



Universidade de São Paulo
B R A S I L



***A pesquisa em internacionalização de empresas:
um estudo sobre as empresas brasileiras***

AFONSO FLEURY

Observatório da Inovação USP

14 de Setembro de 2009

AGENDA

1. *O projeto GINEBRA*
2. *Posicionamento teórico-conceitual*
3. *Primeiros resultados da pesquisa*
4. *Implicações*
5. *Perspectivas*

Sobre quem estamos falando? Os late-movers ...

- ***Brasil*** (aproximadamente 40): *Embraer, CVRD, Gerdau, Petrobras*



- ***Russia***: *Severstal, Lukoil, Sukhoi*



- ***India***: *Mittal, Tata Group, Reliance Group, Rambaxy*



- ***China***: *Lenovo, Haier, Huawei, SAIC*



- ***Mexico***: *Cemex, Telmex, Nemak*

- ***Turkey***: *Vestel Group*



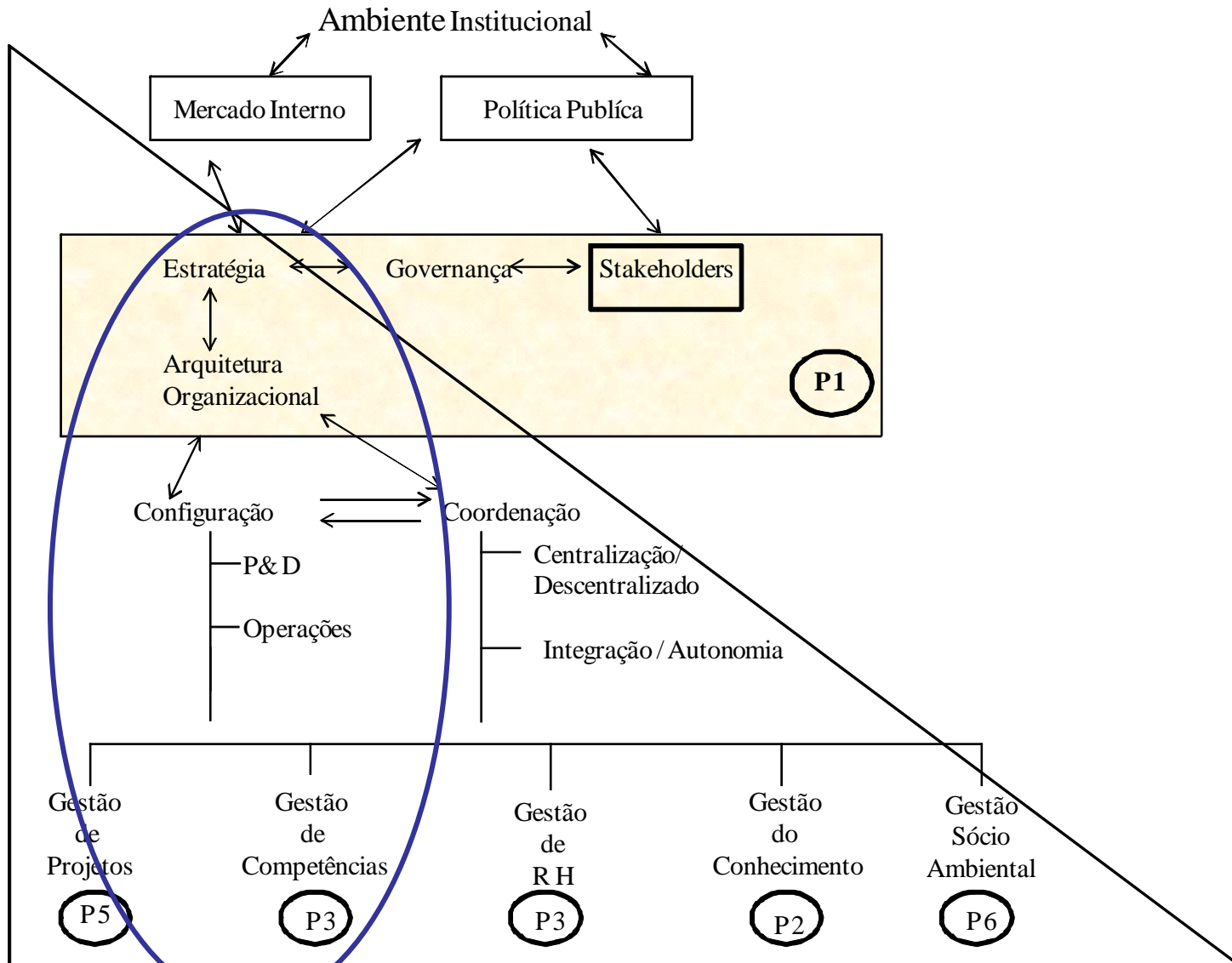
- ***South Africa***: *SAB*

Projeto: “Gestão empresarial para a internacionalização das empresas brasileiras” (NPGT/USP)/FAPESP

Temas / sub-projetos

- 1. Estratégias de internacionalização e arquiteturas organizacionais**
- 2. Gestão do conhecimento**
- 3. Gestão de competências**
- 4. Gestão de P&D internacional**
- 5. Gestão de projetos globais**
- 6. Gestão sócio-ambiental**
- 7. Políticas públicas**

GINEBRA - Quadro Referencial



Subprojeto 3 – Gestão de competências e internacionalização

Referencial teórico

- ***Resource Based View of the Firm***
- ***Competence Based Competition***

Campos de Conhecimento

- ***International Business***
- ***International Management***
- ***International Operations***

1950

INTERNATIONALISATION

2000

THE
FIRST
WAVE

| |
|-------------------------------------------|
| AMERICAN/ UK, GERMAN, FRENCH |
| CLASSICAL THEORY/ECLECTIC PARADIGM |

| |
|----------------------------------------------------|
| SCANDINAVIAN |
| THE NORDIC SCHOOL: GRADUALISM, LEARNING |

THE
SECOND
WAVE

| |
|-----------------------------------------------------|
| JAPANESE FIRMS |
| LEARNING TO CATCH-UP, MARKET POSITIONING |

THE
THIRD
WAVE

| |
|--------------|
| BRICS |
| ? |

1950 → PROCESSO DE INTERNACIONALIZAÇÃO → 2000

WESTERN
ADVANCED
COUNTRIES

TRANSFER PRODUCTS &
PROCESSES
REPRODUCE AND ADAPT

“PRODUCTIVE
OR INDUSTRIAL
RESTRUCTURING”

RE-CONFIGURATION
OF GLOBAL
PRODUCTION
SYSTEMS

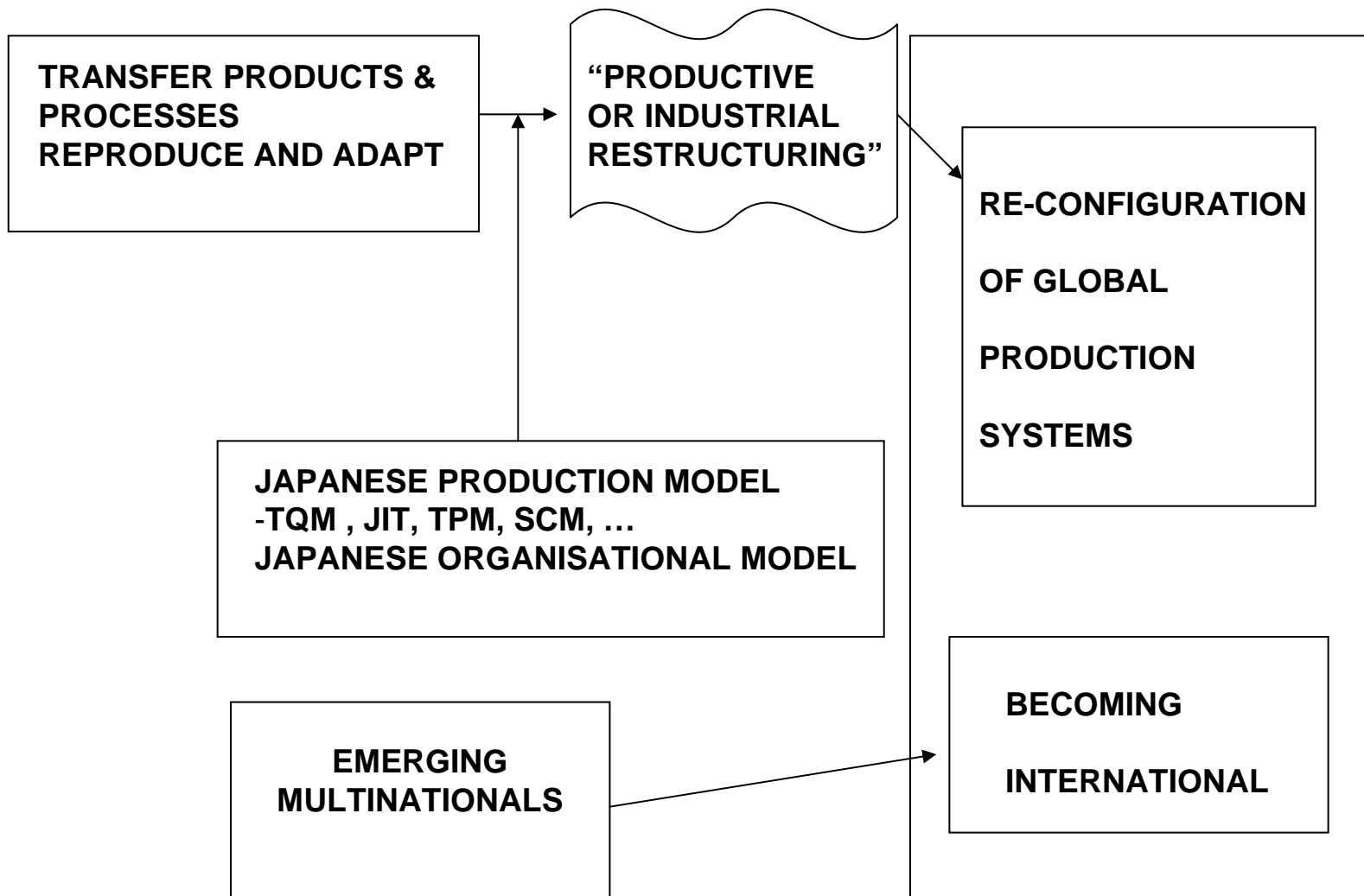
JAPAN

JAPANESE PRODUCTION MODEL
-TQM , JIT, TPM, SCM, ...
JAPANESE ORGANISATIONAL MODEL

BRICS

EMERGING
MULTINATIONALS

BECOMING
INTERNATIONAL



The role of manufacturing in the 1st and 2nd waves

**Western
Advanced
Countries**

Decide > transfer > adapt

***The Nordic
approach***

Decide > experiment > learn > transfer

Japan

Learn > catch-up > innovate > transfer (greenfields)

BRICS

?

PARA ESTUDAR OS LATE-MOVERS

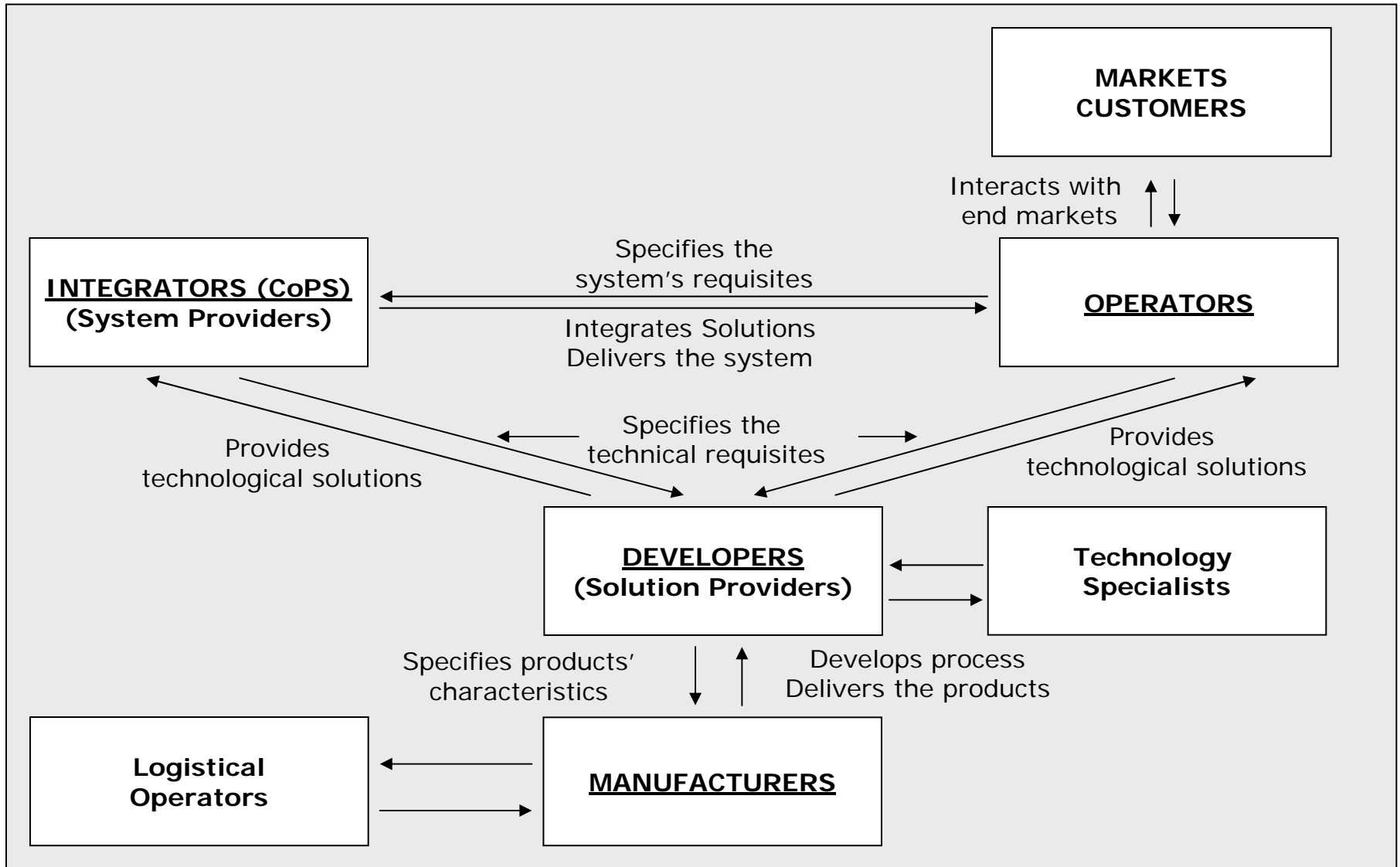
EM PARTICULAR AS EMPRESAS BRASILEIRAS

A internacionalização das empresas dos chamados países emergentes (BRIC) está relacionada ao reposicionamento e reconfiguração das early-movers

Como descrever esse movimento de reposicionamento e reconfiguração?

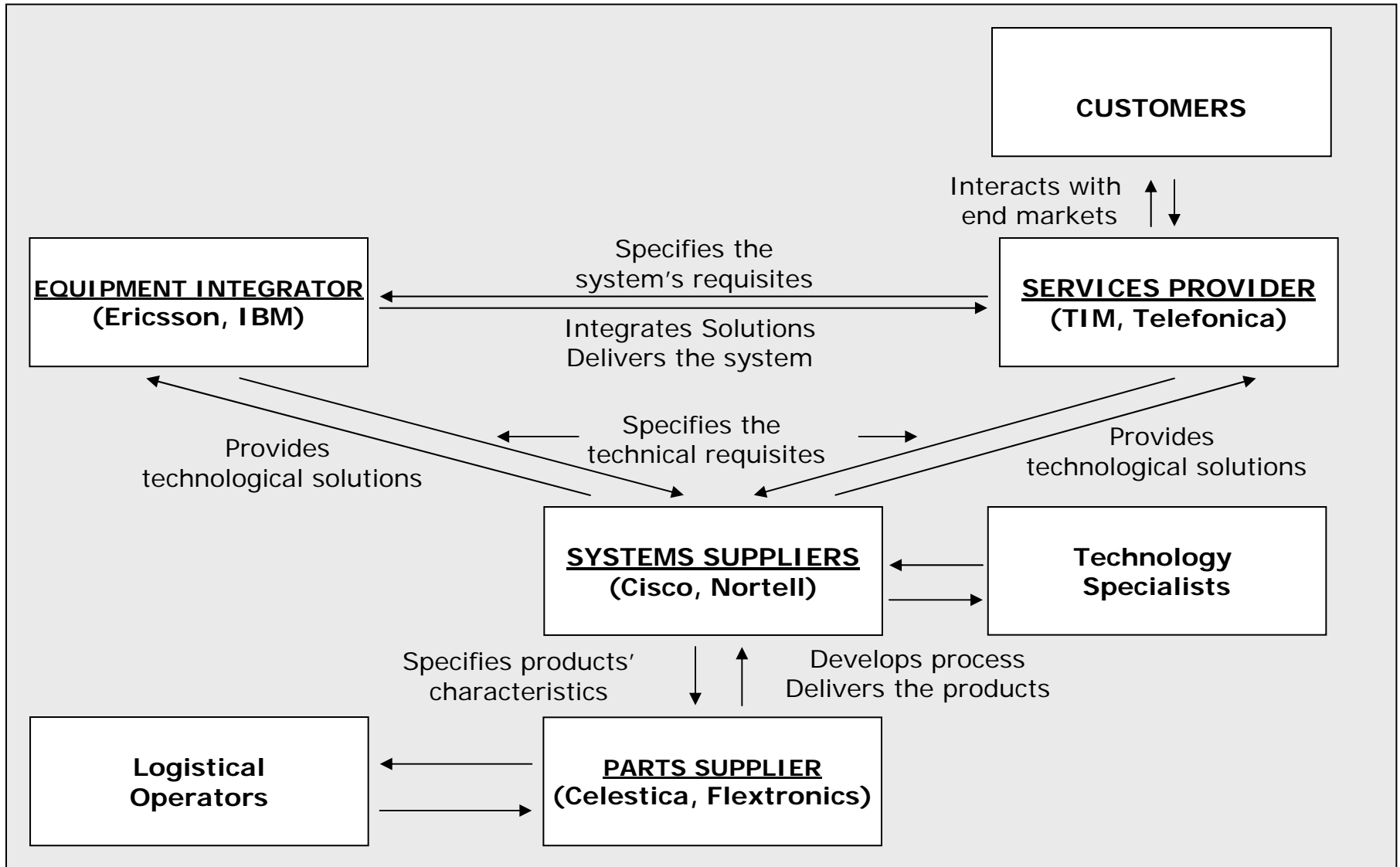
Qual referencial analítico utilizar?

THE COMPETENCE POSITIONING FRAMEWORK
Fleury e Fleury, JMTM, 2007



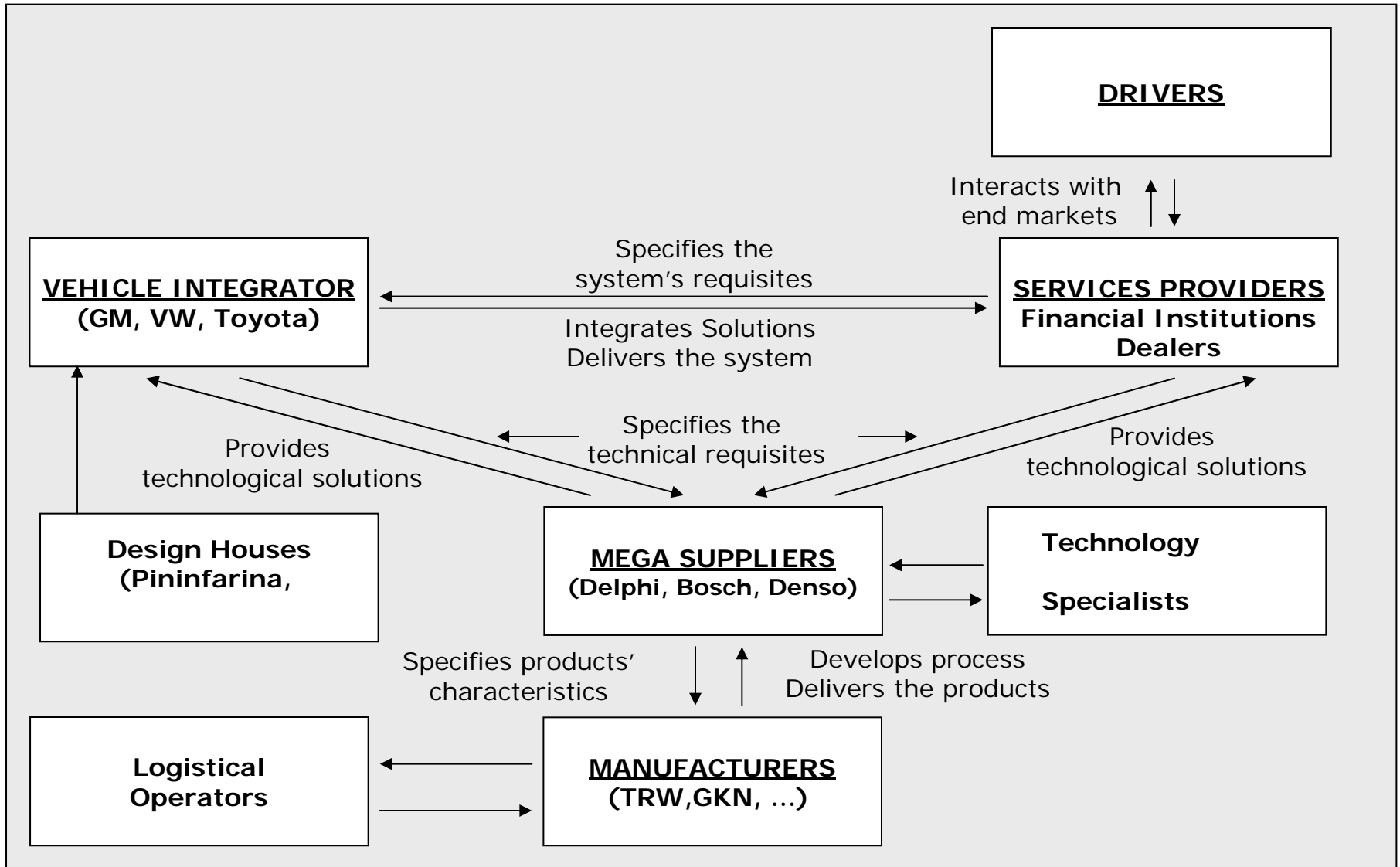
THE COMPETENCE POSITIONING FRAMEWORK

Exemple: Telecommunications



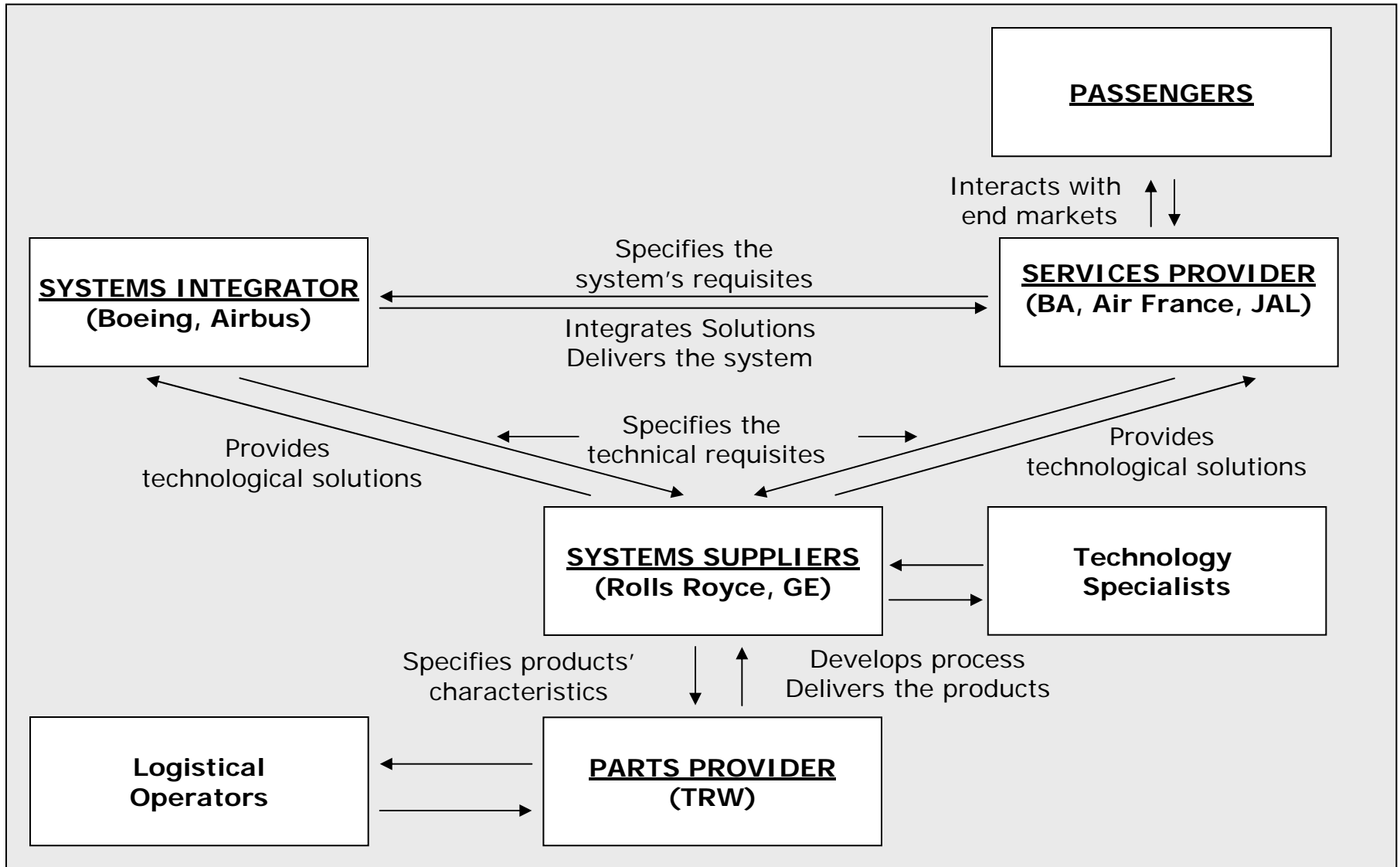
THE COMPETENCE POSITIONING FRAMEWORK

Exemple: Auto Industry, GM case



THE COMPETENCE POSITIONING FRAMEWORK

Exemple: Air Transportation

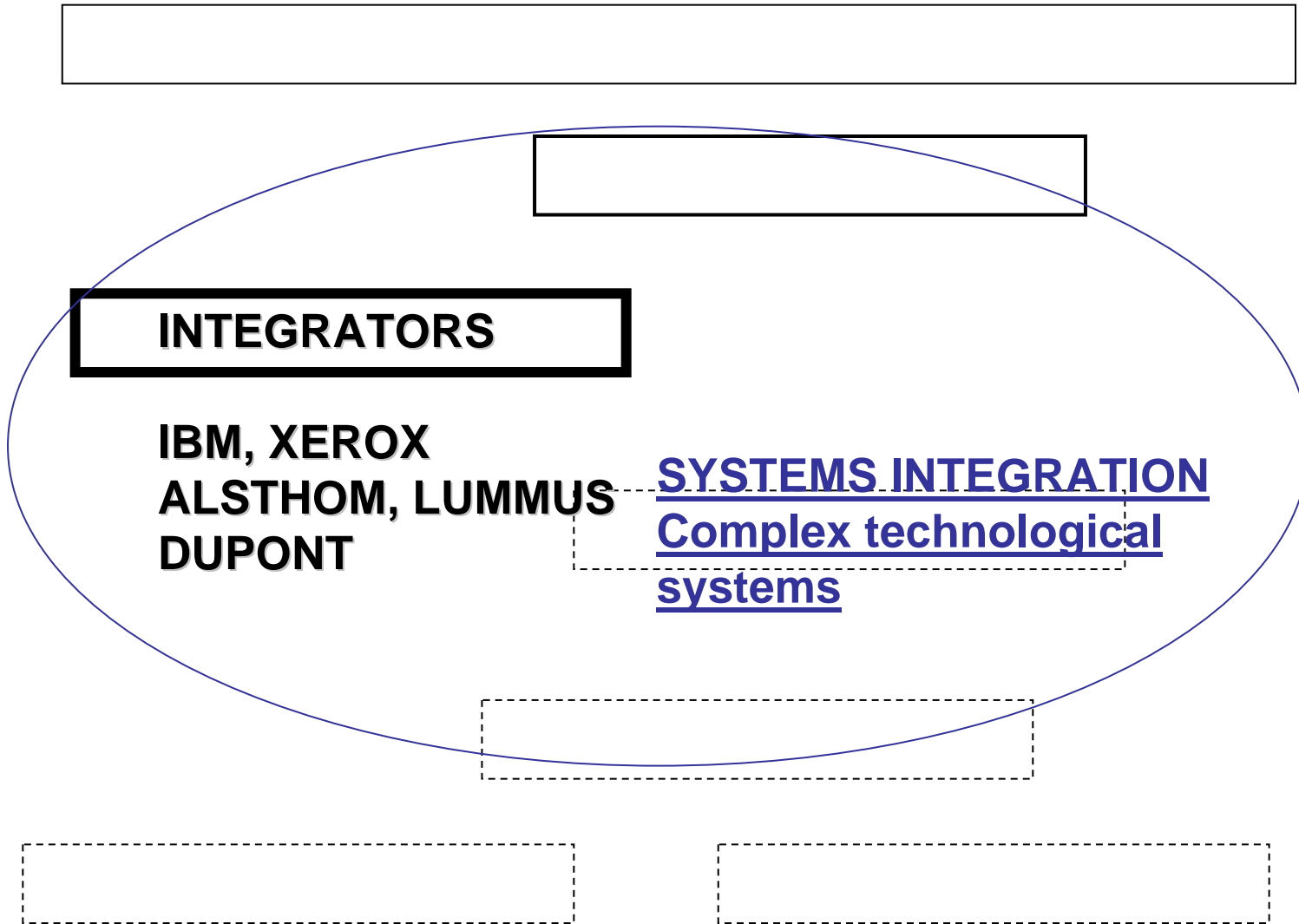


MARKETS – INDIVIDUAL CUSTOMER

OPERATORS

MARKET
RELATIONSHIPS

**WALMART, CARREFOUR
BRITISH AIRWAYS, AA,
GAP, PRADA, L&V, NIKE
VISA, AMEX, MC
TELEFONICA, VODAFONE**



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R&D
Innovative products

DEVELOPERS

**NOKIA,
CISCO, ORACLE, SAP
GE, ROLLS ROYCE,
BOSCH,**

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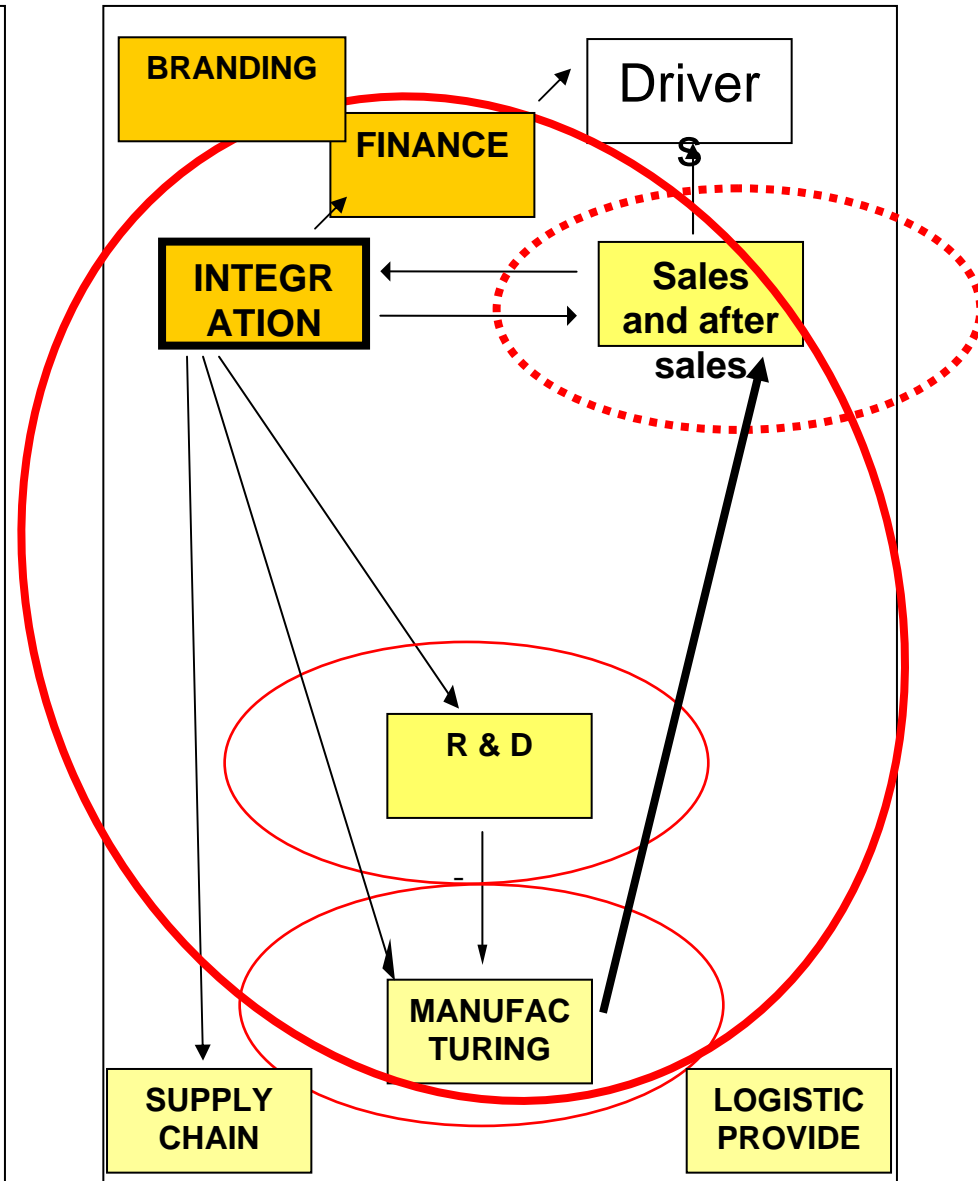
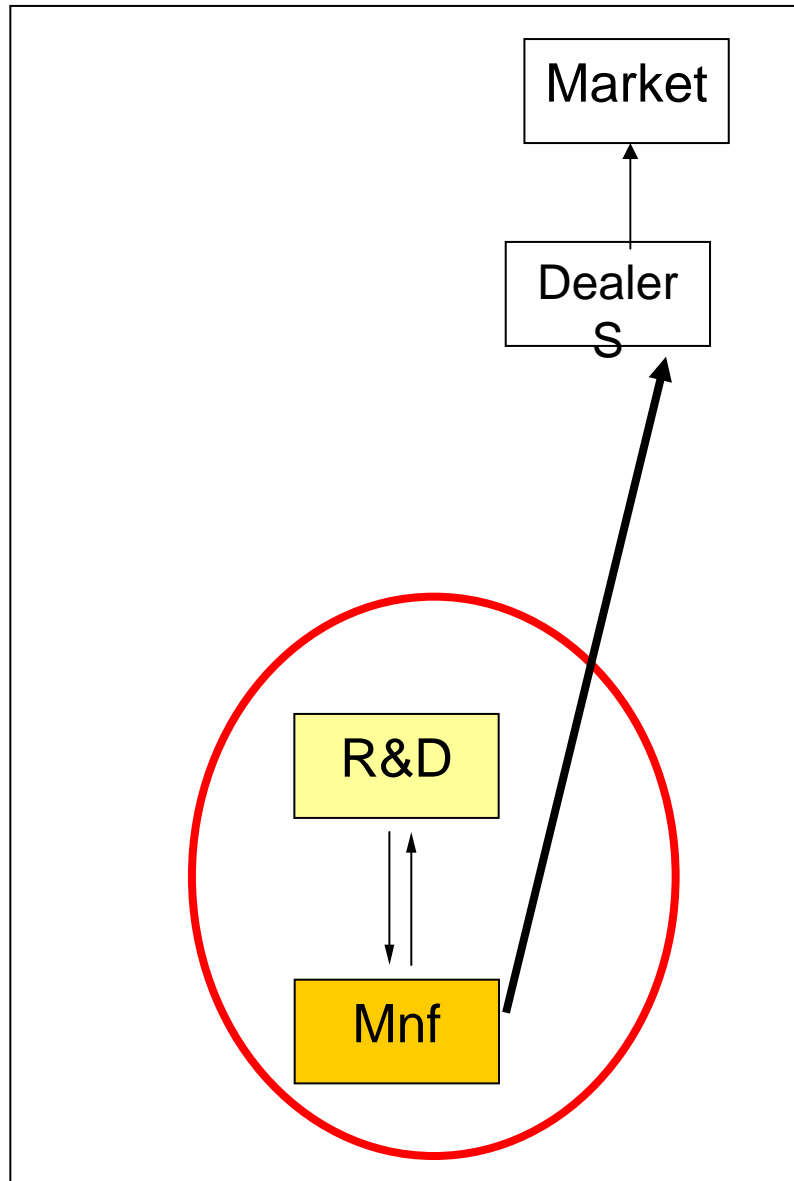
PROCESS ENGINEERING

MANUFACTURERS

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**FLEXTRONICS, CELESTICA
MITTAL/ ARCELOR, CVRD,**

The evolution of the competence's profile of the (ex) auto assemblers



Questão de Pesquisa

Como caracterizar o processo de internacionalização das empresas Brasileiras?

Quais são as competências que provem vantagens competitivas?

DIFERENTES SETORES INDUSTRIAIS

- Baseados em Recursos Naturais
Petrobras. CVRD



- Fornecedores de Insumos Básicos
CSN, Gerdau



- Fornecedores de Materiais de Construção
Tigre, Duratex



- Produtores de Bens de Consumo
Ambev, Coteminas



- Produtores de Componentes e Subsistemas
Embraco, Weg, Sabo



- Montadores de Sistemas
Embraer, Marcopolo



... e Serviços

- **Serviços de Engenharia**
Odebrecht,
- **Serviços**
Fogo de chão,
Downstream O&G: PB
- **Entretenimento**
Globo
- **Bancos**
Itaú, Banco do Brasil,
- **Software**
Stefanini, Datasul

ODEBRECHT
Engenharia e Construção



RESEARCH DESIGN

- 1) *Pilot studies (five cases)***
- 2) *Survey (30 Headquarters and 68 subsidiaries)***
- 3) *In-depth case studies (12 cases)***

The structure of the survey

30/42 Brazilian MNEs
11 industries
subsidiaries in all continents

Competences / Functions

Manufacturing

R & D

Sales and Marketing

Finance

Human Resources Mngt

Clients' relationships

Suppliers' relationships

Information Technology

Planning

Business Model

Three moments in time

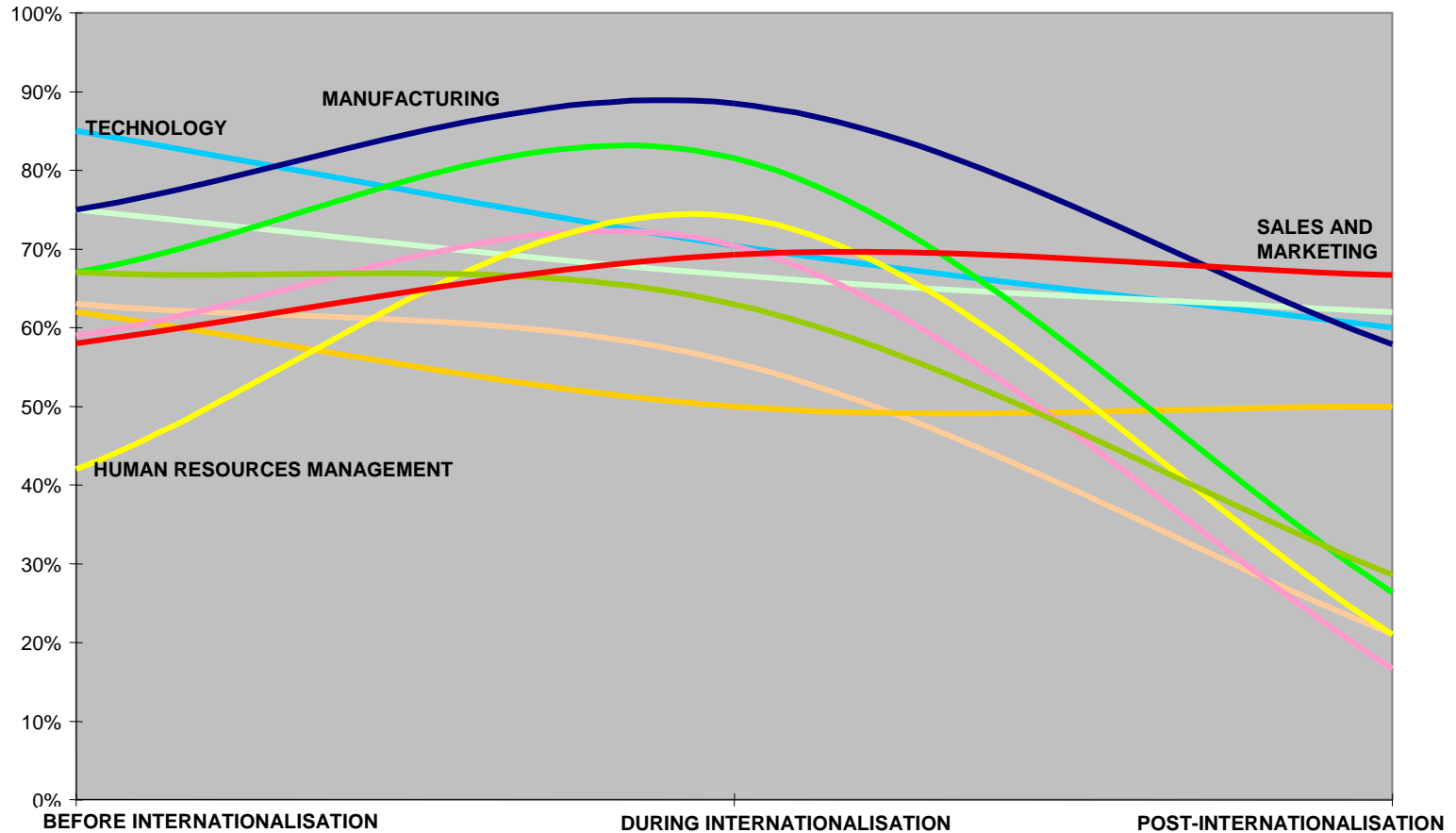
before internationalisation

entry

expansion

RELATIVE IMPORTANCE OF ORGANISATIONAL FUNCTIONS IN THE INTERNATIONALISATION PROCESS

(Survey among 30 Brazilian MNEs)



SELECTED CASE STUDIES

MANUFACTURERS

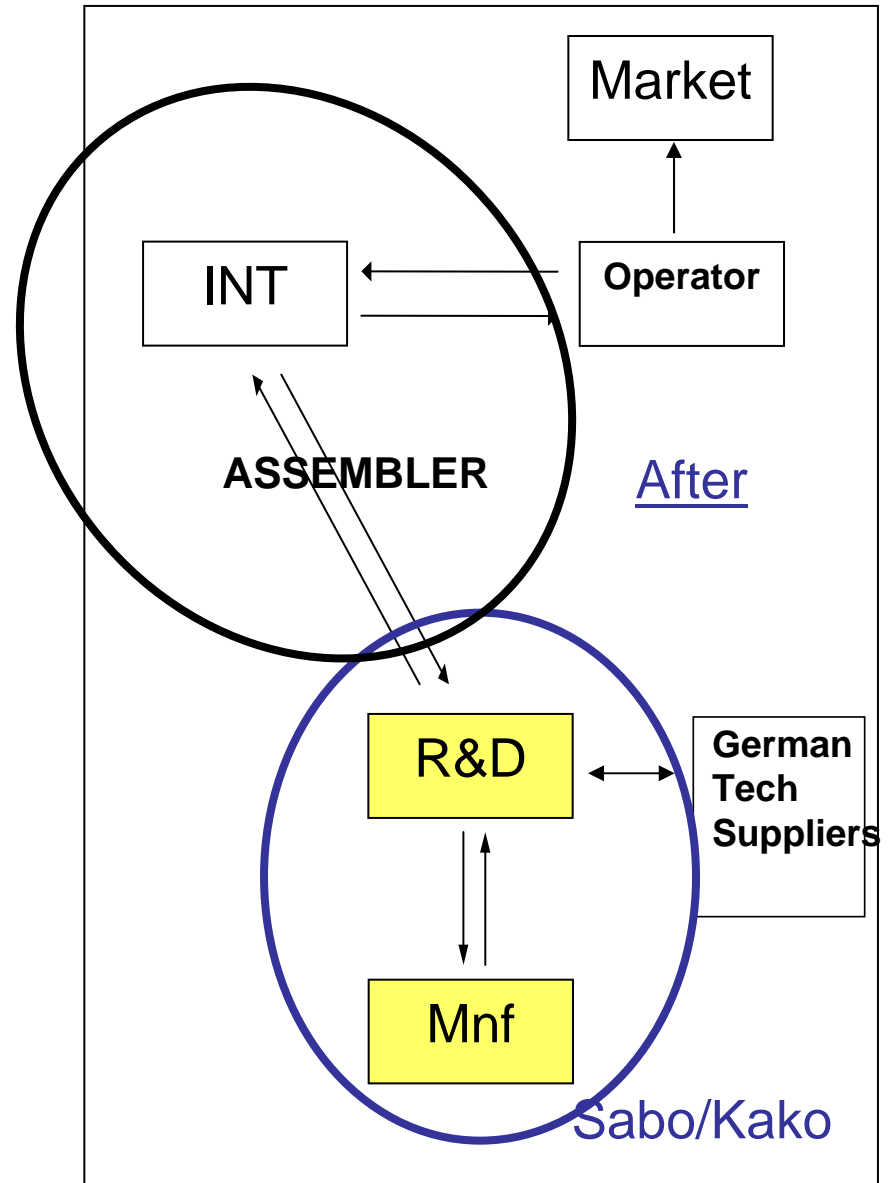
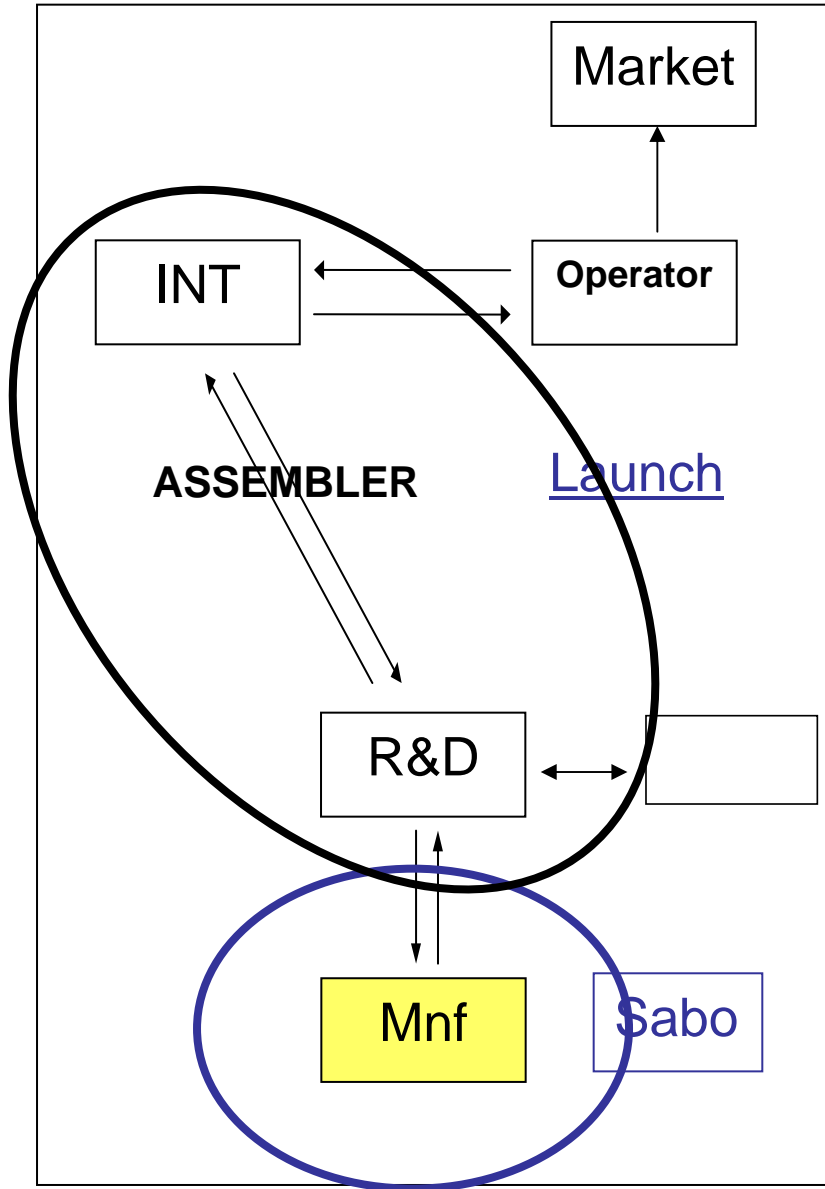
SABO – AUTO PARTS PRODUCER

EMBRAER – AIRCRAFT PRODUCER

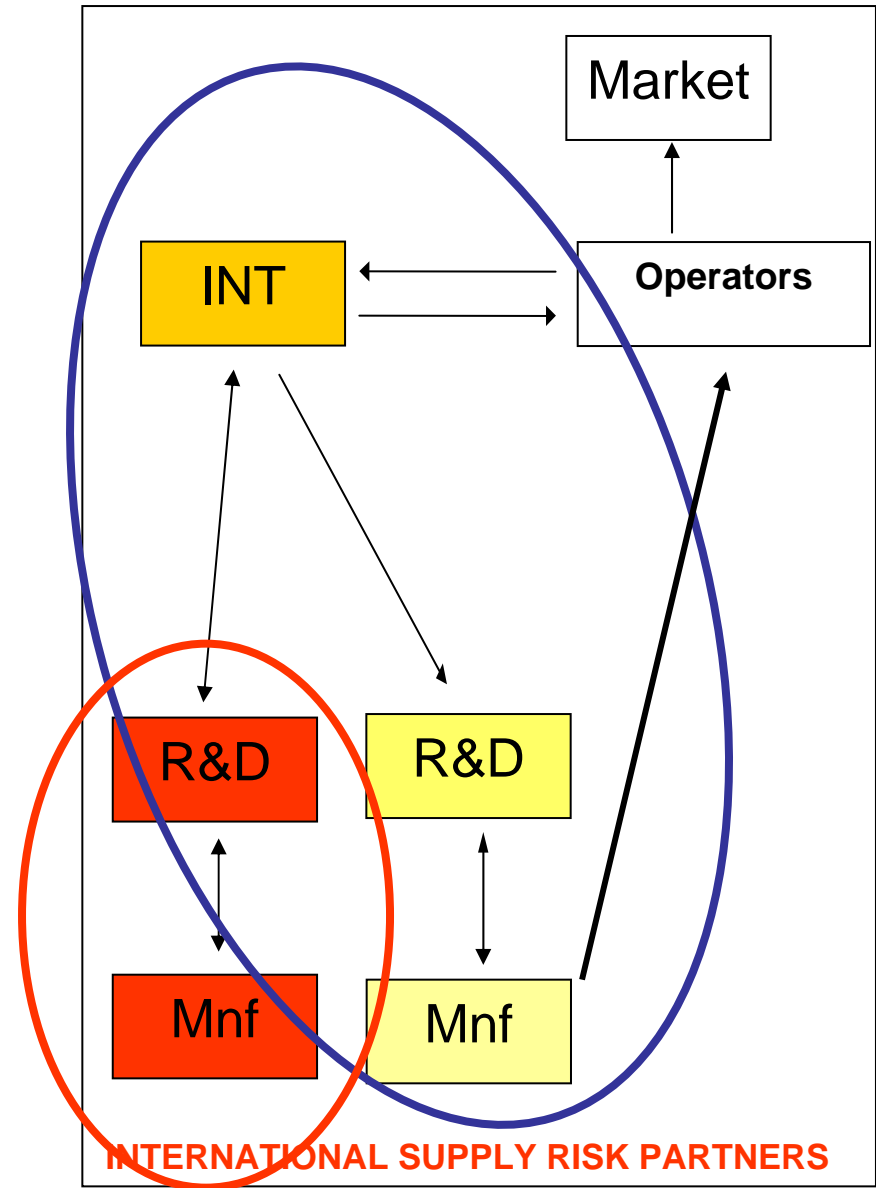
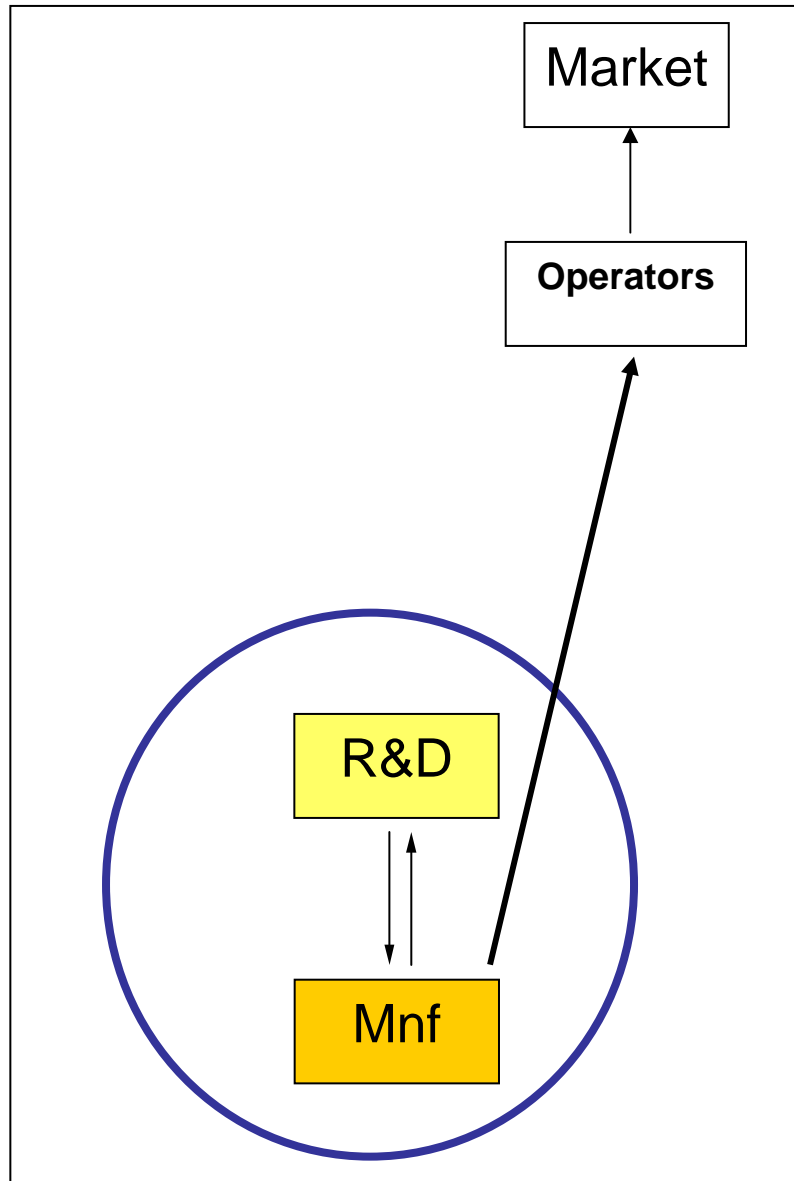
COMMODITIES' PRODUCER

VOTORANTIM – CEMENT PRODUCER

The evolution of Sabo in its internationalisation process



The evolution of Embraer in its internationalisation process



The role of manufacturing in the internationalisation processes of firms from Emerging Economies

Early –
movers

Decide > transfer > adapt

Decide > experiment > learn > transfer

Japan

Learn > catch-up > innovate > transfer (greenfields)

Brazil

Understand GVC > evaluate M&A or greenfield > decide > integrate > support movement of MNE up the value chain

E agora? O que esperar no novo contexto de crise global?

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Maria Tereza Leme Fleury
ORGANIZADORES

INTERNACIONALIZAÇÃO E OS PAÍSES EMERGENTES



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