



MARKETPLACE AS A KEY ACTOR IN E-COMMERCE VALUE NETWORKS

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ABSTRACT. Background: E-commerce is one of the most dynamic and important sectors of the Polish economy. Its development is driven by rapidly expanding Internet access. Worldwide e-commerce is dominated by marketplaces with a great market share. There are both advantages and disadvantages related to the use of marketplaces, for sellers and buyers alike.

The aims of this paper are to indicate the nature of marketplaces, develop a classification for them, and also to indicate new challenges related to them and development directions in Poland.

Methods: For the needs of this paper, research was conducted using the methods of direct observation and analysis of primary and secondary sources. The primary materials included data obtained from companies providing marketplaces in Poland and abroad, and the secondary ones – reports, studies and Internet sources. In addition, in-depth interviews were performed with experts on marketplaces.

Results: The article provides a detailed description of marketplaces. The authors describe the division and characteristics of marketplaces and discussed the potential trends in this field. It presents marketplace-related benefits and disadvantages, and how the authors classify them.

Conclusions: Marketplaces create new opportunities for expansion on a larger scale for online sellers. Companies do not need to invest in a sales platform or have knowledge of legal aspects. Moreover, they have access to innovative solutions. Obviously, there are many disadvantages, such as very strong competition from numerous sellers in one place, becoming dependent on this sales channel, and neglecting the growth of the seller's own online shop.

Key words: e-commerce, marketplace, value network.

INTRODUCTION

The global value of retail e-commerce in 2018 reached over USD 2.84 T. In 2019 it is expected to exceed USD 3.45 T and climb to USD 4.88 T in 2021 [Statista 2019a]. The share of e-commerce in retail has been growing steadily. Last year, it was 11.9%, reaching 13.7% in 2019 and 17.5% in 2021 [Statista 2019b]. Fashion products (clothes, footwear, accessories), electronics and media (personal electronics, music, games) are the products purchased online most often.

Customers purchase products both from online shops and marketplaces, with the latter

enjoying particular popularity. Last year, the top 100 biggest marketplaces generated turnover of USD 1.86 B. This accounted for over 95% of the revenues across all platforms and around 65% of the world's e-commerce combined. The massive share of these platforms and their dynamic growth (23% in relation to 2017) shows how important they are in shaping e-commerce domestically and internationally. Of the largest 100 platforms, 61 are in the USA, 17 in Asia, 14 in Europe, 5 in South America and 3 in Africa. Interestingly, 59 marketplaces have been founded in USA and 39 are not older than 9 years [Ali 2019].

In terms of turnover, in 2018, the two largest marketplaces were the Chinese Taobao (USD 515 B) and Tmall (USD 432 B), both owned by the Alibaba Group. These were followed by Amazon (USD 344 B), JD.com (USD 259 B) and eBay (USD 96 B) [Ali 2019]. Alibaba's turnover stems both from the purchasing power of China and other Asian states, where the marketplace is active and from the amazing popularity of the group's platforms. 80% of products purchased in China is sold on these portals. Apart from China, marketplaces had over 50% of market share in just two countries. In Germany, where Amazon had a 55% market share, and in Poland, with Allegro registering 50% market share [Ecommerce Foundation 2016]. Currently, Allegro's share in Polish e-commerce stands at around 40%.

Apart from micro and small businesses, medium-size and large firms also sell their products on marketplaces. Recently, more and more of the largest businesses have been joining marketplaces. These new forms of selling have become an important part of both e-commerce and the entire economy. This is because marketplaces eliminate entry barriers to new businesses and the expansion of existing ones. They also create new solutions and show new directions in the digital economy. Amazon, Alibaba and JD.com invest billions in logistics infrastructure, thus helping the regions where they operate to grow.

What is the nature of marketplaces and what marketplaces other than Allegro are available in Poland? What new challenges do marketplaces face and what are their development directions? These are some of the questions we will try to address in the article.

The aims of this paper are to indicate the nature of marketplaces, develop an original classification of them, and to indicate new challenges they face and development directions in Poland.

The paper is divided into three main parts. The first section discusses the nature of marketplaces, the second presents and describes the types of marketplaces, and the third speaks of the future directions for the development of marketplaces.

For the purpose of this article, the authors conducted research by means of direct observation and analysis of secondary sources such as reports, publications, press materials and marketplace websites. Additionally, the article draws on the authors' expert knowledge acquired during over a dozen years of market observations and the previously conducted analyses and reports.

THE NATURE OF MARKETPLACES

Speaking in the most general terms, a marketplace is a platform that offers products and services of numerous sellers, which can be bought by clients [Tian et al. 2018, Li et al. 2019]. Most of the products come from external companies, although some platforms also offer their own products (e.g. Amazon, Allegro). Other businesses must be able to sell their products to make the platform a marketplace, otherwise it is just an online shop. Sometimes the term "marketplace" is wrongly used for online stores with a very wide selection of products. As previously noted, marketplaces can also offer services for sale. However, this article focuses on goods, because their turnover is more complex and requires more attention.

Sellers trade on popular platforms frequently visited by users in exchange for a part of their sales profits. Most often, the marketplace business model is based on collecting fees for sales made through them. These fees differ depending on the platform and the category of products. Some marketplaces collect fees for listing the product (e.g. Allegro). The sellers agree to such fees, because marketplaces allow them to enter the market with low financial outlays. Consequently, such platforms are key selling venues for many sellers.

Marketplaces offer undeniable advantages, such as prompt access to a lot of clients, high recognizability, first contact venue (many buyers start looking for products on marketplaces), ready technical solutions, a payment system and logistics. They are great venues for testing products and new sales markets and for collecting information from clients. A small batch of pilot goods can be

launched to test demand and get feedback from clients, all without making big investments in sales and distribution channels. Some of the limitations are very strong competition (for example, 363,000 new sellers offering identical or very similar products joined Amazon in Europe in 2017), listing systems (some online shop suppliers offer integration and automated listings), communication with clients from abroad, and fees.

Some marketplaces seek ways of generating additional revenues other than from sales commission. One such example may be fulfilment services, consisting in the marketplace taking over processes related to warehouse logistics, i.e. receiving goods, storage, picking, packing, shipping and handling returns [Semeijn et al. 2005]. This is Amazon's speciality, as they operate numerous warehouses across the world. The seller is not obliged to ship their goods to Amazon warehouses, but this may mean that their listings are poorly positioned.

The leading marketplace sellers owe their success to their unique approach to customers

[Church, Oakley 2018]. They draw on clients' emotions and provide them with a product- and delivery-related experience. The emotional aspect applies to lifestyle, fashion, trends and social affiliation. This reinforces the relationship between the client and the platform. Mainly due to customization, the Internet has made it possible to know clients better, in particular their shopping experience, and consequently to adapt the offer to their preferences and to increase their loyalty. Learning the needs of their potential clients allows sellers to offer their products more consciously. Add-on sales are used for existing clients. This may be take the form of cross-selling, where products from other categories (often of complementary nature) are sold, or selling more expensive or more advanced products from the same category (up-selling).

As shown in the analysis, there are both advantages and disadvantages related to the use of marketplaces, and both for sellers and the buyers. These have been specified in Tables 1 and 2.

Table 1. Advantages and disadvantages for sellers

Advantages	Disadvantages
<ul style="list-style-type: none"> • Marketplace brand recognizability • A high number of clients in one place • Low entry barrier (no need to invest in a sales platform or to know legal aspects etc.) • Additional channel of sales and a source of revenue • Ability to reach clients abroad • Sales and logistics support • Better promotion of products (lower expenses on SEO and advertising) • Increased seller credibility • Access to innovative solutions (new tech, marketing and logistics solutions used by marketplaces) • Access to analytical and benchmarking data 	<ul style="list-style-type: none"> • Very strong competition from numerous sellers in one place • Becoming dependent on this sales channel and neglecting the growth of the seller's own online shop • Frequent changes to the sales and fees policy • Service costs (subscription or listing fee, promotion fees and sales commissions) • Restrictive requirements concerning product descriptions and images, customer service • Risk of competitors copying ideas or marketplaces / other sellers offering the popular products • Limited possibilities of promoting the seller's own online shop

Source: authors' own analysis

Table 2. Advantages and disadvantages for buyers

Advantages	Disadvantages
<ul style="list-style-type: none"> • Access to numerous products in one place • Possibility to compare prices of products offered by various suppliers • No need to learn the operation of various online shop platforms (product data base put in order and catalogued) • Higher credibility of sellers • Higher safety of transactions (customer protection programs) • Feedback on sellers from other users • Access to attractive loyalty programs (e.g. Amazon Prime, Allegro Smart) • Availability of used products • Access to products from abroad, with payments possible in local currency 	<ul style="list-style-type: none"> • Becoming dependent on one marketplace • Difficult contact with the seller • No individual approach from the marketplace • Shipments from different sellers divided (fees for additional shipments, delivery in different time)

Source: authors' own analysis

CLASSIFICATION OF MARKETPLACES

As e-commerce develops, new marketplaces emerge. The biggest players offer practically all types of products that can be purchased from bricks & mortar stores. Their platforms often offer items that are only available there, e.g. hand-crafted goods. However, just like there are specialized online shops, marketplaces also become segmented. Consequently, platforms focusing on specific products and business areas have been launched, e.g. fashion, electronics, home or hand-crafted items. An omnichannel strategy is yet another emerging trend, based on the seller's presence in various online and off-line sales channels. Some marketplace owners expand and launch traditional sales channels, and some of the biggest websites open their own marketplaces.

Price comparison sites and best deal sites are not marketplaces by definition. Many buyers start searching for products on websites such as: Ceneo.pl, Nokaut.pl, Alleceny.pl, Okazje.info, and Skapiec.pl. Currently, 67% of Polish web users compare prices of products and services and 19% make their first purchases on the basis of results from price

comparison sites (Gemius 2018). Every third online shop in Poland uses price comparison sites as promotion tools [Skorupska 2017]. Apart from the price, products are tiered based on criteria such as popularity or positive feedback about the store or the product. As e-commerce grows, the role of price comparison sites changes. The entire shopping process can now be conducted on a price comparison site, so such sites are more and more commonly treated as marketplaces.

Another group of emerging marketplaces are platforms available only to business clients (B2B). The reasons driving both individual and business clients are largely the same. Low prices, time savings and convenience are the most important ones. Additionally, businesses want to buy as many goods and services as possible from one place and want to integrate their processes with a selected B2B operator. Research shows that business using online purchasing systems can save up to 15%. Today, only 35% of Polish businesses use such solutions [Aleo, Deloitte 2017].

The types of marketplaces, divided according to various criteria, are presented in Table 3.

Table 3. Classification of marketplaces according to division criteria

Division criterion	Types of marketplaces	
Source of origin	Primary – platforms created in digital version	Secondary – platforms, whose digital versions were created on the basis of traditional operation or online shops complementing their offer
Sales channels	Online only – platforms only available in digital form (pure players)	Online and offline – platforms operating in traditional and digital version (bricks and mortar players)
Type of relation	Direct – platforms through which goods can be purchased directly	Indirect – platforms aggregating information from other sellers and directing clients to them (e.g. price comparison sites)
Reach	Domestic – platforms only available in local languages and handling clients from one country only	International – platforms available in many languages and handling clients from multiple countries
Product presentation	Product catalogue – platforms presenting offers as catalogued products, to which new sellers attach their listings (the platform is the owner of the product description website, where offers from at least 1 seller) are available	Product list – platforms presenting offers as lists of products created by individual sellers (the seller is the owner of their listing)

Division criterion	Types of marketplaces		
Types of clients	B2C – the clients are mainly natural persons, but most of the products can also be purchased by business clients	C2C – the sellers and the clients are mainly natural persons	B2B – the sellers and the clients are mainly businesses
Types of listings	Merchandise – platforms where only goods are offered	Service – platforms where only services are offered	Mixed – platforms where both goods and services are offered,
Types of products	Horizontal – platforms where various sellers offer different products (in numerous categories, fields etc.)	Vertical – platforms where various sellers offer goods in the same category (per branch, application, specialization, etc.)	Mixed – platforms where both sellers and the platform itself offer different products
Intended use	External – open platforms that can be used both by sellers and buyers who satisfy specific criteria	Internal – closed platforms that can only be used by selected buyers or sellers	Mixed – platforms limited for selected sellers who satisfy specific criteria (e.g. shopping clubs)

Source: authors' own analysis

GROWTH OF MARKETPLACES IN POLAND

Marketplaces are increasingly becoming the main selling channels for bricks & mortar sellers and online sellers. Many traders find them convenient, because they attract new clients and provide ways of serving them. Thanks to their brand, marketplaces make products of less-known sellers more credible. Additionally, marketplace owners invest heavily in advertising, promotional activities and PR. The seller's role boils down to providing information about the listing (which is often transferred automatically to the marketplace from the seller's system) and preparing the product for shipment (which may be a part of Amazon's fulfillment service). Marketplaces are also great testing grounds for new products, as large numbers of clients may be reached through them without having to incur substantial costs. In the case of international marketplaces, sellers may reach foreign buyers without speaking their language, having legal knowledge, logistics infrastructure etc.

A lot of evidence points to marketplaces being some of the key actors in the e-commerce value network. Experts anticipate that by 2020 around 40% of online trade will be done through marketplaces [MarkMonitor 2016]. Online sellers have no other alternatives. Apart from thinking of developing their online business, they also have to

consider joining this sales channel or strengthening their current presence in marketplaces. Their 40% share of the Polish market was reached a long time ago. This is mainly due to the history of our e-commerce, as for many years, Allegro was the buyers' first choice. The sales structure only started to change with the presence of competition, such as producers, retail networks, professional online shops and foreign marketplaces.

Every year, several new marketplaces emerge in Poland. This is possible, because the entry barriers do not seem difficult to cross. Unlike with online shops, no warehouses, goods or logistics employees are needed. The cost of developing the IT tools is not an insurmountable obstacle. Upkeep of the site and developing it are the biggest problems. The optimal scale of operation, building brand awareness and ongoing promotional activities seem to be the key to success. Most new marketplaces build their potential in the initial stages of operations by offering free of charge services. However, this can only be done with significant financial back-up. Additionally, the largest marketplaces continue to improve their tools and go to great lengths to attract and keep their clients. Polish e-commerce has seen numerous promising marketplaces that failed to withstand the pressure from competitors, e.g. Świstak.pl or DaWanda.pl.

Given the stiff competition, new marketplaces must do everything to stand out in the market. One of the ways to do this is to specialize in certain fields or products.

Although marketplaces are very “spacious” and can carry all categories of products, buyers look for specialized products in specialist shops. It is true that millions of products can be browsed on eBay, Amazon or Allegro, but these sites will not replace vertical platforms with knowledgeable sellers offering assistance and, often, better prices. This is why some experts claim that following the development of marketplaces offering a wide range of goods, more specialized platforms will emerge and be active in respective fields. The beginnings of this trend can be seen in Poland, as a relatively large number of new marketplaces have recently emerged in the fashion sector (clothes and footwear). Apart from electronics, this is one of the largest segments of the market and one that keeps growing dynamically. Many producers active in this field sell their products themselves. For them, marketplaces are a great way to complement their sales channels, with clients having access to a wide assortment of goods in one place. Research shows that clients care increasingly about a wide range of online sellers and would like to shop in one place. This follows the one-stop shopping concept, where all purchases can be handled in one place. Apart from that, fashion items are high-margin goods. The situation is different with electronics, where the margins are very low and where large retailers known for traditional sales predominate, such as Euro.com.pl, Mediaexpert.pl, Mediamarkt.pl or Komputronik.pl. Consequently, there is practically no space in this field for a middleman, such as a marketplace, specializing in electronics.

The dynamic growth of e-commerce means that it is not only individual clients want to shop online. More and more companies that only deal with business clients are becoming interested in this sales channel. This give rise to marketplaces dedicated to B2B. One of the newest outfits in Poland is OEX24.com, which was launched in February 2019. This is a B2B platform that not only allows the listing of products for domestic and international markets, but also deals with customer service and logistics processes. With its platform, OEX wants to cover the entire e-commerce value chain – from supplier management through sales to handling returns.

More marketplaces should be expected to be launched soon by sellers who are well known in the market, and who have significant potential in the form of networks of suppliers, human resources, IT and clients. They will be able to expand their product portfolio with a new, complementary assortment. This will drive more traffic on their websites and be a source of additional revenues. A good example of this might be IKEA, which is considering starting their own marketplace. IKEA wants to sell its own products and products from other retailers on the marketplace. The offer will not be limited to furniture, but will also include home-related items, in particular DIY and art merchandise. IKEA has been testing sales on Alibaba and Amazon, apparently, with good success. However, creating such a marketplace will be a challenge for IKEA, as other furniture producers and distributors will have to be invited to cooperate. IKEA has declared that no negotiations with their competitors are currently taking place, but apparently, they are interested in creating a sales platform for the entire industry [Fedorenko 2019].

We should also be mindful of competition that marketplaces face from tech companies. Facebook, enjoying great popularity in Poland, runs its own marketplace. The service operates like a noticeboard similar to OLX.pl and Gumtree.pl. It connects sellers and buyers who live close by to start the transaction online and complete it in person during pick-up. It is mostly used by individual clients [Wei et al. 2019]. Marketplaces face more danger from Google Shopping. So far, Google in Poland has been collecting data about products, aggregating them, showing them as Product Listing Ads (ads displayed at the top of the Google search engine page) and redirecting to online sellers. At the beginning of 2019, Google announced they were planning to launch their own marketplace, which, apart from listing offers, will handle payments and provide integration with other solutions. Sellers will be responsible for customer service and logistics. Google is planning to test the new solution first in France. If these tests are concluded successfully, we can expect to see the platform in Poland, too.

Today, the keys to success in e-commerce are technology and logistics [Bask, Lipponen, Tinnilä 2012]. Marketplaces will continue to invest in these two fields in the coming years. Experts expect marketplaces to keep growing in the field of artificial intelligence (AI), machine learning and real-time personalization [Columbus 2018]. With regard to logistics, the focus will be on making shipments quicker and cheaper, offering warehousing services, picking and handling returns. Some related activities can be seen on Allegro in this regard. In March 2019, Francois Nuyts, Allegro's CEO, announced several new solutions. Their objective is to turn the marketplace into a sort of an ecosystem comprised of sellers and providers of complementary services. One of the proposals for change will be a tool with which sellers will be able to analyse their own business against the competition. More attention will be paid to evaluating the sellers in terms of logistics – the time of shipment and delivery, along with return possibilities will be scored. Allegro also wants to implement uniform standards for providers of logistics services with regard to delivery time. Same-day delivery is to be available in selected places. Delayed payment for goods purchased is to be a breakthrough solution. This way, the client will have 30 days from the date of delivery to pay for their order. Credit will not only be extended to clients, but also to sellers, e.g. through a working capital facility and a revolving facility.

The world's biggest shopping platforms, Alibaba and Amazon, are going one step further with regard to logistics. Alibaba has already built numerous warehouses where they perform fulfilment services for their sellers, while continuing to invest in new technologies and expand into new markets. The company is currently at the acquisition stage and is broadening its logistics services. Recently, Alibaba bought 14% of shares in STO Express, the fifth largest Chinese carrier. Previously, the company had also bought shares in YTO Express Group, Best Inc. and ZTO Express [Kapadia 2019].

It has been known for quite some time that Amazon is aiming at the position of the leader in logistics services. The evidence for this is the company's own warehouse, fleet of trucks,

own airline, drone delivery system and numerous patents related to logistics and last-mile management, which is the most complex and costly element of the entire logistics process in e-commerce. In the USA, Amazon has its own parcel lockers and courier vehicles, which reduces the number of parcels handled by courier operators. Recently, the company also launched courier services in Europe, namely in France, Germany, GB and Austria. This expansion caused DHL to withdraw their operations from Austria and made the Austrian postal service apprehensive as to their own future in this market [CEP-Research, 2019]. Amazon may repeat these steps when they launch sales in Poland. Consequently, the courier, express and parcel sector should be ready for this scenario.

When analysing the growth of marketplaces in Poland, we should also remember about the very dynamic development and growing popularity of other, foreign platforms in Poland. GearBest.com, Wish.com and Banggood.com are some of these.

SUMMARY

This study extends current understanding of the essence of marketplaces in e-commerce. It develops an original approach to marketplace classification to facilitate a better understanding of their wide range. Moreover, it indicates their advantages and disadvantages.

Thanks to marketplaces, trade in Poland has become easier and more convenient than ever before. Its beneficiaries are both companies and customers. Almost each firm has the potential to become a successful trader. Marketplaces create new opportunities for already existing entities to expand on a larger scale and offers prospects for rapid development to emerging entities. This is possible due to low entry barriers that encourage more and more companies to sell their products on the Internet. They can offer a wider range of products without great effort. Companies are able to save on both fixed and variable costs, such as rent, labour and other overheads associated with the presence on their own websites. It is particularly important in the case of cross-border trade, because companies

do not have to spend a lot of money on international expansion. Moreover, they have access to innovative solutions (new tech, marketing and logistics solutions used by marketplaces). Obviously, there are many dark sides of marketplaces in e-commerce, such as very strong competition from numerous sellers in one place, becoming dependent on this sales channel and neglecting the growth of the seller's own online shop.

Even though our research offers new insights into marketplaces understanding, it has some limitations, e.g. its theoretical character. However, our study can provide a basis for the preparation of empirical studies which will allow new hypotheses to be tested.

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MARKETPACE JAKO KLUCZOWY UCZESTNIK SIECI WARTOŚCI W HANDLU ELEKTRONICZNYM

STRESZCZENIE. Wstęp: Handel elektroniczny w Polsce jest jednym z najbardziej dynamicznych i ważnych sektorów gospodarki. Jego rozwój pobudzany jest przez szybko rozwijający się dostęp do Internetu. W światowym e-commerce dominują marketplace'y o dużym udziale w rynku. Korzystanie z nich wiąże się jednak zarówno z licznymi zaletami i wadami zarówno dla sprzedających, jak i kupujących.

Celem artykułu jest charakterystyka marketplace'ów oraz opracowanie ich oryginalnej klasyfikacji, wskazanie nowych wyzwań i kierunków rozwoju w Polsce.

Metody: Na potrzeby artykułu przeprowadzono badania z wykorzystaniem metod bezpośredniej obserwacji i analizy źródeł pierwotnych i wtórnych. Materiałami podstawowymi były dane uzyskane od firm prowadzących marketplace'y w Polsce i za granicą, a materiałami wtórnymi - raporty, badania i źródła internetowe. Ponadto przeprowadzono wywiady pogłębione z ekspertami ds. marketplace'ów.

Wyniki: W artykule scharakteryzowano szczegóły dotyczące marketplace'ów. Autorzy opisali ich podział i charakterystykę oraz omówili potencjalne trendy na rynku marketplace'ów. Przedstawiono korzyści i straty z nimi związane oraz sposób ich klasyfikacji.

Wnioski: Marketplace'y stwarzają nowe możliwości ekspansji na większą skalę dla sprzedawców internetowych. Firmy nie muszą inwestować w platformę sprzedaży ani znać aspektów prawnych. Ponadto mają dostęp do innowacyjnych rozwiązań. Oczywiście, istnieje wiele wad, takich jak bardzo silna konkurencja ze strony wielu sprzedawców w jednym miejscu, uzależnienie od tego kanału sprzedaży i zaniedbanie rozwoju własnego sklepu internetowego sprzedawcy.

Słowa kluczowe: e-handel, marketplace, wartość dla klienta

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