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DYNAMIC MARKETING CAPABILITIES FOR COAL INDIA – CASE OF A PROMINENT SUBSIDIARY WESTERN COALFIELDS LIMITED

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ABSTRACT :

Through decades of research few strategies have been identified to help organizations remain competitive in turbulent business environment. Marketing capabilities termed as Dynamic Marketing Capabilities (DMCs) are the most prominent strategies and have shown through empirical studies to help organizations. The extensive relevant information has been collected through various secondary sources and through interaction with various executives in the organization, CIL & WCL. This article builds on the integrated framework of DMCs, analyses prevailing conditions in the Coal industry, with specific reference to a subsidiary of Coal India, and suggests few measures which could help Coal India remain sustainably competitive.

KEYWORDS : Coal, CRM, Dynamic Capabilities, Dynamic Marketing Capabilities, Energy, New Product Development, Strategy.

INTRODUCTION:

Coal provides 30% of the world's primary energy, 40% of global electricity, and 68% of steel. The main advantages of Coal are its availability, heat-rate conversion at comparatively lower cost for power generation, and low construction costs per megawatt (New regulatory trends : effects on coal fired power plants demand, 2015). Also most of the thermal Coal produced is domestically used for power generation (Press Trust of India, 2016).

As per (BP Energy Outlook 2035, 2015) China's Coal demand growth decelerates rapidly from 902 Mtoe (6.1% p.a.) in 2005-15 to just 13 Mtoe (0.1% p.a.) in 2025-35. After 2030, demand from China will likely decline (-0.1% p.a.), driven by the re-balancing of the economy toward services and domestic consumption, and is likely to be supported by efficiency improvements along with more stringent environmental policies.

India's demand growth, in contrast, will remain strong; rising from 142 Million tonnes of energy equivalent (Mtoe) (5.9% p.a.) in 2005-15 to 159 Mtoe (3.0% p.a.) in 2025-35 as the country remains on the path of industrialization. In the final decade India replaces China as the leading source of Coal demand growth.

Despite all the positive projections the recession in the global economy has started taking its toll on India also. Coal India had record production of 536.50 MT in 2015-16 (Coal India achieves 536 million tonnes output in fiscal 2016, misses target, 2016) though due to supposedly sluggish demand the Coal stock increased to more than 55 MT (Roychowdhury, Govt may revise Coal India output target downward, 2016). It has been reported by (Dhoot, 2015) (Buckley, 2016) that since the beginning of financial year 2016-17 there has been continuous decline in demand by the important category of consumers i.e. power consumers despite consistent increase in consumption of minerals like Coal (Mtoe¹ terms) (BP P.L.C., 2017). Also as far as the environmental or community

impact of Coal is concerned the implied costs related to pollution, land degradation, displacement of communities (Chandrasekhar, 2017) etc have given Coal a bad name and competition from renewable energy sources e.g. Solar etc. has put substantial pressure on the future of Coal. Even the continued focus of India's Prime Minister (Wernick, 2017) as well as Energy ministry on renewable energy (Ward, 2017) is making future tough for Coal.

Dynamic Capabilities (DCs) concept was introduced in the strategic management by (Tesse & Pissano, 1994). After various practical studies in the area scholars also tried to observe the relationship between marketing and DCs due to which subsequently 'Dynamic Marketing Capabilities' (DMCs) term was coined by (Bruni & Verona, 2009). There have been other applied studies by (Protogerou, Caloghirou, & Lioukas, 2012); (Pérez-Cabañero, Cruz-Ros, & González-Cruz, 2015); (Lin & Huang, 2012)) to see the relationships between firms' performances and DMCs/ DCs and strong evidences have been found in services as well as manufacturing industries. In view of the proven DC strategies there is a strong need to develop dynamic capabilities for the marketing activities for Coal India, if it has to remain relevant in due course of time, even though traditionally mining has been a sellers' market as the situation is changing dramatically.

2. COAL INDIA (CIL) & WESTERN COAL FIELDS LIMITED (WCL)

Coal India is now world's largest Coal producers (Ghoshal, 2017) and it has seven subsidiaries which are involved in mining in specific states even though few overlaps exist and another subsidiary which is involved in mainly planning and exploration, CMPDI (About Us | Coal India).

Western Coalfields is one of the seven subsidiaries of Coal India operating mainly in Maharashtra and has small presence in Madhya Pradesh. There are 76 operational Coal mines of WCL (Western Coalfields Limited (WCL), 2017).

2.1 Existing customer acquisition process

At present the customers approach the various coal companies, including at other subsidiaries, via the following process (New Coal distribution policy, 2007) (Figure 1):

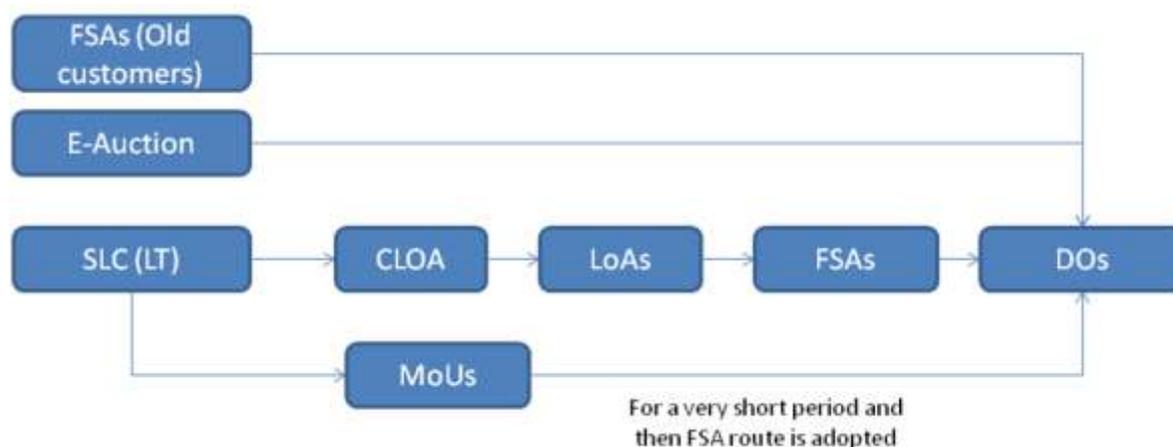
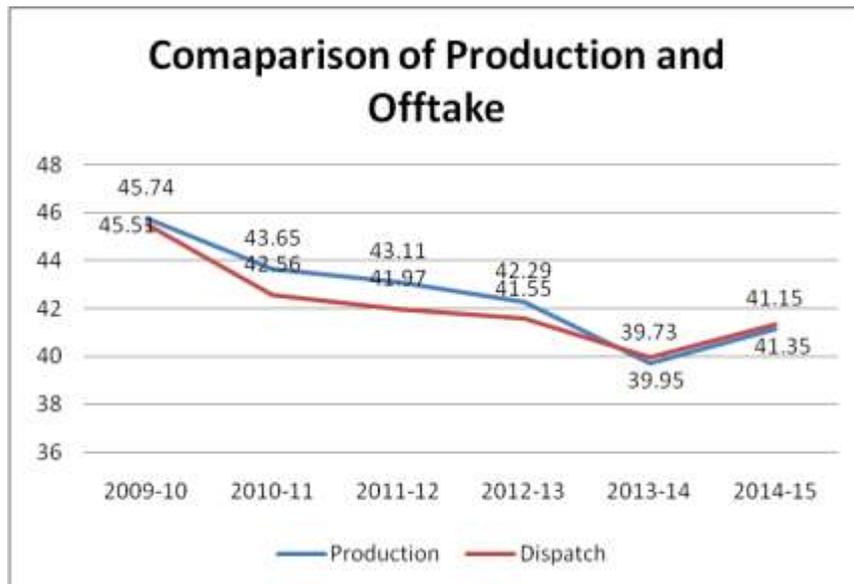


Figure 1: Customer acquisition process at WCL

2.1 Sales performance

As it can be seen below (Figure 2) that both the production and off take has been continuously decreasing over the last 6 years. Also it can be observed that the off take has been generally lower than the production except during the year 2013-14 & 2014-15 (albeit lower than expected increase in offtake).



Source: WCL Annual Report & Accounts 2015-16, 2016

Figure 2: Production and Offtake over the years (MT)

As per (WCL Annual Report & Accounts 2015-16, 2016) the offtake for the year 2015-16 has been substantially lower than the expected offtake resulting in almost 1 MT of Coal stock.

3. PRESENT SITUATION AT WCL/ COAL INDIA

The Coal demand, from the Indian coal companies, has decreased substantially due to various factors:

1. International market - There is dramatic slowdown in the international Coal demand resulting in oversupply. The largest consumer of Coal China has dramatically reduced its Coal consumption as it has been resulting in severe environmental consequences and has started shifting to renewable energy sources. Countries like Australia, Indonesia, South Africa have started targeting Coal to countries like India where the demand is still strong due to unavailability to other cost effective options for power generation (Henderson, Song, & Joffe, 2017) (Reuters, 2015).
2. Poor quality of Coal & inadequate evacuation system – It has been reported by (Office of the Chief Economist, Department of Industry and Science, Australian Government, 2015) that the quality of Indian coal is poor and the transportation system to evacuate the Coal from mines to customers is also not adequate. The poor quality has also been substantiated by Indian media e.g. (Basak, 2013).
3. Slowdown in economic activity and power generation - There has been substantial decrease in the economic activity in India, due to global recession, which has resulted in less electricity consumption by industries and subsequently less power production (Ram, 2016).
4. Financial health of power producers and distributors - Power producers are having substantial financial dues to be recovered from power distribution companies (Pandey, 2015) which has impacted their financial health. Many power producers have scaled down their production and operating at low power factors (equitymaster.com, 2016) (Prasad, 2016)
5. 'Merit order effect'² due to operational inefficiencies of power producers - As per the prevailing practices and more focus on renewable energy the marginal cost of power production (operation cost per unit of MWh) is higher by thermal power plants and is lowest for renewable energy sources. It has resulted in temporary shutdown of power plants in Madhya Pradesh which is a power surplus state. Similar problems have also been observed in Maharashtra (Tembhekar, 2012).
6. Rigid pricing structure & decision making - The pricing of Coal is done centrally by Coal India for all types of Coal

grades and subsequently it is communicated to different subsidiaries (Pricing | Coal India, 2017). Even though it is well accepted that weathering results in degradation of quality of Coal (Cox & Nelson, 1984) the options offered to customers are very rigid and they are asked same prices for newly mined Coal as well as Coal from very old stocks. It results in skewed demand as well as resistance from customers when they are forced to lift Coal from old stocks. There are also various 'cost plus mines'³ where the production cost is higher compared to other mines and the organization is finding it hard to sell coal from these mines e.g. Durgapur Open Cast & Bhatadi Open Cast mines resulting in very high coal stock.

7. High amount of receivables from customers with respect to net profit - Due to various inefficient processes e.g. grievance mechanism, customer interaction mechanism, financial litigations high amount of receivables are due from customers for the Coal companies (Coal India Ltd. (COALINDIA) - Director Report, 2016). It has resulted in unrealistic profit estimation and impacted the financial health of the organization.

8. Loss of Coal stock – There is significant amount of Coal stock loss due to self combustion during summer season & washing away during rainy season which adds to the woes of the Coal companies (Roychowdhury, Coal India puts itself in slowdown mode, here's why, 2016).

9. Poor customer grievance handling process – There have been numerous reports of customers grievances ((Press Trust of India, 2013); (Power utilities complain of poor quality coal, 2008)) and in appropriate responses by Coal India subsidiaries (Sengupta, 2013).

10. Lack of product diversification – The only product sold is in the form of solid coal and no value addition is done. Despite numerous talks of clean coal technologies ((Coal secretary Sushil Kumar bats for clean mining in production strategy, 2016); (Aggarwal, 2017)) no time bound interventions have been taken by WCL/ Coal India.

4. DYNAMIC MARKETING CAPABILITIES FRAMEWORK

Few decades ago Resource Based View (RBV) of a firm held important mention in the strategic management process of a firm⁴ as in some scholars' views ((Barney J. B., 1986); (Barney J., 1991)) resources held central importance in a firm having competitive advantage. Despite several benefits it was usually criticized as being a more static theory and was analyzed to be inadequate in explaining sustainable competitive advantage of firms in today's dynamic and turbulent environment ((Priem & Butler, 2001); (Teece, Pisano, & Shuen, 1997)). Dynamic Capabilities (DCs) concept was introduced in the strategic management by (Tesse & Pissano, 1994). The initial definition of Dynamic capabilities as given by (Teece, Pisano, & Shuen, 1997)

is 'the firm's ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments' i.e. these are the abilities which help a firm in being sustainably competitive. There has been substantial conceptual work in this field and also some empirical work in the area of marketing, operations management etc in relation to DCs. Various scholars tried to observe the relationship between marketing and DCs due to which subsequently 'Dynamic Marketing Capabilities' (DMCs) term was coined by (Bruni & Verona, 2009). This term was used to identify and assess different marketing activities or processes which lead to development of dynamic marketing strategy.

The nature and roles of DCs is the following (Table 1) as pointed out by (Barrales-Molina, Martínez-López, & Gázquez-Abad, 2014):

Table 1: Nature and roles of DCs

Feature	Description
Nature	<ol style="list-style-type: none"> 1. Organizational and deliberate processes and routines 2. Repetitive processes (non-spontaneous) 3. Higher-order routines 4. Idiosyncratic (i.e. specific to an institution) and embedded capabilities 5. Path-dependent phenomena
Role	<ol style="list-style-type: none"> 1. Change resources and capabilities 2. Change operating routines

4.1 Integrated Dynamic Marketing Capabilities framework

In their research paper (Barrales-Molina, Martínez-López, & Gázquez-Abad, 2014) also developed an integrated framework for identifying and promoting empirical work on Dynamic Marketing Capabilities. The framework has four categories of parameters:

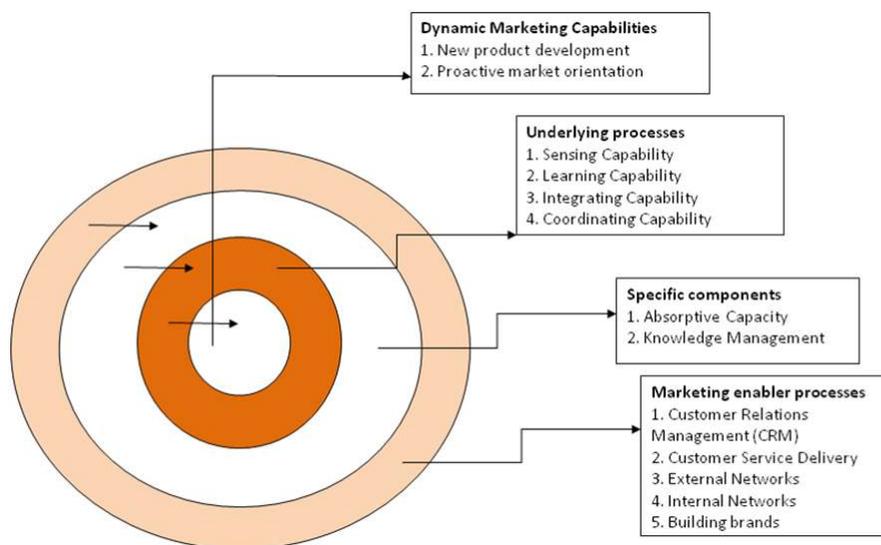
1. Marketing enabler processes
2. Specific components through which 'enablers' help in building processes
3. Underlying processes (help in finally developing DMCs) and finally
4. Dynamic Marketing Capabilities

Here is a tabular representation of various features identified for the above mentioned four categories (Table 2):

Table 2: Various features of DCs

Factors	Features
Marketing enabler processes	<ol style="list-style-type: none"> 1. Customer Relations Management (CRM) 2. Customer Service Delivery 3. External Networks 4. Internal Networks 5. Building brands
Specific Components	<ol style="list-style-type: none"> 1. Absorptive Capacity 2. Knowledge Management
Underlying processes	<ol style="list-style-type: none"> 1. Sensing Capability 2. Learning Capability 3. Integrating Capability 4. Coordinating Capability
Dynamic Marketing Capabilities	<ol style="list-style-type: none"> 1. New product development 2. Proactive market orientation

The flow of activities is from the outer circle to the inner circle (Figure 3):



5. Dynamic marketing strategy for WCL/ Coal India

As identified in the beginning, in order to have sustainable competitiveness the organization need to initiate activities in the four mentioned categories which will enable it to move from the 'outer part of the circle to the inner part of the circle'. The organization could take following measures under various categories⁵ :

5.1 Marketing enabler processes

	Existing practices	Proposed practices
Customer Relations Management (CRM)	- Old fashioned - No integrating mechanism of sales, marketing and customer care service	Implement Operational CRM & Analytical CRM processes which involved integration of sales, marketing and customer care service
Customer Service Delivery	Simple transactional approach - receiving payment & transporting goods	More integrated approach with linking to Operational CRM
External Networks	No linkage, only treated as customers or suppliers	Integrated approach is needed where the integration is done with Analytical CRM processes leading to 'specific components'
Internal Networks	Little attention to information from employees or contractual staff	More integration with a valuable source of information which can result in generation or creation of various 'underlying processes' through 'specific components' resulting in creation of DMCs
Building brands	Once in a while event	- Sustained engagement with customers - Create positive image of the brand by associating with social service, youth, vulnerable communities - Create professional image by completing commitments under a time frame & build transparency in activities

Typical implementation method of Customer Relationship Management process:

A typical method in the context of standard organizations is mentioned below:

Activity	Current Situation	With CRM
Order Collection	- On paper support - Subsequent entry into the computer system - Possibility of errors	- Single data entry - Directly from the customer into the computer system - Salespeople with customer information
Order confirmation	By telephone or fax or letter	The customer directly by the Internet
Document generation	Pre-established forms	- Separation of content and presentation - Full internalization - Customized design
Pursuing unpaid bills	Outside the computer system	- Integrated into the Computer System - Information available to all employees
Marketing campaign management	Outside the computer system	- Full computerization - Making use of data from previous campaigns - Making use of customer data
Customer analysis	Basically, financial information is used	- Richer, more complete information - Customization
Programming sales trips	- Outside the computer system - Equal treatment of customers	- Prior study of customers - Personalized offer
Managing commission/performance incentive	Sales bonus	New criteria: number of complaints, loyalty, etc
Attending to customer queries	There is no specialized department	- Plenty of information available when attending customers - Personalized attention

Source: Methodology for customer relationship management by (Chalmeta, 2006)

5.2 Specific Components

	Existing Practices	Proposed Practices
Absorptive Capacity	No such practice	<ul style="list-style-type: none"> - Build CRM - Increase Social media, alliance and network competence - Build efficient and responsive supply chain
Knowledge Management	Weak central training center & 'isolated' skill centers, periodic 'info sharing' sessions	<ul style="list-style-type: none"> - Integrate CRM knowledge to Supply chain management - Develop learning management system with 'on demand' and 'always available' content

5.3 Underlying Processes

These are the micro foundations for DMCs.

	Existing Practices	Proposed Practices
Sensing Capability	Non existent	<ul style="list-style-type: none"> - Dependent on <i>Absorptive capacity</i> - Develop Analytic CRM processes - Customers feedback or continuous engagement methods - Industry reports - Strategy department/ various marketing enabler processes
Learning Capability	Non existent	<ul style="list-style-type: none"> - Dependent on <i>Absorptive capacity</i> - Continuous engagement with the various stages of CRM - Continuous feedback to the knowledge management or training team with the developed sensing capabilities
Integrating Capability	Through individual feedbacks	<ul style="list-style-type: none"> - Dependent on <i>Knowledge management</i> component - Design systems through which the sales team is fed continuous information through strategy team, industry reports, redesign of existing processes
Coordinating Capability	Non existent	<ul style="list-style-type: none"> - Dependent on <i>Knowledge management</i> component & <i>integration</i> with existing processes - Assess resources, deploy knowledge in field through specific teams/ marketing team and feed the experiences back in the <i>Knowledge management</i> component

5.4 Dynamic Marketing Capabilities

The below mentioned capabilities are the most accepted dynamic marketing capabilities which help organizations stay competitive in a sustainable manner. In the context of Western Coalfields Limited or Coal India in general there are few suggestions regarding both the capabilities as mentioned below:

	Existing Practices	Proposed Practices
New Product Development	<ul style="list-style-type: none"> - Single classification of product & 'broad' price only mechanism for 'new' product development - Centralized department at Coal India for ideating on new product development with little strategic focus from organization 	<ul style="list-style-type: none"> - Feedback from the various processes and enablers will assist in this - Target new product forms with Coal e.g. underground coal gasification, Coal Bed Methane projects etc - Utilize existing strengths to develop new energy products viz. Solar energy, wind energy etc - Develop dynamic/stepped pricing with 'aging' of the product against 'static' pricing methodology
Proactive Market Orientation (MO)	<ul style="list-style-type: none"> - Nonexistent and only weak responsive MO present 	<ul style="list-style-type: none"> - Dependent on various underlying processes viz. sensing, learning, integrating & coordinating - Development of activities needed in order to have proactive MO - Know about <i>latent</i> customer needs by analyzing different ways of using energy e.g. household uses etc - Explore different serviceable markets and existing <i>substitution effects</i> in primary energy

6. CONCLUSION

As it has been shown above that the Coal industry as well as the environment in which WCL is working is changing rapidly. With existing practices or legacy of practices it is facing various issues leading to financial loss as well as market loss to not only other Coal companies but to various energy companies. In order to remain competitive it will be appropriate to utilize the above mentioned framework and develop activities which lead to DMCs and also develop the underlying processes for these DMCs. It is the only way to address transformation of the environment and remain in the 'energy market'. Further studies can be done to tune the processes for the purpose of making the strategies more effecting for WCL and CIL in general.

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- 1.Mtoe – Million Tonne Oil Equivalent
 - 2.All power producers are ranked as per marginal cost of per MWh production and the ones with lowest cost are asked to provide power first & in turn generate it.
 - 3.Dedicated mine to a specific customer and was opened under specific agreement with customer
 - 4.Firm means any profit making organizations and can exist in the form of various kind of legal entities e.g. a company, partnership firm etc
 - 5.The identified improvements are based on extensive interaction with the existing executives of the organization, personal experiences of the researcher who is employed in the organization as well as their proved impact on the performance of organizations.
 - 6.Over time due to weathering the GCV (gross calorific value) of Coal decreases. This is the factor which is considered while pricing different types of Coal. At present no existing pricing mechanism in practicing taking into account weathering effect.



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