

Magdalena Szydelko

Rzeszow University of Technology

e-mail: mszydel@prz.edu.pl

ORCID: 0000-0002-9661-3519

FACILITATING FACTORS FOR THE ESTABLISHMENT OF BENCHMARKING PARTNERSHIP IN SELECTED CLUSTERS

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Abstract: The purpose of the paper is to identify the degree of impact of key internal and external facilitating factors on the establishment of benchmarking partnership in clusters and also to assess the significance of the differences in the results of a survey conducted in this field in a group of selected cluster enterprises and experts. The purpose of the work determined the research procedure which included indirect research focused on the analysis of literature sources and direct research conducted among selected clusters and experts in the form of a survey. The comparative analysis of the impact indicators of individual facilitating factors leads to the conclusion that for the majority of internal and external factors, the strength of the positive impact on the benchmarking partnership was quite similar in the opinion of both representatives of enterprises and experts.

Keywords: benchmarking, cluster, benchmarking partnership, facilitating factors.

1. Introduction

When overlapping three research areas in management and quality assurance sciences: cross-organisational partnership relations, clusters and benchmarking, an interesting research subject can be distinguished regarding the benchmarking partnership of cluster enterprises. The choice of this subject of empirical analysis, focused on the identification of impact of the internal and external factors facilitating the establishment of the particular form of partnership, was determined by two important considerations.

Firstly, the literature review led to the conclusion that the authors of Polish and foreign studies refer to enterprise partnership, clusters and benchmarking categories as separate aspects of economic reality. Benchmarking partnership in clusters has not been the subject of any previous in-depth empirical analyses, which means that the knowledge in this field is at an early stage of development. It should be noted that the concept of benchmarking partnership in a cluster (in other words, intra-cluster benchmarking based on partnership) was first used and explained by this author (Szydełko, 2015), who provided further elaborations on this issue in her PhD thesis and monograph (Szydełko, 2019). The outcomes of the research, as well as the related conclusions presented here, may greatly contribute to filling the gap in the knowledge of factors facilitating the establishment of benchmarking partnership by cluster enterprises.

Secondly, the research subject was also chosen due to the expected practical usefulness of the outcomes of direct analyses, as well as the related conclusions. The traditional war with competitors is a thing of the past, and enterprises more and more often create new forms of relationships with other entities, often of a partnership nature. One can agree with Tyszkiewicz (2018, p. 54) that, “the basis of modern organizational forms between enterprises is a long-term partnership”. The group of interest in the area of research on benchmarking partnership should mainly include managerial staff and other employees of cluster enterprises directly involved in cluster initiatives (collective projects and undertakings), or benchmarking specialists. This refers both to enterprises that have already implemented benchmarking partnerships, both formally and informally, as well as those just intending to participate knowingly in an intra-cluster benchmarking partnership.

The purpose of the paper is to identify the degree of impact of key internal and external facilitating factors on the establishment of a benchmarking partnership in clusters and also to assess the significance of the differences in the results of a survey conducted in this field with two groups of participants (among selected cluster enterprises and experts).

The paper claims that effective benchmarking partnership in a cluster requires the identification of conditions that facilitate the development of this form of cross-organisational learning.

In considering the analysed problem, the following question was formulated: are there any significant differences in the opinion of cluster enterprises’ representatives and experts on the degree of impact of internal and external facilitating factors on the establishment of the benchmarking partnership?

2. Research methods

The methodology concept of the study reflects the research problem, goals and formulated thesis. According to the guidelines included in the research methodology literature (Niemczyk, 2013, pp. 22-23), the pluralistic approach was used by applying the rule of triangulation of research methods and data sources.

For the purposes of the research procedure, the most general classification of research methods was assumed – qualitative and quantitative. The theoretical considerations were based on the research procedure involving indirect analysis (qualitative methods), oriented on the literature analysis. The empirical stage involved the following quantitative methods:

1) direct (primary) research conducted among cluster enterprises and experts in form of a survey using a questionnaire,

2) statistical methods, namely statistical data analysis conducted with STATISTICA™ software, including descriptive statistics analysis and an assessment of the significance of average factor value differences.

The following logical reasoning methods were used in the research procedure: deduction in the theoretical and induction in the empirical dimension. The thought cognition processes included analysis and synthesis.

The time range of direct research (data collection stage) was the period from 2 November to 30 December 2016.

The survey questionnaire was sent to 434 enterprises participating in ten selected clusters with registered offices in the Podkarpackie voivodeship in Poland. The clusters were selected for the purposes of the direct research based on the following six criteria:

1. The cluster has at least one valid document confirming its existence.
2. The cluster has a defined and clear economic profile.
3. The cluster is characterised by the varied structure of its entities (at least ten cluster members were required).
4. Cluster members actively and regularly contact each other.
5. The cluster has an active coordinator who provides services for the benefit of the members.
6. The coordinator agrees to help in the dissemination of the research tool among the cluster members.

Finally, 41 enterprises returned completed survey questionnaires, which gave a response rate of 9.45%. Due to the selected methodological approach, it is not possible to generalize the results of the empirical research.

In order to obtain a more comprehensive source material and to optimise the results of the survey among cluster enterprises concerning the factors facilitating the establishment of a benchmarking partnership, a survey was conducted among experts. The group was selected for the purposes of the direct research based on the following criteria: the expert has a thorough knowledge in benchmarking, clusters or inter-organisational relations (he/she has many scientific publications in these areas), or has practical experience in the field of cluster enterprises cooperation or implementation of benchmarking projects. The group of experts selected for the survey included 30 specialists who could provide a competent opinion regarding the subject of the research; 16 persons submitted filled-in questionnaires (3 cluster

coordinators, 2 benchmarking specialists and 11 researchers). Thus, the response rate was 53.3%. The group of experts included academic teachers or cluster coordinators.

3. Explication of the concept of the benchmarking partnership of cluster enterprises

Benchmarking is not a method for copying the practices of competitors, but rather a way of seeking superior process performance by looking both inside and outside the industry. The term ‘benchmark’ refers to the reference point against which performance is measured. It is the indicator of what can be achieved *vis-à-vis* what is being achieved (Mohapatra, 2012). Benchmarking is a powerful tool for improvement in various fields of business activity. It refers to gathering information by companies on what the others are doing, usually to evaluate whether they are operating efficiently or to identify areas for improvement (Sharma, Iqbal, & Victoriano, 2013).

In the general approach, benchmarking is a process of the creative improvement of an organisation through learning from peers and using their best practice experiences in a given field. In a detailed approach, benchmarking is a process implemented both on the operational and the strategic level of an organisation, consisting in the systematic measuring of processes and comparing own experience (results) and solutions in various fields (constituting the subjects of benchmarking), with best practices within and outside the organisation. The last stage of the benchmarking process is the creative adjustment of best practices that allows to reach the set of measurable and non-measurable goals, not followed by anti-competitive effects.

The concept of benchmarking is “so vast and flexible that this process might be adjusted to conditions of the functioning of different types of social and economic structures” (Szydelko, 2018a, p. 27). According to Morosini (2004, p. 307), a cluster is a “socioeconomic entity characterised by a social community of people and a population of economic agents localised in close proximity in a specific geographic region”. Cluster participants “work together in economically linked activities, sharing and nurturing a common stock of product, technical and organisational knowledge in order to generate superior products and services in the marketplace” (Morosini, 2004, p. 307). It must be pointed out that clusters are made up not only of physical flows of inputs and outputs, but also involve the intense exchange of business information, know-how, and technological expertise, both in traded and untraded forms (Sölvell, 2008). Thus, cluster participants may establish long-term partnership cooperation in the fulfilment of common projects and cluster initiatives, resulting in an improvement of market performance and competitiveness of the involved partners.

In the literature, the concept of benchmarking partnerships was briefly defined by Bendell and Boulter (2000, p. 122), who explained that benchmarking partnership is “a mutual beneficial exchange of best business practice information which should lead to improved performance for all the organisations involved”. However, none of the researchers conducted theoretical analyses in terms of the possibility of benchmarking adjustment to the needs of cluster members.

For the purposes of this paper, the following theoretical interpretation of the concept of benchmarking partnership of enterprises within a cluster was accepted: it is a process of mutual beneficial exchange of information between the enterprises participating in a cluster, concerning their performance and best practices in various fields of activity, according to partnership rules. This leads to improvement of performance of the parties involved in the benchmarking process (micro level), and an improvement of the cluster competitive advantage (meso level) (Szydelko, 2018b).

The implementation of the benchmarking partnership is justified by cluster enterprises due to the properties of the cluster and the occurrence of key factors determining the success of the benchmarking partnership, as well as the character of the benchmarking process (Szydelko, 2018b, 2019).

4. The degree of positive impact of internal and external factors on the establishment of the benchmarking partnership within a cluster – research results and discussion

The identification of the facilitating factors on the establishment of the benchmarking partnership should be performed taking into account the fact that the literature sources indicate several features that allow to explain the uniqueness of inter-organizational relations in a general sense. Epistemological pluralism has led to the formulation of many attributes of inter-organizational relations by many researchers. The essential features attributed to relations include (Baccarani, 2005; Cropper, Ebers, Huxham, & Ring, 2008; Czakon, 2007; Håkansson & Snehota, 1995; Kay, 2009; Rupik, 2009; Sudolska, 2011; Ulaga & Eggert, 2006):

- 1) reciprocity, which usually means mutual involvement and exchange,
- 2) outlays on the fulfilment of common goals,
- 3) distribution of power, namely the capability of one party of the relation to influence the behaviour of the other party,
- 4) involvement, consisting in the active contribution to the process of deepening and improving the existing relations,
- 5) long-term relationship,
- 6) information, material or energy exchange,
- 7) adaptation, consisting in adjustment to the expectations of the other party, and to the changing conditions of the business environment.

Considering the significance of the facilitating factors and their positive impact on the implementation of intra-cluster benchmarking, internal (corporate) factors and external factors within the cluster and the benchmarking group are essential. As far as the external factors are concerned, originating in the macro-environment, the impact on that form of cooperation of enterprises within the cluster is much weaker and less evident, which is why these factors were not included in further analysis. The inspiration to create the list of facilitating factors were the conditions for building relationships on the business-to-business market proposed in the literature (Cygler, 2009; Håkansson & Snehota, 1995; Kay, 2009; Klimas, 2014; Knoblen & Oerlemans, 2006; Rossignoli & Ricciardi, 2015; Rupik 2009; Sudolska, 2011; Ulaga & Eggert, 2006). However, the specificity of benchmarking and clusters was taken into account.

As part of the conducted survey, the participants (representatives of cluster enterprises and experts) were asked to evaluate the strength of the positive effect of selected variables (29 favourable factors) on establishing a benchmarking partnership within a cluster. In the survey questionnaire, the respondents used the 5-grade Likert scale, where 1 indicated very low positive impact, 2 – small positive impact, 3 – medium positive impact, 4 – high positive impact and 5 – very high positive impact.

With regard to the formulated research problem, an attempt was made to confront the outcomes of the survey conducted among 41 cluster enterprises and 16 experts. The Mann-Whitney test was performed in order to assess the differences in the replies of the two groups of participants concerning:

- 1) average values of strength of the positive impact of individual internal and external factors,
- 2) average values of impact of all items in both categories of factors – internal and external.

For the purposes of an in-depth analysis focused on the comparison of the degree of impact of the group of nine internal and twenty external factors on the establishment of a benchmarking partnership within a cluster, basic descriptive statistics were determined.

Table 1 presents a summary of the arithmetic means calculated in two groups of respondents for individual internal (from FI-1 to FI-9) and external (from FE-10 to FE-29) facilitating factors and the results of the Mann-Whitney test (p -value). The arithmetic mean of the score refers to the impact indicators of individual factors (IF). The summary is a ranking of 29 facilitating factors arranged in the order of decreasing arithmetic mean of score given by individual cluster enterprises. The factors were arranged from the highest to the lowest score in terms of their positive impact on the benchmarking partnership. The group of internal facilitating factors is shown in Table 1.

Encouragingly, enterprises participating in the research were aware of the existence and impact on the benchmarking partnership of not only internal, but also external factors.

Table 1. Assessment of the significance of the differences between average positive impact strength values of individual internal and external factors in two groups of respondents

Internal and external facilitating factors for the establishment of a benchmarking partnership by the cluster enterprises	Arithmetic mean (IF)		p-value
	Enterprises (N=41)	Experts (N=16)	
FI-1. Positive attitude of the management towards the idea of learning from peers within the cluster	4.54	4.38	0.5556
FE-10. High level of mutual trust in a cluster	4.46	4.37	0.7584
FI-2. Wide knowledge of the leadership on benchmarking partnership	4.22	3.75	0.2858
FI-3. Positive attitude of team members towards the idea of learning from peers within the cluster	4.17	4.19	0.6038
FE-11. Social proximity of enterprises within the cluster	4.17	4.19	0.4332
FE-12. Implementation of joint projects and undertakings within the cluster	4.17	4.06	1.0000
FI-4. Relational competence of the enterprise	4.15	4.19	0.5207
FI-5. Wide knowledge of team members on benchmarking partnership	3.93	3.88	0.8951
FE-13. Focus of potential partners on reciprocity	3.90	3.81	0.7988
FE-14. Effective communication system supporting the exchange of information	3.88	3.88	0.9091
FI-6. Experience in knowledge, information and internal communication management	3.85	3.69	0.9510
FE-15. Cognitive proximity of cluster members	3.85	3.25	0.0630
FI-7. Previous experience in the effective implementation of benchmarking	3.66	4.13	0.0469*
FE-16. Mutual understanding of benchmarking motives	3.63	3.56	0.8261
FE-17. Convergence of benchmarking goals set by the enterprises	3.54	3.75	0.2700
FE-18. Perceiving benchmarking partnership as low-risk cooperation	3.49	3.00	0.1345
FI-8. Risk management capability in building cluster relations	3.39	3.25	0.6412
FI-9. Capability to cover the expenses related with benchmarking within the cluster	3.39	3.31	0.8813
FE-19. Equal rights and benefits for benchmarking partners	3.39	3.62	0.5093
FE-20. Organisational closeness of enterprises within the cluster	3.37	3.62	0.2332
FE-21. Symmetry of involvement of enterprises in the fulfilment of benchmarking goals	3.37	3.63	0.3831
FE-22. Adaptation capability of cluster benchmarking companies	3.29	3.31	0.9790
FE-23. Symmetry of involvement of resources for benchmarking purposes	3.20	3.25	0.6538
FE-24. Possibility of using the IT tool in benchmarking	3.17	3.31	0.6538
FE-25. Medium or high level of cluster maturity	3.10	3.13	0.9370
FE-26. Geographic proximity of enterprises within the cluster	2.88	3.19	0.3735
FE-27. Balance between short-term and long-term benchmarking goals	2.78	2.50	0.2939
FE-28. Critical mass of the cluster	2.71	2.94	0.5556
FE-29. Institutional closeness of enterprises within the cluster	2.56	3.31	0.0088**

Key: FI – internal facilitating factor, FE – external facilitating factor, IF – impact indicators of individual factors.

Source: author's own work based on the research results.

The comparative analysis of the impact indicators of individual factors led to the conclusion that for the majority of internal and external factors, the strength of the positive impact on the benchmarking partnership was quite similar in the opinion of representatives of enterprises and experts. An exception in the group of internal factors was the significantly higher importance ($p = 0.0469^*$) of previous experience in the effective implementation of benchmarking (FI-7) – average expert's rating was 4.13 and average cluster enterprises' rating was 3.66. In the group of external factors, the only statistically significant exception ($p = 0.0088^{**}$) was the higher importance (highly significant difference) of institutional closeness of enterprises within the cluster (FE-29) in the view of the expert's survey participants. The difference in the evaluation of the cognitive proximity of cluster members (FE-15) was also close to statistical significance ($p = 0.0630$) – in this case, the higher positive impact was attributed by the surveyed enterprises.

The lack of significant differences in the evaluation of the impact of individual facilitating factors on the establishment of a benchmarking partnership (except FI-7 and FE-29) was reflected in the overall assessment of the impact of factors in both groups – internal and external. Total impact values in both factor categories were analysed by comparing descriptive statistics, including arithmetic mean, median, standard deviation, highest value (maximum) and lowest value (minimum). The listed characteristics of internal and external facilitating factors, calculated for both groups of respondents, as well as the results of the Mann-Whitney test (p -value) are presented in Table 2.

Table 2. Assessment of the significance of the differences between the average positive impact values of internal and external factors determined in the two groups of respondents

Category	Basic descriptive statistics for facilitating factors									
	Internal factors					External factors				
	\bar{x}	Me	s	min	max	\bar{x}	Me	s	min	max
Enterprises	3.92	3.89	0.45	2.67	4.78	3.45	3.40	0.43	2.60	4.35
Experts	3.86	4.00	0.52	2.67	4.78	3.48	3.42	0.53	2.40	4.40
p-value	0.8261					0.6795				

Key: \bar{x} – arithmetic mean, Me – median, s – standard deviation, min – lowest value, max – highest value.

Source: author's own work based on the research results.

The obtained test probability value ($p = 0.8261$) indicated that there were no statistically significant differences in the overall assessment of internal facilitating factors in the groups of surveyed cluster enterprises and experts. The analysis of the test probability value ($p = 0.6795$) for external facilitating factors led to the same conclusion – differences in assessment in both groups of respondents were not statistically significant.

Facilitating factors on the establishment of a benchmarking partnership have not been the subject of research so far, therefore the list of them is an original contribution. The research results cannot be directly compared with others. It should be noted that researchers who have identified and studied the factors influencing the building relationships on the business to business market, point to the special role of enterprise management in building inter-organizational relations (positive attitude and wide knowledge of the management and staff) and mutual trust (Cygler, 2009; Håkansson & Snehota, 1995; Kay, 2009; Sudolska, 2011). The research results presented in this article also point to these key factors.

5. Conclusion

As a result of the research, the answer to the research question was obtained and the goals were – in the author's opinion – achieved.

This paper was an attempt to confront the responses provided in two groups of participants in the research leading to the identification of the degree of impact of facilitating factors on the establishment of a benchmarking partnership in a cluster environment. In general, the assessment of the significance of the differences in the survey results led to the conclusion that for the majority of the analysed factors, both internal and external, the average values of the positive impact on the benchmarking partnership reported by the respondents in two unconnected groups were similar. Statistically significant differences in their opinions appeared only for two factors. The experts participating in the survey attributed a higher importance to previous experience in the effective implementation of benchmarking and the organisational closeness of enterprises within the cluster. The lack of statistically significant differences in the assessment of the impact of most facilitating factors on the establishment of the benchmarking partnership was reflected in the results of the assessment of the significance of the differences between the overall values of the impact of internal and external factors. This means that the differences in the assessments of both groups of respondents were not statistically significant.

Additionally, the high repeatability in the comparison of key facilitating factors ($IF \geq 4.0$) was apparent for both unconnected groups of respondents. This implies a relatively high convergence in the perception of the major factors by the representatives of cluster enterprises and experts in the aspect of their positive impact on the establishment of a benchmarking partnership in a cluster.

The outcomes of the experts survey allowed for both objectivizing and extending the knowledge obtained in the empirical research conducted among the selected cluster enterprises.

Yet it should be noted that the results of the empirical research, as well as the related conclusions, may be a valuable source of data and information for the representatives of enterprises participating in the studied clusters. The knowledge on the degree of the impact of the facilitating factors will allow cluster enterprises acting

as benchmark partners (whether actual or potential) to knowingly develop conditions to foster the establishment of the described form of partnership, strengthen the positive factors and overcome or limit any barriers that might occur. The results of the research may inspire cluster coordinators (managers) to undertake cluster initiatives aimed at formalizing the benchmarking partnership of enterprises in which they could act as moderators, which can also be a stimulus for them to search further in the area of building and developing this form of partnership, beneficial for all cluster members.

The considerations presented here confirm the claim that the effective implementation of benchmarking in a cluster requires the identification of factors that facilitate this form of cross-organisational learning.

The author is quite certain that some limitations could not be eliminated in the conducted study. These were mostly associated with the assumed methodological approach. The data collection process was based on gathering respondents' opinions, subjective by nature, which could also affect the quality and content of the formulated conclusions. In the survey questionnaire, 5-grade scoring scales were used, which is not without significance in terms of objectivity of the results. The interpretation of the scoring (despite the attachment of relevant descriptions) could vary within the group of respondents. Another critical limitation related to the methodology was that the outcomes of the empirical study could not be generalised. This was due to the fact that only selected Polish clusters located in the Podkarpackie voivodeship were chosen to participate in the study on cluster enterprises' benchmarking partnership.

The outcomes of the analysis, as well as the related conclusions, can be the starting point for further, in-depth empirical study.

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CZYNNIKI SPRZYJAJĄCE NAWIĄZYWANIU PARTNERSTWA BENCHMARKINGOWEGO W WYBRANYCH KLASTRACH

Streszczenie: Celami artykułu są rozpoznanie stopnia oddziaływania kluczowych wewnętrznych i zewnętrznych czynników sprzyjających nawiązywaniu partnerstwa benchmarkingowego w klastrach oraz ocena istotności różnic między wynikami badań przeprowadzonych w tym obszarze wśród wybranych przedsiębiorstw klastrowych i ekspertów. Postawione cele zdeterminowały wybór procedury badawczej obejmującej badania pośrednie nakierowane na analizę literatury oraz badania bezpośrednie z wykorzystaniem techniki ankietowania przeprowadzone w celowo dobranych klastrach i wśród wybranych ekspertów. Analiza porównawcza wskaźników oddziaływania poszczególnych czynników sprzyjających prowadzi do wniosku, że dla zdecydowanej większości czynników o charakterze wewnętrznym i zewnętrznym ocena ich pozytywnego wpływu na partnerstwo benchmarkingowe dokonana przez przedstawicieli przedsiębiorstw i ekspertów jest bardzo podobna.

Słowa kluczowe: benchmarking, klastr, partnerstwo benchmarkingowe, czynniki sprzyjające.