand Roles: Risk reduction and building trust, differentiation, sense making, alliances, locus for expansion, horizontal competition, legitimacy, vertical brand competition. Organizational form.
Institutional Forces: drive legitimacy–need a brand to compete. Common brand architectures.
Industry Structure: Fragmented industry consolidating. Regional. Retail customers declining. Growth of multiples to 44% (risk of disintermediation).
Industry Architecture: Manufacturers bigger than customers. Housewives demand proprietary brands. Power and GOQ with manufacturers.

1978-1981—Institutional Fracture



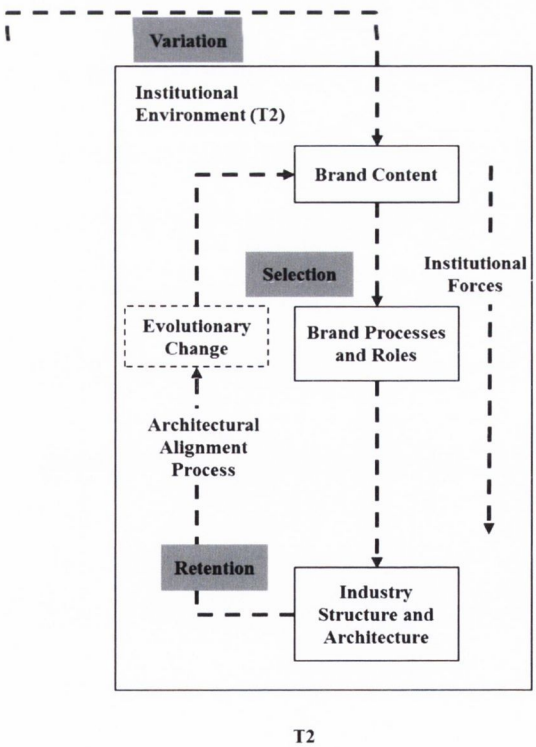
Triggers For Change
Groceries Orders (1973, 1978, 1981). Growth in infrastructure. New distributive technologies. Brand expertise in multiples. Changing shopping patterns – trolley vs. convenience shop. Power of media (below cost advertising and editorial). Collective action (IADT). Political instability.

Pressure to retain best retailers, reframe battle with multiples, create efficiencies, earn hearts and minds of consumers, lobby government.

Trolley and convenience brands. Start to think retail. Create meaningfully differentiated consumer brands.

Emergence of clearly positioned retail brands (SuperValu and Centra; SPAR and SPAR Eight til Late. New contracts–more structured, vertical brand alignment. Imposition of standards.

1982-1987



T2

Brand Content: Augmented brand. Brand as positioning and personality.

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