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OLIGOPOLISTIC MARKETS: TRANSFORMATION OF THE ESSENCE AND FORMS OF COMPETITION

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Relevance of the research. In the past 20 years the markets in the developed economies demonstrate a trend to concentrate economic agents and their consolidation to optimize economic processes, maximize efficient business performance, and pursue robust communication policy. The markets of raw and ready products, international and interregional services and works are shifting towards oligopolization. Therefore, it is important to analyze and characterize the ongoing significant changes in functioning of oligopolistic markets triggered by globalization, hypercompetition, new technological paradigms, development of innovations and consumer behavior trends in the modern economy.

The main aim of the research is to outline the fundamental factors of influence upon changes in modern market performance, intensified competition under globalization and transition to the post-industrial economy summing up the studies in different research areas (strategic management, marketing, the theory of industrial organization, consumer behavior, innovations, etc.); to determine to what extent the oligopolies-stimulating factors encourage intensive competition between market participants and resist cartelization of oligopolistic markets; to describe the main characteristics of the new meaning of the competition model for innovative oligopolistic markets in comparison with the classical model of oligopoly; to identify a trend towards system-wide changes of the form and nature of competition on oligopolistic markets that requires a game-changing review of approaches to the principles of antimonopoly regulation at the modern stage; to systematize and highlight the new substantial content of the competition model on oligopolistic markets and the factors influencing intensified competition on oligopolistic markets.

Research methods: systemic analysis, comparative and normative-legal analysis.

Results. The features of competitiveness within the frame of two models – classical oligopoly and oligopoly changing under the influence of new economic trends – occur in multi-level, poly-structured, inter-sectoral competition of business-systems formed by the market leaders. Cross-competition between the participants of different systems creates the conditions for flexible market conduct.

Conclusions. System-wide changes in the form and nature of competition on the oligopolistic markets, including the innovative ones, initiate the development of new institutional mechanisms and approaches to substantiate the principles and methods of antimonopoly regulation at the present stage.

Key words:

Oligopoly market, competition policy, characteristic of the oligopolistic market, business system, interaction, transformation, technological structure, competition

For the last 20 years – the period of transition to the Fifth technological mode (at the end of XX – the beginning of XXI century) it is characterized by rapid development of electronics and microelectronics, nuclear energy, information technologies, genetic engineering, the beginning of nano- and bio-technologies, satellite and mobile communications, and the Internet. Economic globalization enables fast movement of products, services, people, capital, and ideas) – the development of oligopolistic markets as a reaction to globalization, innovations, branding, and optimization of business-processes has become an apparent trend.

The features of competition at this stage of economic development include a fundamentally new trend of market performance: competition is increasingly shaped up in the form of collaboration, developing business-systems and jointly the building up unique values for consumers and companies. Accordingly, the classical elements of monopoly gradually disappear, being transformed into more diversified com-

plex structures of oligopolistic markets – inter-sectoral, multi-level, flexible business-systems burgeoning around big companies – the market leaders.

From a geo-economic point of view, the classical elements of monopoly, that conduce to decreased output, increased prices and profit and decelerated technological process, began to disappear due to characteristics of the technologies underlying transition of civilization to a game-changing level of technological development [1].

The traditional neo-classical economics defines oligopoly as a form of market structure that constitutes a deviation from the perfect competition model as a result of market failures. The analysis of business-processes on modern oligopolistic markets shows that vertically-integrated business-groups are the outcome of market development in terms of providing the maximum possibilities for innovative activities, economic efficiency and the needs of transfer-technologies, satisfaction of consumer needs in services.

A new integral characteristic of modern innovating oligopolistic markets is an understanding that companies position themselves in the centre of coordinated communities of highly specialized business-units, consolidating economic entities at various levels in related fields of activities into a common, flexible system and reaching a transitory monopolistic position. Large companies – the leading market players – function not as separate economic subjects but as global facilitators of business-systems with a flexible and constantly improving structure, particular degree of institutionalization and a hierarchical pattern, achieving the maximum advantages over other business-systems through a higher efficiency due to cooperation, the synergy co-effect and competitive environment. Such strategic business-models radically change the rules of the game, affecting the market conditions and industry structure and transforming the form of competition, bringing it to the level of business-systems [2–5].

The normal vector of economic development in the globalizing economy, that meets the interests of consumers and the society, provides for accumulating centers of economic development among several large market players with intellectual, financial and innovative resources. Correspondingly, the idea of establishing and strengthening the oligopolistic markets becomes the leitmotiv of economic development. A high level of market concentration does not exclude the intensive competition, and often accompanies it, especially on the markets in innovative and high-technology sectors.

The game theory and economic information theory broadened not only the understanding of substantive forms and mechanisms of cooperation between participants of the oligopolistic markets, but also the methodology of a more accurate and sophisticated analysis of business-practices in terms of their pro and anti-competitive effects [6, 7]. The transaction costs analysis proved the importance of studying the efficiency criteria to conduct market agents [8]; contestable market theory demonstrated that entry barriers is a significant factor for the level of concentration [9], which showed inadequacy of the perfect competition as a benchmark for market regulation. Within the framework of Schumpeterian tradition, the «dynamic competition» is becoming an increasingly essential factor [10] of developing and introducing innovations in contrast to evaluating competitive nature of the market based on classic analysis of the price – the marginal costs ratio [11, 12].

The important factor of establishing strategic competence centers, technology localization and maximizing values for consumers is high efficiency of building up large-scale production on the majority of industrial-technological markets, which facilitates establishing and disseminating of oligopolistic structures. The following circumstances underlie the positive nature of oligopoly development:

- increased company's economy of scale;
- expanding possibilities of risk diversification;

- focusing efforts on new technological areas that support innovative breakthroughs and competitive advantages;
- decreased lead-time for innovative products to be launched to the market [2];
- sustainable consumption safety;
- active branding and marketing strategy;
- the «network effect» of high-technology products (an increased number of product users shows a growing value for a particular consumer and stimulates producers to satisfy the demand) [13];
- high-quality satisfaction of consumer interests and increasing public welfare [12, 14].

Russian scholars have proved that it is competition with import and global operators which forms the major incentives for organic growth of companies and establishing integrated structures and strategic alliances in Russian industries [15, 5].

Importantly, such processes, involving the largest companies, take place, primarily, due to acquiring non-core assets and large-scale diversification of product lines. Product diversification is an important attribute of market structure, a factor underlying company advantages or underrun on the market, which increases the share of the largest companies across the entire industry and intensify rivalry. A growing number of product lines of a single company is an active «weapon» for achieving competitive advantages on both international and domestic markets. On the one hand, it intensifies rivalry between the companies on the product markets, on the other – a limited number of companies concentrate market power by covering increasingly more industry segments [12].

The development of new markets and expanding of the existent ones through intensive involvement in international trade frequently implies company's growth to a level enabling success in competition on the global market. Therefore, large, economically efficient companies constitute an integral condition for achieving national competitive ability in cross-country competition.

Having analyzed the findings of modern studies on macro-economic trends based on classical and neo-classical theories, oligopolistic changes summarized by institutional and neo-Austrian schools, as well as the applied research in market theory, strategic marketing and consumer behavior, management, the authors structurally characterized the significant changes in performance of oligopolistic markets, formed upon the influence of hyper-competition, new technological paradigms and innovative trends in the modern economy. To evaluate the substantive changes on oligopolistic markets several major characteristics are outlined, that describe the performance and the state of the market under the following parameters:

- market structure (the number and the size of firms, the degree of industry concentration, the subject of competition, etc.);
- micro-economic indicators (products, demand, market growth rates);

- competitive environment (exit/entry barriers, economic strategy of market agents, level of prices and pricing policy, price disciplining by competitors);
- specifics of competitive actions (form, competitive resources, object, leading competitive advantage, informational openness);
- consumer influence (object of competition, interaction with the society, role and place in company's activities);
- market efficiency (distribution of resources, production efficiency) [16].

Analysis and synthesis of the academic research under the above parameters enabled the authors to sum up in the Table the basic ideas describing the new content of competitive processes and conduct of market players on oligopolistic markets.

The study confirmed the significant changes in performance of modern oligopolistic markets, creating conditions and incentives for developing competitive oligopoly in comparison with the incentives for non-competitive conduct and motivation for collusion participation.

The major incentive and directions of competition transformation are that, first of all, under the

Table 1. *New Model of Competition on Oligopolistic Markets*

Market characteristic	Oligopolistic Market	
	Classical oligopoly model	Hyper-competitive, innovative market
Factors affecting market development	Market failures are typical	Highly developed, hyper-competitive market
Number and size of companies	Small number of large and medium-size economic entities	Small number of large economic entities – global organizers of business-systems
Market concentration	Highly concentrated homogenous industry	Highly concentrated homogeneous industry; market, however, becomes cross-sectoral
Products	Standardized or differentiated	Customized, situational unique
Market entry conditions	Considerable entry barriers due to oligopolistic control	Tendency to reduce entry barriers due to globalization and domination of «knowledge economy»
Entry factors	Establishing alliances; creating new products; unfair promotion methods, cartels	Company' ability to achieve higher cost-efficiency along common value chain of all participants of business-systems, minimizing the «exit» price
Demand	Elasticity, or low elasticity	Elasticity, or low elasticity (a tendency towards low short-term and considerable long-term elasticity); demand stimulates demand
Availability of information	Mostly to large companies	Widely available to consumers
Economic strategy	High level of «strategic cooperation» between competitors aimed at fixing prices or production output	Unique products and strategy in comparison with competitors aimed at providing unique value for consumers
Price control by competitors	Price range depends on the level of coherent actions of oligopolists (in the form of an open or a latent collusion)	Price range depends on consumer value provided
Price level	Close or equal to monopolistically high prices	Macro-trend to reduce prices through globalization of competition, innovations and availability of information to consumers
Non-price competition	Typical, especially for differentiated products	Dominates (superior brand)
Inter-relations between market agents	Imposing conditions upon suppliers and distributors	Partnership on the basis of joint innovative efforts to provide higher value for consumers
Direction of competition	«Linear» – between oligopolists of a specific industry	«Multi-level» – cross-industry competition of business-systems formed by market leaders
Leading competitive resource	Production inputs	Intangible assets (brand, knowledge, ideas, talents, information)
Object of competition	Market share	Value (consumer)
Type of leadership	Wealth redistribution	Productivity, innovativeness
Achieving competitive advantage	Sustainable comparative competitive advantage	Sustainable comparative competitive advantage is impossible due to globalization of resources supply and rapid development of technologies
Strengthening market position	Economies of scale	Economies of scale + innovations
Cooperation with society	«Tax upon business»	Competitive resource
Efficiency of resource allocation	Resources allocation is below the optimal level due to «strategic cooperation»	Emerging incentives for efficient resources allocation
Productive efficiency	«Strategic cooperation» enables the productive efficiency below the optimal level	Emerging incentives for increasing the productive efficiency
Adaptive efficiency	Irrelevant	High

present technological mode creating and incrementing values are increasingly based on intangible assets: competences, trade marks, know-how, knowledge, developments and ideas [14].

Traditional models of company's competitive success, with expanding and retaining a market niche, are being replaced with a new form: sustainable development of innovative assets supporting competitive ability; the value of such assets is enhanced through development and repeated use; collaborative relationship; social capital (ability to create collaborative networks, the common norms and standards, the level of trust) [17, 18].

In 2006, the Economist surveyed top-managers of the leading companies on the market who emphasized the new performance forms and technologies: collaboration between business-agents at various levels within the system of vertical and horizontal integration [19]. Under complex, brand new technological conditions, technological breakthroughs are impossible without collaboration and building up functional capabilities of companies on the basis of accumulated achievements of different market participants.

A new role of oligopolistic companies, as global organizers of business-systems, is to form the integrated conditions for functioning of their partners, when they exercise synergy effects upon the priority functioning of a business-system. Maintenance of the leadership over competitors is based, first of all, on incrementing intellectual competences, integrating values, and reaction to the social mandate (green economy, bio-system pre-eminence, creating favourable and safe life conditions) [17–19]. Companies tend to cooperate on the market by joint participation in different projects. As a result, the traditional pyramidal structure of chain values is being replaced with integrated networks of competitive and collaborative relations. The concept of «co-competition» is established. Prevailing market conduct is formed on the basis of cooperation between market agents, stimulated by intensifying competition under the conditions of new technological modes and globalization. Dominance and exclusive influence upon conduct of market participants, imposing economic activities upon suppliers and distributors by large companies is receding into the past. The major trend of market conduct is developing partnership based on collaborative innovative activities in order to achieve superior value for consumers [2, 3, 17, 18].

Such type of flexible business-model in the knowledge economy is facilitated by a strengthening trend towards converging industries and cumulating cross-sectoral markets. For instance, synthesis of computer technologies, telephony, new electronic database and data transfer technology, household appliances and connecting specifics radically changes telecommunications markets; achievements in nano- and bio-systems, bio-technological breakthroughs result in cross-fertilization and development of fundamentally new technologies in medicine, pharmaceuticals and life support.

Base technologies are no longer unique for a particular industry – the major technological breakthroughs are achieved by borrowing technologies and adopting them for new objectives of industrial modernization and satisfying consumer preferences (the connected economy principle).

The classical interpretation of oligopoly market – a high index of market concentration (CR) that characterizes weak/sluggish competition and low incentives for its development – is undergoing considerable modifications.

Under the modern dynamic developments, statistical concentration indices for homogenous industries calculated using traditional techniques (CR, HT, HHI, ID, IL) [20] remain only as formal market indicators for describing market structure and they are mostly applicable in merger and acquisition control. Evaluation of possible anticompetitive effects of abusing market power by market players or expose of latent violations in the form of cartels, structural coefficients can only serve as one of possible indicators of violations. The main evidence-based arguments in the line of defence by the competition authorities used in international enforcement practice are built on evaluating companies' conduct and the consequences of their actions for the market and the society [16].

An essential transformation model of modern competition is, primarily, that a degree of market competition is determined by company's conduct rather than a market share. Absence of linear dependency between market structure and the level of competition is determined by the positive trends that enable a new pattern of interactions based on the principle of the «connected economy».

Since the end of the XX century, economic and technological transformations have been conducive to another factor that changes the essence of competition on oligopolistic markets. Development of information-and-communication technologies and the Internet, IT transparency secured supremacy of consolidating consumers over market information, earlier controlled by large companies. The most successful, demonstrating sustainably high prices are the companies that focus their strategies on consumers (ability to offer superior value to consumers) and build up capabilities for achieving and maintaining leadership by expanding customer awareness [21].

As a result, the traditional market of goods in mass demand is replaced with customized products – those adopted to specific customer needs due to a phenomenon of mass individualization of choice. A process of marketing individualization is observed: mimetic marketing, on-line systems of services and sales for obtaining additional benefits and satisfying unique needs of particular customers.

The mega-trend of transition to customer-oriented production is facilitated by development of new technologies (for instance, additive fabrication), enabling economical production of tailor-made products in small quantities with direct involvement of

customers in the process of product development (imitative marketing).

Standardized or differentiated products are being replaced with customized, situational-unique products and direct or indirect benefits as a result of consumption [18, 21–23].

Supply changes on oligopolistic markets have considerable impact upon demand. The latter is becoming increasingly elastic – low short-term and considerable long-term elasticity on innovative markets.

Developments and implementation of innovative products («patent monopoly») are geared to satisfy unique situational customer needs, giving low-elasticity demand. At the same time, sustainable trends on modern markets – rapid technological changes, shortened product lifecycles, transfer-technologies and the need to satisfy customer needs in the «real-time mode», from new areas of activity – stimulate demand and push competitors to overcome monopolistic position of the market leader by launching unique, more innovative products to the market that can better satisfy consumer expectations. As a result, there is a long-term trend towards increasing demand elasticity [24].

The important characteristic of oligopolistic markets in neo-classical economic theory is high, often insurmountable market entry barriers. Along with objective factors associated with the structure of departmental costs (scale economy, high technological entry costs, considerable capital/output ratio, patents restrictions, know-how, etc.), there is a significant adverse effect generated by oligopolistic deterrence – preventing market entry by artificially excessive barriers, a joint anti-competitive position in the form of market division, asymmetric information, price collusions, etc.

On the one hand, the competitive oligopolistic markets, especially in innovative sectors, are inevitably characterized by significant entry barriers, on the other – due to development of information-communications technologies and network collaboration the entry barriers are reduced, while instant access to data bases decreases information asymmetry, which intensify competition at the global scale.

Successful market entry of new players in competitive environment at the level of business-systems to a considerable extent is achieved by cost-efficiency within the common value chain of all participants of a business-system. Innovative management of extended value chains in the modern economy enables companies to become market leaders pushing out less efficient competitors.

New factors for reducing market entry barriers are restructuring value chains (outsourcing), increasing openness of the corporate control markets for foreign participants, intensifying cross-country competition for intellectual capital, product modularization and codification, compatibility, retail concentration and globalization [25].

In this regard, the classical oligopoly model gives considerable possibilities for price control by oligo-

polists (the range of product prices depends directly on the level of coherence between companies operating on the oligopolistic markets of in the form of an open (illegal) or latent (non-prohibited by law) agreement. In the new model, prices to a considerable extent are determined by a supposed consumer value (readiness of consumers to buy goods or services).

At the modern stage, non-price competition dominates. Development and effective management of branded products and corporate brands become an increasingly important method for creating the unique value, increasing competitive ability of companies on the market and the market power of its strategic assets, which objectively intensify competition. Establishing and developing efficient brands and increasing their significance for consumers require considerable investments and can be risky. Only market leaders can afford to create strong brands as a strategic direction of competitive rivalry [26].

Differences of competing in the two described models – classical oligopoly and oligopoly transformed under the impact of new economic trends – are demonstrated in multi-level, poly-structural, cross-sectoral competition between business-systems formed by the market leaders.

Multi-positional oligopolistic competition between the leading companies (their business-systems) for consumers, rivalry between suppliers at different levels for possibility to participate in production-and-supply chain and cooperation with the leading company, cross-competition between participants of different systems generate an effect of a competitive leap.

Within a business system, the competition is no longer unipolar when small and medium businesses compete for orders from large companies. Since outsourcing becomes an integral component of a distributed business-system (supporting the key functions and business-processes, providing unique competences), market leaders also actively compete for partnership with small and medium enterprises as the most dynamic market agents. Such model of structural cooperation is evident on the car manufacturing markets in Japan, mobile electronic devices in Korea, computers in the USA and China.

Under the classical model of oligopolistic competition developed in the period of industrial economy, the major competitive resources are production resources. Globalization levels up the previously dominant competitive advantage of access to cheap and abundant labour and raw materials. In the post-industrial economy the main resource ensuring competitive superiority are intangible assets (brand, knowledge, ideas, talents [2, 25]). To form a strong market position the positive economy of scale is no longer sufficient; a very important element of a competitive advantage combines innovative technologies and methods of cross-market interaction with consumers, counteragents and the State.

The interaction with the society is becoming an increasingly essential competitive resource for large companies. An improved level of life, development of

civic consciousness, emerging new public needs and values (a shift from the «quantity» to the «quality» of life) brought in the concept of socially responsible business.

According to Harvard Business Review [27], the trend for business to become socially responsible is an inevitable priority in business strategies of the market leaders in any country, which is illustrated by new aspects of successful branding. Companies build up their brand value by transferring social obligations into a fundamental component of their corporate mission and reputation (British Petroleum (BP), Tetra Pak, Apple, Samsung, Toyota, the Savings Bank of Russian, etc.). Social and environmental priorities in a business-strategy widened [ИК4] the possibilities for implementing state-of-the-art technologies and achieving the significant competitive advantages not only through financial-and-economic mechanisms but also due to a positive image of a company in the eyes of the society, consumers, company personnel and others.

Therefore, as a result of intensified competition the only «sustainable» advantage of market players is the ability to manage changes better than their competitors, constantly increasing the level of efficiency and innovativeness of technologies and processes, operating in advancement (foreseeing and shaping market needs). Only the companies with strong market positions can be successful achievers. The ef-

iciency and innovations, production of publically important goods become the crucial factor in leadership.

The understanding of oligopolistic (imperfect) competition as redistribution of the wealth and resources is being transformed into an approach to competitive actions as an instrument of generating wealth by increasing value through better production and innovations, based on incentives for enhancing efficiency of resource allocation and production.

In conclusion, summing up the studies in different research areas (strategic management, marketing, market theory, consumer behavior, innovation theory and others) the authors outlined the trend for system-wide changes in the form and the nature of competition on oligopolistic and innovative markets, which require a fundamental revision of approaches to substantiate the principles of antimonopoly regulation at the modern stage. The modified form of competition reflects the transition from classical oligopolistic confrontation of separate economic entities within the same industry to cross-industry competition between multi-level systems of economic agents formed by large companies – the market leaders. Changes in the nature of competition mean that it increasingly takes place not as struggle for market share, but through collaboration and joint efforts on creating the unique value for consumers and companies and shaping new markets.

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ОЛИГОПОЛЬНЫЕ РЫНКИ: ТРАНСФОРМАЦИЯ СОДЕРЖАНИЯ И ФОРМ КОНКУРЕНТНЫХ ПРОЦЕССОВ

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Актуальность исследования. В последние двадцать лет на рынках развитых государств наметилась тенденция концентрации экономических агентов и их укрупнение с целью оптимизации экономических процессов, эффективного функционирования бизнеса, наиболее активной коммуникационной политики. Рынки сырьевых и готовых продуктов, международных и межрегиональных сервисов и работ стали дрейфовать в направлении олигополизации. В этой связи актуальным является анализ и характеристика происходящих существенных изменений в функционировании олигопольных рынков, сформированных под влиянием глобализации, гиперконкурентных процессов, сменяющихся технологических парадигм, инновационных и потребительских тенденций в современной экономике.

Цель исследования: на основе обобщения исследований, представленных разными научными направлениями (стратегический менеджмент, маркетинг, теория рынков, потребительское поведение, инноватика и др.), выделить основополагающие факторы влияния на изменения в функционировании современных рынков, усилении конкуренции в условиях глобализации и перехода к постиндустриальной экономике; определить насколько существенно факторы, стимулирующие формирование олигополий, содействуют интенсивности конкуренции ее участников и противодействуют картелизации олигопольных рынков; выделить основные характеристики, отражающие новое содержательное наполнение модели конкуренции на инновационных олигопольных рынках в сравнении с классической моделью олигополии; определить наличие тенденции к системным изменениям формы и характера конкуренции на олигополистических рынках, которые способствуют существенному пересмотру подходов к обоснованию принципов антимонопольного регулирования на современном этапе; систематизировать и выделить новое содержательное наполнение модели конкуренции на олигополистических рынках, а также факторы, влияющие на интенсификацию конкуренции на олигопольных рынках.

Методы исследования: метод системного анализа, сравнительный и нормативно-правовой анализ.

Результаты исследования. Особенности конкурентного процесса в рамках двух указанных моделей – классической олигополии и олигополии, изменяющейся под воздействием новых тенденций в экономике, – проявляются в условиях многоуровневой, мультиструктурной, межотраслевой конкуренции бизнес-систем, формируемых компаниями-лидерами рынка. Кросс-конкуренция участников разных систем создает условия гибкого рыночного поведения.

Выводы исследования. Системные изменения формы и характера конкуренции на олигополистических рынках, в том числе инновационных, инициируют разработку новых институциональных механизмов и подходов к обоснованию принципов и методов антимонопольного регулирования на современном этапе.

Ключевые слова:

Рынок олигополии, конкурентная политика, характеристика олигопольного рынка, бизнес-система, взаимодействие, трансформация, технологический уклад, конкуренция.

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