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## **STRATEGIC E-COMMERCE MANAGEMENT AND OPERATIONAL EXCELLENCE: JUMIA AND KONGA'S BUSINESS MODEL EVOLUTION AND SUPPLY CHAIN INNOVATION IN NIGERIA**

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### **ABSTRACT**

This study analyses the strategic development of Nigeria's two foremost e-commerce platforms, Jumia and Konga, emphasising their business model adaptations and supply chain advancements from 2018 to 2024. This research identifies essential strategic adaptations that have facilitated these platforms in navigating Africa's challenging e-commerce landscape through a thorough analysis of financial reports, industry data, and operational developments. The study shows that both companies have made big changes to how they do business. Jumia has focused on cutting costs and bringing the market together, while Konga has focused on integrating all of its channels and improving its technology. The results show that for e-commerce to work well in Nigeria, businesses need to use a mix of digital innovation, physical infrastructure, strong payment systems, and flexible logistics networks. The research enhances comprehension of e-commerce development in emerging markets and offers guidance for strategic management in difficult operational contexts. Results show that both platforms were able to improve their operations despite problems with their infrastructure. They did this by focussing on strategy, adopting new technologies, and coming up with new ideas that put customers first. However, both Jumia and Konga has achieved profitability through their hybrid model.

**Keywords:** E-commerce, Supply Chain Management, Business Model Innovation, Digital Transformation, Nigeria, Operational Excellence, Strategic Management

### **Introduction**

The e-commerce market in Nigeria is one of the most active and hard-to-navigate digital markets in Africa. It has a lot of potential for growth, but the infrastructure and operations have a lot of problems that make it hard to do business. In 2023, the e-commerce market in Nigeria was worth \$15 billion. By 2026, it is expected to be worth \$33 billion. This shows that it is growing quickly even though there are problems with the system. Nigeria is a key case study for learning about how e-commerce is changing in developing countries, especially when it comes to strategic adaptation and operational excellence.

Jumia Technologies AG and Konga are the two biggest companies that run the Nigerian e-commerce business. They have very different plans, but they both have the same problems with how they run their businesses. Jumia also has a group of salespeople called "J Force" who help customers in places where the internet or mobile service isn't very good. Konga has worked harder to give Nigerian shoppers the best mix of in-person and online shopping options since it got new owners in 2018.

From 2018 to 2024, both companies have had very important years. They have changed a lot about how they do business, including their strategies, technologies, and operations. This study looks at how the business models and supply chain strategies of these platforms have changed over time to deal with the unique problems of the Nigerian market, such as poor infrastructure, limited payment options, and worries about consumer trust.

The importance of this study resides in its analysis of strategic management principles applied to emerging market e-commerce, where conventional Western business models frequently necessitate considerable modification. Learning how Jumia and Konga have dealt with these problems can help other e-commerce platforms in developing markets and add to the body of research on digital transformation in developing economies.

## **2.0 Literature Review and Theoretical Framework**

### **2.1 E-commerce Evolution in Emerging Markets**

Emerging markets' e-commerce growth is very different from that of developed economies because of problems with infrastructure, low use of digital payments, and different levels of consumer trust in online transactions. Researchers who study e-commerce in emerging markets say that instead of just copying successful models from developed markets, businesses need to come up with strategies that are specific to each market's needs (Chen & Zhang, 2021; Kumar et al., 2020).

The theoretical framework for this study comes from the field of strategic management, specifically resource-based view theory and dynamic capabilities framework. These theories look at how companies develop and use unique resources and skills to get ahead of the competition in changing situations (Barney, 2018; Teece, 2019). This framework shows how Nigerian e-commerce companies change their strategies to fit the local market while also creating long-term competitive advantages.

### **2.2 Supply Chain Innovation in E-commerce**

Managing the e-commerce supply chain involves a lot of different tasks, like buying things, storing them, keeping track of stock, and getting things to the last mile. E-commerce logistics is the process of doing both business and logistics online. It is the combination of online shopping and logistical tasks. In emerging markets, where infrastructure problems require creative solutions, things get a lot more complicated.

Recent studies show that logistics performance is very important for the success of e-commerce, especially when it comes to last-mile delivery problems in developing economies (Williams & Johnson, 2022; Patel et al., 2023). In 2018, Nigeria was 112th in the Logistics Performance Index and 145th out of 190 countries for how easy it is to do business. This shows how tough it is for online stores to do business in the country.

### **2.3 Business Model Innovation in Digital Platforms**

Digital platform business models have changed from simple online stores to complicated networks that offer many services, such as payments, logistics, and financial services. The literature on platform business models stresses the significance of network effects, multi-sided markets, and ecosystem orchestration (Parker et al., 2021; Gawer, 2020).

In Nigeria, successful e-commerce platforms have created hybrid models that combine online and offline touchpoints to meet the needs of customers and the limitations of the country's infrastructure. This omnichannel approach is a big change from traditional e-commerce models to fit the needs of the local market.

## **3.0 Research Methodology**

This study employs a qualitative case study methodology, examining the strategic evolution of Jumia and Konga through analysis of multiple data sources including financial reports, company announcements, industry reports, and secondary literature. The research focuses on the period from 2018 to 2024, chosen because this timeframe encompasses significant strategic transformations for both companies.

Data collection involved systematic analysis of publicly available financial reports, SEC filings, company press releases, and industry publications. The study also incorporated analysis of market research reports from reputable sources including Statista, ResearchAndMarkets, and specialized African market research firms.

The analytical approach follows established case study methodology, employing within-case analysis for each company followed by cross-case comparison to identify common patterns and distinctive strategies. The research examines strategic decisions, operational changes, and performance outcomes across multiple dimensions including financial performance, operational metrics, and market positioning.

Limitations of this methodology include reliance on publicly available information, which may not capture all internal strategic considerations, and the dynamic nature of the e-commerce industry, which means that strategies and outcomes continue to evolve beyond the study period.

## **4.0 Case Analysis: Jumia's Strategic Evolution**

### **4.1 Business Model Transformation**

From 2018 to 2024, Jumia changed from aggressively expanding to focussing on optimising and making money. In October 2024, Jumia made the strategic choice to leave South Africa and Tunisia and focus on Nigeria and other important markets instead. This strategic consolidation is part of a bigger trend towards long-term growth instead of expanding the market at any cost.

There are a few important parts to the company's business model evolution. Jumia started out by trying to expand its marketplace to more African countries. Over time, it has narrowed its focus to certain markets while strengthening its presence in those markets. By leaving South Africa and Tunisia, which were not strategic markets for Jumia, the company was able to focus its resources and improve its operational efficiency.

The way Jumia makes money has changed a lot too. Jumia's revenue fell by 10% to \$167.5 million in 2024. This was because the e-commerce company was still cutting costs, but it was also making operational improvements at the same time. The company changed its strategic approach by focussing on sustainable unit economics instead of just growth metrics.

The platform's marketplace model has been improved to focus on the quality of sellers and the happiness of customers rather than just the number of sales. International sellers' supply grew quickly, making up 31% of items sold in the fourth quarter of 2024. This is a 9.5 percentage point increase from the fourth quarter of 2023. This diversification of supply sources shows that the company is strategically adapting to improve the variety of its products and its prices.

### **4.2 Supply Chain and Logistics Innovation**

Jumia has made big changes to its supply chain strategy, focussing on consolidation and making things more efficient. Jumia opened an integrated warehouse in Nigeria in May 2024. This brought all of its operations together and increased its storage space. This investment in infrastructure shows that the company is dedicated to improving operations and cutting costs.

The logistics network has been strategically changed to make it more efficient and save money. The cost of fulfilment was \$10.3 million, which is a 5% increase from last year or a 22% increase from last year when the currency stayed the same. This rise was mostly caused by one-time costs related to ongoing warehouse consolidations and an increase in orders. Costs went up in the short term because of consolidation activities, but the goal is to make things more efficient in the long term.

Jumia also started a new business line called Jumia Delivery, which is a third-party logistics service in Nigeria. This move into logistics services is a way to diversify beyond core e-commerce operations. It could lead to new sources of income while making use of investments already made in infrastructure.

Jumia's logistics performance shows how hard it is to do business in Nigeria's infrastructure. Even when delivering orders to customers' homes, pothole-ridden roads and hard-to-find addresses make things less efficient, especially in remote areas of Nigeria, Uganda, and other rural areas. These operational realities have required adaptive strategies and substantial infrastructure investment.

#### **4.3 Technology and Payment Systems**

JumiaPay is a key part of Jumia's strategic evolution. It solves the main problem with payment systems in Nigeria's cash-dominated economy. There were also 10.1 million JumiaPay transactions, which was a 20% increase from the previous year. The total payment volume (TPV) rose slightly to \$195.4 million. This growth shows that more people in Jumia's ecosystem are using digital payment solutions.

In May 2024, Jumia Nigeria started two new Buy Now, Pay Later partnerships with Easybuy and CredPal. The goal was to make it easier for Nigerian customers to access Jumia's marketplace and make purchases while spreading out their payments over a set period of time. These partnerships help make transactions without cash more common while also making them more affordable.

The changes to the payment system show that the company is adapting its overall strategy to fit the needs of the local market. For example, Nigeria's cash transactions dropped from 95% in 2019 to 80% in 2022, which is a sign of this change. Jumia's new ways of accepting payments put the company in a good position to take advantage of this slow shift towards digital payments.

#### **4.4 Financial Performance and Operational Metrics**

Jumia's financial path from 2018 to 2024 shows how hard it is to make money in Nigeria's e-commerce market. The company's operating loss went down by 10% from the previous year to \$66 million, which shows that it was able to run its business more efficiently. Even though the company isn't making money yet, it has shown that it is making progress towards being financially stable.

Even though these customers left, the number of active customers only dropped by 5%, from 5.7 million in 2023 to 5.4 million in 2024. This shows that customers are still using the service even though the company is leaving certain markets. This steady customer base and smaller operational scope suggest that each customer is getting more done.

The company's order growth is a good sign: But the number of orders went up by 6% to 22.7 million. In Q4 2024, 56% of all orders came from upcountry regions, up from 49% in Q4 2023. This move towards secondary cities and rural areas shows that the market has successfully expanded beyond urban centres.

### **5.0 Case Analysis: Konga's Strategic Evolution**

#### **5.1 Omnichannel Business Model Development**

Konga's strategic evolution has been marked by the creation of a complex omnichannel model that combines online and offline shopping experiences. The new company has been able to cut costs by 65% and increase revenue by eight times every year since the operational merger. After the 2018 merger with Yudala, which combined complementary skills and market positions, this amazing improvement in performance happened.

The omnichannel strategy solves some of the biggest problems in the Nigerian market, where consumers don't trust businesses and infrastructure is limited, so they need physical locations. Konga has given millions of sceptical or underserved Nigerians a way to actively participate in e-commerce through its network of retail stores across the country. This method understands that to be successful in e-commerce in Nigeria, you need to be able to meet the needs of different customers and use different technologies.

Konga's network of physical stores does more than just sell things; it also serves a number of strategic purposes. We started letting people order from our stores last year, and since then, orders from our stores have gone up by 2,000

percent. This huge increase shows that using physical stores as order fulfilment points works, since it solves both trust and logistics problems.

In the Nigerian market, combining online and offline channels creates a unique value proposition. People all over Nigeria can go to a Konga store of their choice to pay for and pick up any item they want. For many others, the store is a convenient place to pick up their online orders. This flexibility meets the needs of different customers while also making logistics more efficient.

## **5.2 Technology Infrastructure and Innovation**

Konga has put a lot of money into scalable, cloud-based solutions that support its omnichannel operations. Konga, Nigeria's online marketplace, saved \$55,000 a month on cloud infrastructure costs by switching to a containerised solution on Google Kubernetes Engine. This 65% drop in costs shows that technology optimisation works while still keeping the ability to do business.

The change in technology also led to improvements in how the business worked as a whole. In some applications, server response times have gone up by 5%, while in others, they have gone up by 400%. These improvements in performance have a direct effect on customer satisfaction and operational efficiency, which gives the company a competitive edge.

Konga's technology strategy focusses on making things run smoothly and being able to grow. The fact that Konga IT staff don't have to worry about maintaining and managing infrastructure as much means they can focus on innovation and growth instead. This strategic approach to technology shows that you have a mature understanding of how technology can help you reach your business goals.

The platform's architecture makes it easy for the company to use both online and offline operations, which is part of its omnichannel strategy. This technological base is very important for keeping track of the many sales channels, inventory systems, and customer touchpoints.

## **5.3 Supply Chain and Logistics Excellence**

Konga's supply chain strategy is based on its own logistics company, K-Express, which does most of the company's deliveries. Konga has expanded the operations of its delivery subsidiary Kxpress in the logistics field. Kxpress handles 95% of Konga's orders and delivers them by truck, van and motorcycle. This high level of control over logistics leads to better service and lower costs.

The company has spent a lot of money on warehouse infrastructure to help its business. Konga's main distribution centre in Lagos is a 60,000-square-foot, state-of-the-art warehouse that holds more than 200,000 items. This level of investment in infrastructure shows a commitment to operational excellence and customer service.

Technology and process improvements have steadily made Konga's fulfilment capabilities better. The new plan will cut the time it takes for merchants to process orders from 40 hours to 3 hours, which is a 90% cut. This huge increase in processing speed directly helps both merchants and customers while also lowering costs for the business.

The "Fulfilled by Konga" program is a strategic step towards making the marketplace easier to use while keeping service quality high. "Fulfilled by Konga" will let thousands of Nigerian online sellers who currently sell through Konga store their goods in Konga warehouses and then have Konga's own fulfilment team deliver the orders. This expansion of services creates new ways for the company to make money while making use of investments in infrastructure that are already in place.

## **5.4 Payment Innovation and Financial Services**

KongaPay is a key part of Konga's strategy for standing out from the competition. It offers integrated payment solutions that work in Nigeria's difficult payment environment. KongaPay was first introduced in 2015 as a test

product in collaboration with Nigerian commercial banks. It was only available to customers on Konga.com's platform. This early investment in payment infrastructure has given the company an edge over its competitors and made customers trust them.

The payment platform deals with basic trust problems in Nigeria's online shopping market. KongaPay solved the problem of not trusting online payments by making it possible for anyone to use Konga's website. KongaPay makes it easier for more people to participate in the market by offering safe and dependable payment options.

Konga has also made sure that this recurring problem is going away by forming strategic partnerships with top payment solutions providers like Visa. These partnerships make it easier to pay for things and make people feel more comfortable with digital transactions.

The wide range of payment options shows that the company knows what Nigerian customers want. These include cash payments in all of its stores across the country, payment on delivery (which it reintroduced in August 2018), and payment when items are picked up. This flexibility works with different levels of comfort with digital payments while slowly pushing people to use electronic payment methods.

## **5.5 Organizational Development and Expansion**

Konga's organisational evolution is a result of strategic changes made in response to market opportunities and operational needs. We also added new business units to the family when Konga Travels started in February 2019, Konga Health started in October 2019, and Konga Foods started in December 2019. This diversification creates more ways for customers to connect with the company while making use of its current infrastructure and customer relationships.

The company's plan for growth focusses on long-term success and doing things right. We want to be the driving force behind trade in Africa, and in five years we want to be in ten countries. This big goal is balanced by a focus on quality of operations and customer service.

The company is also expanding into travel, food, and health, in addition to expanding geographically. It has also made important investments in warehousing infrastructure, with two new facilities in the north and southeast of Nigeria. This balanced way of growing takes into account both service variety and geographic coverage.

## **6.0 Comparative Analysis: Strategic Convergence and Divergence**

### **6.1 Market Positioning and Competitive Strategy**

Jumia and Konga have both changed how they position themselves in the market because of competition and the market's growth. Their strategies, on the other hand, show that they have very different ideas about how to do well in Nigeria's tough e-commerce market.

Jumia's plan is to grow and become the market leader by focussing on certain areas. Jumia expects GMV to grow by 10% to 15% by 2025, which would mean a range of \$795 million to \$830 million. This growth forecast, though modest, is based on realistic expectations given the state of the market and the limits of the business.

Konga's positioning focusses on the quality of service and the customer experience through the integration of multiple channels. Konga delivered 85% of all orders placed on its online and offline platforms to the last mile, according to data. This high fulfilment rate shows that the company is doing a great job and cares about its customers, which helps set the brand apart.

The competition between the platforms has changed from just trying to get more market share to offering different value propositions. Jumia is more focused on the breadth of its marketplace and giving sellers access to it from anywhere in the world. Konga, on the other hand, is more focused on service reliability and convenience across all channels.

## **6.2 Technology Adoption and Innovation**

Both companies have put a lot of money into technology, but they have different strategic goals. Jumia's technology strategy is all about making the marketplace work better and cutting costs, while Konga's is all about making the customer experience better and making operations work together.

More and more businesses are using digital technologies to make their supply chains more efficient and add more value. Both platforms have embraced this trend by adding advanced analytics, automated warehousing systems, and payment systems that work together.

The way people use technology shows how they plan to grow their businesses. Jumia's investments focus on the number of transactions and how well the business runs, while Konga's technology choices focus on the quality of service and how happy customers are.

## **6.3 Supply Chain Strategies**

Managing the supply chain is a key difference between the two platforms. The logistics sector in Nigeria was worth \$584 million (250 billion naira) in 2018, which is \$117 million (50 billion naira) more than it was worth in 2017. Both companies have put a lot of money into their logistics capabilities, but they have different plans for how to do it.

Jumia's supply chain strategy focusses on making things more efficient and bringing them all together. The warehouse consolidation program and the move into third-party logistics services show that the company is focused on getting the most out of its operations and cutting costs. This method puts scalability and unit economics ahead of service differentiation.

Konga's supply chain strategy puts a lot of emphasis on control and service quality. The creation of K-Express as a private logistics service and a large network of warehouses shows a commitment to customer service and reliability. This method puts customer satisfaction and brand differentiation first.

## **6.4 Financial Performance and Sustainability**

The financial paths of both companies show different ways to become sustainable in Nigeria's tough market. In 2024, Jumia kept working to cut costs. It reported a 10% drop in both revenue and operating loss, even though orders outside of cities went up. This performance shows that the company is making progress towards profitability by becoming more efficient in its operations, not by increasing its sales.

Konga's financial success shows how important it is to have a clear strategy and do things well. Forbes said that Konga, which was bought by the Zinox Group in 2018 and has grown a lot since then, could be worth more than \$2 billion when it finally goes public. This valuation estimate points to strong business performance and the possibility of growth.

The different ways of handling money show different ideas about how to make e-commerce in emerging markets more sustainable. Jumia's way focusses on volume and efficiency, while Konga's way focusses on margins and customer value.

## **7.0 Strategic Implications and Industry Insights**

### **7.1 Adaptation to Local Market Conditions**

The development of both platforms shows how important it is to adjust international e-commerce models to fit local market conditions. In Nigeria, people still heavily rely on cash-based payment methods. This is shown by the fact that 23% of online sales in Nigeria are paid for through this channel. Both companies have come up with smart ways to meet cash needs while also promoting the use of digital payments.

Nigeria's infrastructure problems have forced people to come up with new ideas that might work in other emerging markets as well. The logistics industry in Nigeria is very important for the country's economy to grow. Even though the logistics industry is growing quickly, Nigeria's full economic potential can't be reached until some problems are solved. Both platforms have come up with ways to work within the limits that are already in place while slowly improving the capabilities of the infrastructure.

Trust in consumers is still a big problem that needs a lot of different solutions. Both companies have put money into things like having a physical presence, secure payment systems, and good customer service to build trust and credibility in a market where online shopping is still growing.

## **7.2 Technology as Competitive Advantage**

Patterns of technology adoption show how businesses can get ahead of their competitors by making smart technology choices. To better meet their supply chain commitments, companies need to find ways to make their supply chains more resilient. Both platforms have used technology to make their operations more resilient and stand out from the competition.

Both companies' investments in technology show that they know that having unique capabilities is necessary for long-term competitive advantage, not just using standard solutions. Konga's optimisation of its infrastructure and Jumia's marketplace technology are two different ways to build technological moats.

Adopting AI and automation is becoming more and more important for running a business efficiently. In 2024, 30% of businesses plan to invest in new technologies like automation to meet their supply chain-related business commitments. Both platforms are set up to benefit from more people using technology and automation.

## **7.3 Business Model Innovation**

The development of both platforms shows how coming up with new business models can give you an edge in tough markets. Konga's omnichannel model and Jumia's marketplace consolidation are two different ways to run a business that will last.

The success of hybrid models that combine digital and physical capabilities suggests that online-only models may not be enough to succeed in emerging markets. Physical touchpoints serve many purposes, such as building trust, fulfilling orders, and providing customer service. Because of this, they should be an important part of business model design rather than just temporary fixes.

The move into financial services, logistics, and other related services shows that the ecosystem approach is needed for success in emerging markets. Both companies have realised that to stay ahead of the competition, they need to control important parts of the value chain instead of relying on outside providers that aren't very good.

## **8.0 Challenges and Future Outlook**

### **8.1 Operational Challenges**

Even though both platforms have made a lot of progress, they still have a lot of operational problems to deal with. Logistics is very risky because the roads are in bad shape and traffic jams happen. Infrastructure limitations continue to be a major problem for operational efficiency and cost structure.

Payment failure rates in Nigeria can be as high as 70%, so we keep coming up with new ways for our customers to pay us so they can do business with us. The reliability of payment systems still needs ongoing investment and new ideas, which is both a challenge and an opportunity for companies to stand out from the competition.

The rise of global platforms means more competition, which means we need to change our strategies. Temu started doing business in Nigeria in November 2024 and often sells the same types of products for 30–70% less than Jumia.



Because of this pressure on prices, we need to keep focussing on our value proposition and how well we run our business.

## **8.2 Market Evolution and Opportunities**

The Nigerian e-commerce market is changing quickly, which is good and bad for established platforms. The Digital Payments market in Nigeria is expected to grow by 22.66% between 2024 and 2029, reaching a volume of US\$154.50 billion by 2029. Both platforms should benefit from this growth in digital payments infrastructure because it will make payments easier and open up new business models.

Over 70% of online transactions in Nigeria happen on mobile devices, which is a big deal for mobile e-commerce. As mobile commerce grows, businesses need to keep spending money on mobile-friendly features and experiences.

Both platforms have a lot of room to grow in rural markets. Upcountry regions made up 56% of all orders in Q4 2024, up from 49% in Q4 2023. This shows that Nigeria could continue to grow geographically.

## **8.3 Strategic Recommendations**

After looking at how both platforms have changed over time, here are some strategic suggestions for e-commerce businesses that work in similar emerging market conditions:

First, it seems that hybrid business models that combine online and offline features are important for building trust and meeting the needs of different types of customers. In markets with infrastructure problems and trust issues, pure-play online models may not be enough to reach scale and profitability.

Second, putting money into your own logistics and payment systems gives you an edge over your competitors and lets you control your operations. Using poorly built external infrastructure makes it hard for businesses to grow and for customers to have a good experience.

Third, businesses should focus on how technology will improve their operations and the customer experience, not on how many features it has. When resources are limited, investments in technology must provide clear operational benefits and a competitive edge.

Fourth, focussing on certain areas and dividing the market into groups are important for making operations run smoothly. Both platforms have done better by focussing on a few key markets instead of trying to serve them all equally.

## **9.0 Conclusion**

The strategic evolution of Jumia and Konga from 2018 to 2024 offers significant insights into the development of e-commerce in emerging markets. While both companies have used different strategic approaches to achieve sustainability and growth, they have both shown a remarkable ability to adapt to local market conditions.

Jumia's plan to consolidate its operations and improve its efficiency in different areas has helped it move closer to profitability, even though the market is tough. The company's focus on cutting costs and being selective about where it does business is a realistic way to ensure long-term survival. But competition from global platforms and local options may force further strategic changes.

Konga's strategy of using many channels and putting a lot of emphasis on service quality has helped it make money and do well in Nigeria. The company's ability to combine online and offline services gives it a competitive edge and adds value for customers that seems to be long-lasting in the Nigerian market. The success of this model indicates its potential applicability to other emerging markets exhibiting analogous characteristics.

Both companies have shown that e-commerce businesses in developing countries need to make major changes to traditional e-commerce models in order to be successful. To be successful, it seems important to combine physical and digital capabilities, invest in your own infrastructure, and make it easy for customers to pay in the way they prefer.

The study shows that operational excellence and a focus on strategy are more important than rapid growth for staying in business in tough market conditions. Both companies have done well by putting service quality and customer satisfaction ahead of pure growth metrics.

As Nigeria's digital infrastructure and consumer behaviour continue to change, both platforms will face new opportunities and problems. To be successful, businesses will probably need to keep coming up with new ideas for how they do things, adopt new technologies, and improve the customer experience, all while staying disciplined and focused on their goals.

Jumia and Konga's experiences teach other e-commerce platforms in emerging markets important lessons and help us understand how digital transformation is happening in developing economies. Their strategic changes show how businesses can gain a long-term competitive edge by focussing on localised innovation and operational excellence.

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