

Scenarios of Development Strategies Based on Economic and Organisational Instruments – Part 1

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Abstract: *Purpose* – The main aim of this study is to create scenarios of development strategies based on economic and organisational instruments for enterprises which have various strategic situations, from the model of “difficult strategic situation” for the enterprises which struggle to survive on the market, through models of “stable strategic situation” and models of “seeking chances for development” to models of “dynamic development.

Design/methodology/approach – Method of analysis was used to determine model strategic situations as well as to identify economic and organisational instruments. The Delphi method was used in the case of empirical research whereas scenario analysis was exploited to create strategies.

Findings – In the article, four types of market strategic situations were established, 30 economic and financial as well as 20 organisational instruments taking into account their exogenic and endogenic aspect was identified. The instruments determine opportunities for the development of a modern business entity. The ranking of the identified economic and financial as well as organisational instruments was made during the empirical research based on the Delphi method. The instruments classified at the top of the ranking created a system of tools which stimulate development activities and were used to create scenarios of development strategies for given strategic situations.

Originality/value – The factual and scientific value of the content of the whole development concerns: a concrete transmission of the theory to practice; an original approach to the identification of the instruments determining the operation of the enterprises on the basis of the strategic spheres of the operation of the enterprises; an innovative creation of the system of instruments providing a basis to create the effective strategies in the various strategic situations which is not common in the literature; a model depiction of the strategic situations to which each of the enterprises currently existing on the Polish market may be subordinated.

Keywords: models; instruments; scenarios; strategy

Introduction

This article belongs to a series of two pieces of empirical research whose main aim is to create scenarios of development strategies based on economic and organisational instruments for enterprises with various strategic situations. In order to pursue the main aim, additional purposes were indicated: determination of model strategic situations which reflect the standing of enterprises operating on the market, identification of economic and

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organisational instruments which determine the development opportunities available to enterprises, empirical research into the influence of identified instruments on the development of enterprises in particular model strategic situations, creation of projection scenarios for enterprises on a modern market on the basis of the classification of instruments in established strategic models.

The method of analysis was used to determine model strategic situations as well as to identify economic and organisational instruments. Empirical research, based on the Delphi method derived from the group of inventive methods, was used to create the ranking of economic and organisational instruments for each model. A scenario analysis, derived from the collection of the forecasting methods, i.e. qualitative methods, was used to create a projection scenario based on economic and organisational instruments.

In accordance with the pragmatics of the research two theses were proposed. The former assumes that, in the current economic environment, the enterprises cannot develop themselves effectively without an appropriately generated strategy realised on a modern, competitive market. The latter assumes that the scenarios of development strategies for enterprises should include in their structure a creative role of the economic and organisational instruments.

Two research questions were formed in order to extend the hypotheses and make them complete: Which economic and organisational instruments influence the creation of projection scenarios in a competitive market decidedly? And with the use of which scenarios it is possible to create effective development strategies for enterprises operating on a national market?

While making an analysis of the current knowledge one may find, in the literature on subject, various classifications of the strategic situations and scenarios created for them. The first concepts of a division of the companies concerning their strategic behaviour was introduced by Miles and Snow (1978) who described them as: Defender, Prospector, Analyser and Reactor. A similar concept and division was created by Kotler (1994). Drucker (1992: 224–270) promotes in his vision the following strategies and entrepreneurial scenarios: Be the first and the strongest, Find their weak points, Ecological niche, and change of the value and features. The most valued concept among traditional ones was made by Porter (2010b: 52–62). It was based on: a Low-Cost Leadership Strategy, Differentiation Strategy and Focus Strategy. When one of the strategies is not used, it causes “getting stuck”. The concept of Porter is the one which is most often modified and the new concepts are created on its basis as well on the basis of other traditional models, the examples being a concept of Treacy and Wiersem’s (1995), Value Disciplines, which has many followers, or Value Innovation by Kim and Mauborgne (2005). The economic and organisational instruments are described by Zimniewicz (2014: 189) who identifies and describes the instruments of management. The vast majority of articles include Key Success Factors (KSF) (Flores et al. 2000: 33). Olszewska (2008: 123) mentions six universal criteria which create the KSF for enterprise, i.e. participation on the market, cost competitiveness, image, technical compe-

tences, financial potential and the skills of managers. Zelek (2008: 267) presents the KSF with reference to Pareto's Principle (the 80–20 Rule). Gierszewska and Romanowska (2014: 128) also invoke the 80–20 Rule while analysing the KSF. In the literature, terms of instruments, KSF or factors and mechanisms of competitiveness are similar. Nevertheless, the most important is (it is mentioned by all authors) that as a result of mutual interactions they influence the creation of a system of the dynamic relations which directly determines the operation and the development of the enterprise in a modern economy.

1. Creation of the strategic situations of the model

On the basis of conducted analysis of strategic situations exploited on the modern market four models of market-driven strategic situations were established, which may match each of the enterprises existing in Poland. Apart from the author's own materials, the following publications were used to create the descriptions of strategic situations (Bąkowski et al. 1993: 41–57; Gajda 2015: 156–159).

Model of a “difficult strategic situation”

The model of “difficult strategic situation” presents the least beneficial situation of business entities. This situation is in part the consequence of the worldwide economic crisis which began in 2007/2008. Enterprises which qualify for this model operate in the conditions of an organisational and financial crisis. Such a company does not have a recognized market and chooses only reproduced investments. The continuation of this model of action is connected with lower effectiveness and a worsening financial situation. Signals from the market reach the company with a great delay, effectiveness of leading activity decreases permanently; there is a loss of position on the market. The most valuable part of the strategic potential of the enterprise, i.e. human resources, is focused on the battle with a crisis; the lack of developing and motivational perspectives is pervasive. This causes a serious danger not only to the continuation of business activity but mainly to the existence of a business entity. So the difficult situation of an enterprise is intensified by the lack of an effective strategic programme and discrepancy between visions (concepts) of operation and realised strategic policy and changes happening in its environment.

Model of a “stable strategic situation”

The model of a “stable strategic situation” is characterised by the established position of the enterprise among its contractors which at the same time gives it a profitable financial standing. The internal state of the company causes that it functions in safe conditions which do not imply any threats directly. The company has quite a well generated strategy of operations in current market conditions which assure it stable development in a particular seg-

ment of the market. A stable organisational and financial situation causes that the system of management of the company is dominated by a linear style of thinking with a limited number of stimuli for creative strategic solutions and time-lags of the establishment of a new aggressive vision of operations in the future. However, a change of the environment because of economic reality, e.g. prolonged crisis, intensification of competition, fall of demand, lowering revenues from sales etc. may cause an occurrence of states of danger for business entities described in this model.

Model of “seeking chances for development”

The next strategic situation may be interpreted as “seeking chances for development”. It refers to the enterprises which have a difficult as well as a stable strategic situation but they have potential and they are aware of the necessity to reorientate their position on the market e.g. by the changes in the structure of the business entity or seeking new strategic solutions. Entities which are included into this model, seeing market chances, work on a generation of new effective visions as well as functioning now and in the future. Managerial staff recognise its market position and the necessity of reorientation or modification of a previous activity of the company as well as changes of accepted strategic assumptions. It is clear to the management that from a pragmatic point of view it is very difficult to reform a strategic policy of the company but even though it is complex, it is possible. The reforming of current strategic policy of the enterprises in this model gives the opportunity to change the occupied position on the market and perspective of the fast development of the enterprise.

Model of “dynamic development”

An enterprise identical with “dynamic development” is the main strategic target of numerous business entities in each segment of the market in Poland as well as on the global market. Such a company has a well-created strategy of operations which confirms its practical effectiveness in competitive conditions. Constantly growing return on sales or the assortment of services having at the same time relatively low costs causes that there are no interruptions in the maintenance of the liquidity of a company. The position is so strong that each occurrence of an external threat is neutralised with its own force or with the aid of cooperation partners. Management knows the advantages of the prosperity of an enterprise as well as being aware that if the market conditions are not effectively used, a turbulent environment will lead it to mediocrity i.e. a stable model. Therefore, an enterprise constantly works on the generation of the most effective strategic solutions.

2. Identification of the economic and organisational instruments determining the development opportunities of modern enterprises

Strategic spheres of the operation of enterprises

An analysis of the basic functions which are realised in a typical economic organisation were used for the identification of economic and organisational instruments determining the development opportunities of enterprises operating on a modern market. Decomposition of the entire collection of operations (functions) made by the enterprise is possible because of the specification of the value chain. This tool launched by M.E. Porter (1990a: 175) allows us to present in a sequence from all elementary collections of functions occurring within the enterprise (from business concept, through shopping, manufacturing of goods, service, distribution and sales, to the achieved profit).

As a result of mutual interactions and connections, functions being parts of the value chain allow us to determine strategic spheres of operation, i.e. elements of dynamic structure, in which there are processes deciding directly about the development of an enterprise and its position in a competitive market. Identified strategic spheres for business entities operating in a modern market include: sphere of finance, sphere of staff, sphere of marketing, sphere of manufacturing and sphere of management. The selection of the strategic spheres allows us to eliminate the possible effects of distracting actions on the spheres existing in the enterprises which have minor significance for their development and to focus on the identification of the most important instruments for each strategic sphere which determines the development and success of the company.

Identification of economic instruments

Economic instruments constitute tools in the sphere of finance. Because of the range of their usage and their characteristics (the real movement of financial resources is a direct result of their operation) they were divided into exogenic, economic and financial instruments which have an effect on economic organisations and which are at the disposal of a given state as well as endogenic instruments which determine the functioning of business entities which depends to a great extent on their managers.

Exogenic, economic and financial instruments are unambiguously included in the factors of the economic reaction of the state to economic organisations. The tools of direct investments from the budget or subsidy are considered as regulators of supply in conditions of a market economy. The support of enterprises with financial tenders from the budget is a direct result of their influence. Instruments burdening the activity of business entities i.e. tax instruments both in the form of tax burdens such as: VAT and excise, CIT, property tax, VED and quasi taxes as payments from profit, State Fund for the Rehabilitation of Handicapped People (Polish Abbreviation PFRON), social security contribution for employees as well as various charges are of a different nature. Identified exogenic instruments such as:

customs, tariffs, exchange rate, interest rates, determine demand and supply and shape the market conditions as well as enable the rational allocation of manufacturing factors.

The endogenic, economic and financial instruments are typical tools of a market economy generated within an enterprise or tools whose usage depends on managers of such entities. The price of manufactured goods is a basic endogenic tool. This factor allows us to: make a profit (a fundamental, synthetic factor of the effectiveness of management), compete in a particular segment of a market, and create a pricing strategy. The allocation of profit giving managers the possibility to have at their disposal this part of profit which remains in the enterprise after deducting the part of compulsory taxes and charges given to the state as well as investments and depreciation connected with new or the enlargement of existing objects belonging to assets constitute identified derivatives of the above-mentioned tool. Endogenic instruments include also, financing of the business activity i.e. achievement of capital or its disposals, starting from long-term loans and supplier credit, receiver credit, overdraft, mortgage loans, bill discount facility to the obtainment of capital in the form of crediting through shares and bonds connected with the capital market and venture capital – capital with higher risk. Leasing and factoring are also endogenic instruments of the sphere of finance.

Identification of organisational instruments

Organisational instruments which determine the operation of common business entities on a modern market should be perceived as a group of tools of management whose main aim is to shape the forms of functioning. Decisions indicating areas of operation in identified strategic spheres: staff, marketing, manufacturing and management are a direct result of their influence.

In order to identify organisational instruments, the same division like in the case of economic and financial factors was used (into exogenic and endogenic ones). Taking into account a retrospective assumption, exogenic instruments constitute a group of non-economic tools being in the hands of entities which create economic policy. As non-parametric instruments they may have a legal, administrative or informational form. Legal form refers to the normative acts relating to organisational, functional and private structure of entities. Administrative form includes instructions and resolutions of the authorities of an imperative nature; concessions, limits, licences, permissions; location decisions etc. Informational form is connected with reports of the development of a region and a given state; information relating to structural changes planned in the economy; information concerning a supply and demand situation etc.

Identified endogenic organisational instruments are factors determined by the market. However, they are disposed of by the managers of economic organisations.

In the sphere of staff, obtainment, deployment, support of development and motivating employees to realise targets of the enterprise with the usage of the following instruments:

selection of staff, motivation, evaluation of employees, education and remuneration is a priority task of the identified instruments.

The sphere of marketing includes the following identified instruments: market research, company research, distribution and promotion. Actions in this sphere are connected with an analysis of the current situation, market research and company research as well as with the improvement of existing and the creation of new distribution channels of goods and promotion in a broad sense.

Instruments in the sphere of manufacturing, namely: organisation of production, diversification and quality determine directly: suprastructure and machinery stock, level of their exploitation, organisation of the process of production, diversification activities as well as the improvement of the quality of the offered goods.

The sphere of management with its main processual target, i.e. generation of decisions in the four most important functions of management, namely: planning, organisation, motivating and control, directly determines the functioning of the remaining strategic spheres and at the same time whole economic organisation. Identified tools of this sphere consist of: system of information, organisational structure, planning, control and effectiveness of management.

3. Empirical research of the influence of identified instruments on the development of enterprises in specified model strategic situations

Methodological assumptions and the course of empirical research

The Delphi method, derived from the group of inventive methods, was used in this article to classify and to evaluate the economic and financial as well as organisational instruments which stimulate development strategies whereas a score-based assessment was exploited in the implementation of the research problem considered.

The empirical research was based on a group of ten Polish best performing enterprises from the transport sector (PKS) which provide passenger and cargo services in Central Europe as well as the European Union. These enterprises qualify as medium-sized enterprises. 80 experts took part in the research, including presidents, chief accountant, and directors/managers of the finance department, operating department, marketing department, logistics department and the HR department.

The selection of such a representative body enabled to fulfil the most important criterion of the use of the Delphi method, i.e. the proper selection of the specialists (experts) who constitute co-authors of the research. The above-mentioned method assumes that the specialists should be selected from experts on the issues which are substantially related to the subject matter of the research in order to represent all fields of knowledge and experiences which consider a problem being resolved. Having met these requirements, representatives of the management board and the sphere of finance of the given enterprises (managers,

chief accountants, financial directors, finance specialists) were selected to the team of assessment and classification of the economic and financial instruments. The organisational instruments were evaluated and classified by the team representing the remaining strategic spheres, i.e. staff, marketing, production of goods and management (i.e. managers of the enterprises, directors/managers of the HR department, marketing department, passenger and cargo departments and logistics department). One should also add that a part of the experts taking part in the research managed to lead their enterprises from very difficult strategic situations (similar to the model of “the difficult strategic situation”), through the indirect strategic situations, up to the current condition following the model of “the dynamic development.”

The following course of the research was taken. Four generated model strategic situations were presented to the experts. Each model had a list of the identified economic and financial as well as organisational instruments. Experts relying on their experience and knowledge awarded each instrument within the particular model with a weighting from 1 to 30 for the economic and financial instruments and from 1 to 20 for the organisational instruments, respectively. The results of particular experts were transposed into an arithmetic mean for each model. The received mean determined the place of the instrument on the ranking of importance and became the basis of the classification of each instrument in particular strategic models. In the final stage of the research, the experts, having taken into consideration the strategic situation in the particular models as well as the results of the ranking, determined the number of 14 instruments which create the system for each model. The results of the empirical research are presented below in Table 1 (the ranking of economic and financial instruments) whereas the organisational instruments are shown in Table 2.

Table 1

The classification of economic and financial instruments

Ranking	The model of “a difficult strategic situation”	The model of “a stable strategic situation”	The model of “seeking chances for development”	The model of “dynamic development”
1	2	3	4	5
1.	Long term loans	Profit allocation	Overdraft	Prices
2.	Depreciation	Prices	Prices	Investments
3.	Subsidies	Investments	Leasing	Shares
4.	Leasing	Tariffs	Subsidies	Bonds
5.	Prices	Overdraft	Venture Capital	Venture Capital
6.	Supplier credit	Factoring	Long term loans	Profit allocation
7.	Receiver credit	Long term loans	Investments	Leasing
8.	Tariffs	Leasing	Receiver credit	Long term loans
9.	Overdraft	Supplier credit	Mortgage loan	Factoring
10.	Direct investments from the government budget	Depreciation	Charges	Interest rate
11.	Profit allocation	Subsidies	Shares	Exchange rate

1	2	3	4	5
12.	Social security contribution for employees	VAT and excise	Factoring	Overdraft
13.	Property tax	CIT	Depreciation	Depreciation
14.	VED	Mortgage loan	Bonds	Supplier credit
15.	Mortgage loan	Receiver credit	VAT and excise	Tariffs
16.	Interest rate	Property tax	Supplier credit	Mortgage loan
17.	Charges	Direct investments from the government budget	Profit allocation	Receiver credit
18.	CIT	VED	Direct investments from the government budget	Direct investments from the government budget
19.	Bill discount facility	Social security contribution for employees	Social security contribution for employees	Bill discount facility
20.	Factoring	Bill discount facility	Bill discount facility	Subsidies
21.	VAT and excise	Interest rate	CIT	VAT and excise
22.	Exchange rate	Charges	Interest rate	CIT
23.	State Fund for the Rehabilitation. Of Handicapped People	Exchange rate	Exchange rate	Property tax
24.	Labour Fund contribution	Labour Fund contribution	Tariffs	VED
25.	Investments	State Fund for the Rehabilitation of Handicapped People	Property tax	Charges
26.	Customs	Customs	VED	Customs
27.	Venture Capital	Venture Capital	Labour Fund contribution	Payments from profit
28.	Payments from profit	Shares	State Fund for the Rehabilitation of Handicapped People	State Fund for the Rehabilitation of Handicapped People
29.	Bonds	Bonds	Customs	Labour Fund contribution
30.	Shares	Payments from profit	Payments from profit	Social security contribution for employees

Source: author’s study made on the basis of the conducted empirical research.

Table 2

The classification of the organisational instruments

Ranking	The model of “a difficult strategic situation”	The model of “a stable strategic situation”	The model of “seeking chances for development”	The model of “dynamic development”
1	2	3	4	5
1.	Market research	Distribution	Market research	Quality of offered goods
2.	Organisation of production	Effectiveness of management	Selection of staff	Effectiveness of management

1	2	3	4	5
3.	Effectiveness of management	Planning	Effectiveness of management	Control
4.	Diversification of operation	Quality of offered goods	Promotion	Selection of staff
5.	Selection of staff	Promotion	Quality of offered goods	System of information
6.	Company research	Market research	Diversification of operation	Market research
7.	Organisational structure	Organisation of production	Organisation of production	Motivation
8.	Planning	Selection of staff	Company research	Education
9.	Motivation	Control	Planning	Diversification of operation
10.	Control	Motivation	Organisational structure	Planning
11.	Quality of offered goods	System of information	Distribution	Promotion
12.	Evaluation of employees	Diversification of operation	System of information	Organisation of production
13.	Distribution	Company research	Control	Company research
14.	Promotion	Education	Motivation	Evaluation of employees
15.	System of information	Remuneration	Evaluation of employees	Organisational structure
16.	Legal	Organisational structure	Remuneration	Remuneration
17.	Administrative	Administrative	Education	Distribution
18.	Remuneration	Informational	Informational	Legal
19.	Education	Evaluation of employees	Administrative	Administrative
20.	Informational	Legal	Legal	Informational

Source: author's study made on the basis of the conducted empirical research.

Ergo, the generated systems of instruments in each model were the basis for creating four scenarios of development strategies giving the possibility to place a newer, better strategic position of the enterprise as well as a strong basis to compete in a modern market.

Conclusions

The on-going transformation of the economic system in Poland as well as the occurring crises implicate the necessity of reorientation of the way enterprises operate which has existed so far to generate effective development actions.

Almost each enterprise existing on the Polish market may be assigned to four model strategic situations which are presented in this part of the study. The identified models assign and specify only initial conditions for entities which operate on their basis. The prior target of the enterprises is to create a projection scenario which allows the enterprise to place a new, better position on the market and as a result ensures dynamic development. It is possible through two processes which are coupled with each other. The former one, which is creative, relies on the selection of an accurate vision of change of the strategic situation

and placing a new, better position on the market. The latter relies on marking, on the basis of a diagnosis of a particular model, a model of concrete targets and formulation of functional projection scenarios which are possible to reach.

In both cases, the system of economic and financial as well as organisational instruments constitutes a basis for the creation of scenarios of development strategies. It is impossible to create a new, better market situation without adequate usage of the instruments. It is confirmed by the projection scenarios, built and presented in the second part of the study and based on the selected instruments which create the system of tools which stimulates development for each adopted strategic model.

In conclusion, it is crucial to specify firstly your strategic situation, market position and then use a modern array of realisation tools to create effective development strategies having at the same time the creative attitude of managerial staff (lateral) to strategic problems in order to be successful in a dynamic and competitive market. The following conclusions may be drawn:

1. Managerial staff of the enterprises must know and be aware of the current strategic situation of the company while making any development actions.
2. Managers must recognise instruments which determine the operation of the business entity and know how to use them.
3. A chosen and created development strategy must be based on the system of the economic and financial as well as organisational instruments which are appropriate for the strategic situation of the enterprise.

Finally, it should be mentioned that business entities which operate on a competitive market are subordinated not only to the economic system but also to the rule of entropy according to which all the systems show a natural tendency for falling. On the other hand, each system tries to improve its position towards others. It should be learnt and used accurately by the people who manage business entities.

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SCENARIUSZE STRATEGII ROZWOJOWYCH BAZUJĄCE NA INSTRUMENTACH EKONOMICZNO-FINANSOWYCH I ORGANIZACYJNYCH – CZĘŚĆ I

Streszczenie: *Cel* – Celem głównym opracowania jest wykreowanie scenariuszy strategii rozwojowych bazujących na instrumentach ekonomiczno-finansowych i organizacyjnych dla przedsiębiorstw znajdujących się w różnych sytuacjach strategicznych (od modelu trudnego walczącego na rynku o przetrwanie poprzez modele ze stabilną sytuacją strategiczną i poszukiwania szans rynkowych, aż po model dynamicznego rozwoju).

Metodologia badania – Do określenia modelowych sytuacji strategicznych i identyfikacji instrumentów wykorzystano metodę analizy. W badaniach empirycznych metodę ekspercką, a do budowy strategii metodę scenariuszy.

Wynik – W prezentowanym artykule opracowano cztery rodzaje rynkowych sytuacji strategicznych, zidentyfikowano 30 instrumentów ekonomiczno-finansowych i 20 organizacyjnych w aspekcie egzo- i endogenicznym, decydujących o możliwościach rozwoju współczesnych podmiotów gospodarczych. Podczas badań empirycznych bazujących na metodzie eksperckiej dokonano rankingu zidentyfikowanych instrumentów ekonomiczno-finansowych i organizacyjnych. Instrumenty najwyżej sklasyfikowane w rankingu stworzyły system narzędzi stymulujących działania rozwojowe i posłużyły do opracowania scenariuszy strategii rozwojowych dla opisanych sytuacji strategicznych.

Oryginalność/wartość – Wartość merytoryczna i naukowa niniejszego opracowania dotyczy: konkretnego przełożenia teorii na praktykę gospodarczą; oryginalnego podejścia do identyfikacji instrumentów determinujących funkcjonowanie przedsiębiorstw na podstawie strategicznych sfer funkcjonowania przedsiębiorstw; nowatorskiego niespotykanego w literaturze stworzenia systemu instrumentów dających podstawę wykreowania efektywnych strategii działania w różnych sytuacjach strategicznych; modelowego ujęcia sytuacji strategicznych, w które można wkomponować każde obecnie funkcjonujące na polskim rynku przedsiębiorstwo.

Słowa kluczowe: modele; instrumenty; scenariusze; strategia.

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