



Rotman Commerce UNIVERSITY OF TORONTO

Course Outline

RSM490H1S (L5101)

International Strategy

Fall 2018

Course Meets: Monday 6-8pm in Classroom Woodworth College Residence (WO 30)

Instructor:	Jan Klakurka
E-Mail:	jan.klakurka@rotman.utoronto.ca
Webpage:	http://www.portalinfo.utoronto.ca/
Phone:	289-644-4199 (Fongo Voip)
Fax:	416-978-5433
Office Hours:	Monday 4-5pm or by appointment

Course Scope and Mission

This course examines how organizations, their divisions, business units, subsidiaries and partners succeed in reaching their goals through design and implementation of competitive strategies and tactics outside of their original borders. Competitive success in the global marketplace is achieved by leveraging formal strategic processes, application of market selection and entry techniques, incorporation of creativity of people across diverse jurisdictions, and navigation within the context of unique institutional and macroeconomic environments. Beyond simply thinking in terms of global growth, this course will address what can be done for those domestic players that now face enhanced competition from international companies who have set their sights on new markets.

In this course, students will spend each class analyzing the institutional and resource-based constraints that enhance or detract from global competitiveness. This course will hone traditional strategic analysis skills, apply the principles of Integrative Thinking, and approach global business with the role of “futurist” in analyzing each business case studied weekly – where to expand/retract, how to stay true to corporate values, while evolving for new realities, and what global lessons can make the corporation a stronger innovator. Looking at globalizing business development and execution from a multi-dimensional perspective, this course will address the analyses and resulting decisions undertaken to capitalize on opportunities. The source of these international opportunities will be revealed to be an optimization of relationships, strategy, structure, technologies, governance, and funding, seeking an optimal balance of global and local perspective to lead in competitive world today and tomorrow.

Course Prerequisites

Prerequisite: RSM392H1

Required Readings and Materials

Global Business, Fourth Edition. 2017. Michael W. Peng. South-Western Cengage Learning. ISBN-13: 9781305500891; ISBN-10: 1305500891

Each week, a PowerPoint presentation will be delivered to students covering the material required and testable on the non-case portion of the final exam and to be incorporated into case and group reports. The **presentation will not repeat textbook material** that is assumed to be pre-read in detail by all students. The text is also a source of testable material. Following the presentation, class will discuss their **pre-class prepared solutions** to a variety of business cases. Cases include nine from Ivey and four from HBS (see class schedule and order instructions in Appendix A below). Case questions will be made available on Quercus for all cases at the start of term so students have plenty of time and direction to analyze each case. Case learning points will be summarized weekly, as key “take-aways” from the class discussion.

Readings (academic and professional) will encompass key topics and provide enhanced depth of learning.

Global business and strategy models will be discussed as part of these materials. Other materials the instructor wishes to hand-out will be distributed on an as-needed basis.

Evaluation and Grades

Grades are a measure of the performance of a student in individual courses. Each student shall be judged on the basis of how well he or she has command of the course materials.

<u>Assignment</u>	<u>Value</u>	<u>Date</u>
Class Participation	20%	Daily
Case Assignment	20%	Selected from Course Timetable by student
Country Assessment	20%	October 22 nd , 2018
Group Industry Assignment	20%	December 6 th (Thursday), 2018
Final Exam (Take-Home)	20%	<i>Released:</i> Dec. 3 rd , 2018; <i>Due:</i> Date & Time Set by Arts & Science During Exam Period

Please submit all work in .pdf, .doc and/or .ppt to save trees and facilitate use of TTS by instructor. All work should be submitted to the appropriate Quercus Assignment created by your Professor.

Participation: To maximize your participation grades – and overall learning – students should attend all classes to maximize opportunities to speak to their colleagues and concentrate on providing class comments which:

- Move the analysis along and/or take it to a “higher” level
- Provide insight that others may not have seen
- Are relevant to the class discussion
- Leverage prior learnings and other references, of your choice, in the context of the case discussion
- Add clarity to course PowerPoint slides (required reading) in the context of the case
- Challenge colleagues in a professional and logical manner
- Drawn similarities to previous learnings and demonstrates their relation to the current case scenario being discussed

Preparing a Business Case Study: To prepare students for further graduate study in business (e.g. an MBA degree) and/or for the rigour of professional work in strategic consulting or related roles, business cases will be utilized each week to challenge students to link theory with practice. Students will be provided with two source guides (one PPT deck and one DOC file) describing approaches to prepare business cases. These course guides will be available on the course Quercus site prior to the start of classes. Students should refer to these guides prior to the start of term, as they get acquainted with case analysis, and revisit throughout term.

Grade review: The instructor does not discuss grades without a substantive reason. Substantive reasons include errors made during grading. If you would like a re-evaluation of your grade in any component of the course, you should follow the proscribed procedures as set out in the document [Student Guidelines for Requesting Grade Reviews](https://portal.rotmancommerce.utoronto.ca/myAccount/academics/information/Guidelines_for_Grade_Reviews.htm) available on the Rotman Commerce portal (https://portal.rotmancommerce.utoronto.ca/myAccount/academics/information/Guidelines_for_Grade_Reviews.htm).

The instructor is responsible for your grade in RSM490 but not responsible for any administrative decisions that may make use of your grade in RSM490. If you believe that your grade requires review, please follow the procedure above.

Final Take-Home Examination

The final take-home examination will consist of 3-4 short answer/mini-scenario questions and one brand new case, which will test your knowledge of the material that is discussed in class sessions and found in the PowerPoints, readings, and case learnings. The exam will be an equivalent length to a regular, third-year Rotman examination in effort and scope. The final take-home examination will be released by Professor Klakurka on December 3rd, 2018 on Quercus. The process for a take-home examination is governed by the same rules attributable to regular examinations. In this regard, Arts & Science will schedule a three-hour window during the regular December 2018 exam period when the take-home exam is due. I will socialize this date on Quercus once the exam schedule is released in mid-July. While students will receive the exam on December 3rd and may begin working on it, the due date may be any three-hour window derived by Arts & Science, between December 8th and December 21st, 2018. It will be due to be uploaded on Quercus by the close of the three-hour window provided by Arts & Science. *Do not book any travel before December 21st, 2018.*

Requirements and Criteria

Performance in the course will be evaluated using a variety of methods that support the objectives identified above. A combination of exams, individual participation, group presentation, and case summary assignments will be used to evaluate participants on a number of different levels.

The criteria for success, in no particular order, are:

- Comprehension of the material
- Demonstration of an ability to think cross-functionally
- A willingness to participate for the benefit of oneself and fellow participants
- Strong work ethic to “pull your weight” in group assignments

These criteria will be applied to written and verbal work throughout the term.

Participants will be evaluated on the following activities, as listed in the table below:

<i>Activity</i>	<i>Percentage of Grade</i>	<i>Description</i>
Final Take-Home Exam	20%	<p>This exam will be a take-home that can be completed in approximately 3-hours, normal “exam” length, and will contain two parts, as shown below. The examination is governed by Arts & Science. Professor Klakurka will provide the exam and a Quercus “assignment” for which to submit your response. However, the specific window of when the exam is due will be provided by Arts & Science (TBD). Aides allowed: Open-book:</p> <ol style="list-style-type: none"> 1. A medium-length comprehensive case testing all course material <i>and</i> application of summary lessons captured at the end of each session 2. Several (4-5) short answer / mini-scenario questions testing material from the weekly PowerPoint presentations, text, readings and other materials
Participation	20%	<p>Preparation for class case discussion, as demonstrated by;</p> <ul style="list-style-type: none"> • willingness to lead and actively participate class discussions in a professional manner • providing valuable insights and analysis • responding to “cold-calls” • Using Quercus / PowerPoint / Excel spreadsheets to present analyses and findings • Formal, voluntary 5-minute presentation of your Country Analysis (see below) and case analyses will be counted positively toward participation grades
Case Assignment	20%	<p>Individually-prepared case analysis of a case, which will be selected by students from among those done in class. Students can select the case of their choice, as suits their schedule and interest area(s). Case analyses will be handed-in at the beginning of class. The case write-up should be no more than twelve pages (double-spaced, 12-point Arial font) in length, with a maximum of seven exhibits. The student should write the case assignment from the perspective of the main character in the case whose business issue requires a solution or the perspective of a consultant advising on the next steps for the company. The case-writing tools presented in class, in the text, and delivered on Quercus as supplementary readings should be used to “crack the case”. The case assignment should include the following:</p> <ul style="list-style-type: none"> • Identify the main character in the case and their strategic business issue(s) or how to compete internationally • Summarize the key case “question(s)” from the perspective of the main character, asking the question “what needs to be done now, soon,

Country Assessment

20%

- this year, in 3 years, in 10 years to successfully grow in a new market(s)”?
- Major institutional and resource-based opportunities & constraints in the home and new country markets as they affect strategic competitiveness
 - Evaluation of market-specifics in at least one country identified in the case
 - Using the text, course tools, and supplementary tools and information, conduct an analysis of the firm, its current and future geographic scope, competitors, market, products, finances, people, operations, innovativeness, culture, and other business areas, to determine the root causes of the case issue(s) and/or identify potential globalizing factors and their firm impacts
 - Sufficiently analyze and answer all case questions posed (for textbook cases) in an integrative and professional report-style
 - Go beyond the case facts in theorizing what the industry might look like once the geographic “footprint” has expanded, where the internationalization will/may occur, what the firm will be like in 2030 and 2050, and what the organization can do to stay relevant in diverse markets, grow through new global initiative and customers; ask what this company is doing/can do to become sustainable, how create uncontested market space, develop wealth for stakeholders, and enhance profitability/other objective measurements, and how such strategic goals are homogeneous or not across the firm’s global operations
 - Propose a solution(s) to the business problem(s) and/or assessment of the firm international competitiveness, as the case circumstances require. Create a detailed plan of action for the character/company to execute in order to solve their problem, enhance their competitiveness, and “win in the globalized/globalizing marketplace”, including the 5 W’s of how to execute on the plan

A detailed assessment of a country of your choice from the perspective of international business opportunities. The assessment should include assessment of the institutional and factor-based rationale that support your overall perspective on the viability of conducting business in the selected country. The report should look at institutional factors, the macro environment, the micro environment from the perspective of one or more industries, and recent news from the country. A regional, city and/or provincial perspective may also be taken, if deemed applicable. Maximum ten (10) pages, double spaced, exclusive of exhibits. The tools provided on Quercus should be incorporated into the assessment, including models such as Porter’s Diamond and Cluster models, Hofstede’s Cultural Dimensions, and relevant strategy models, among others. To be uploaded to Quercus by October 22nd, 2018, end-of-day.

Group Globalization Industry Assignment	20% (2.5% Proposal, 15% Written Assignment, 2.5% Summary Presentation)	<p>A complete country and firm globalization analysis will be undertaken by five or six (approximate) groups of four-five students, to be completed by August 13th, 2018. Groups will select an industry to study and will work together on their own time and should allocate the work effort evenly to each of the team members. The assignment details are as follows:</p> <p>Objective: To analyze the globalization opportunities for a firm within a selected industry of choice. Groups will select a firm that is of interest to them that may or may not be serving international markets. Through a detailed assessment of the firm, Groups will determine where opportunities for globalization may occur and should provide a critique of any such actual globalization efforts done to date. Groups will select one (or more) countries to focus their proposed globalization effort. The country will be analyzed using the Peng and other related International Business frameworks to assess market attractiveness. A competitive assessment is recommended when describing the global market opportunities. Describe the competitive rationale and need giving rise to internationalization of a [known] firm <i>of your choice</i>, including a detailed and analytical description of one of the main global (country) markets and the international and local competitors that operate within each. Conduct your analysis from the perspective of where the industry has been and grown from (the domestic market), where it is today (either fully globally competitive, expanding into new markets globally, or simply at the cusp of contemplating internationalization. Identify why globalizing is impacting this company and what are its prospects for the future. Answer questions such as:</p> <ul style="list-style-type: none"> • Will this company and industry grow, shrink, become extinct, as a result of the international choices made now? How does it define innovation and how is this driven by international market needs? • How is this industry evolving across the globe? What will it look like in 5 years? In 10 years? Which nations are leading? Which governments are supporting/detracting from these opportunities? • Who or which organizations hold the power in this industry’s value chain? How “global” is the value chain? Is this power evenly distributed among all jurisdictions in which the company operates? • Where is the industry/company on the product life cycle? Are all markets at the same junction? Can the home country approach be used or must it be modified? If modified, to what extent? How might the company leapfrog existing technologies in order to win new markets? • How is value created for shareholders/other stakeholders in this industry? How are stakeholders dispersed around the globe and how does this impact market entry, retraction, repatriation of profits, etc.? • What should be done by the main competitor to stay competitive, to drive growth, to “creatively destruct” itself? What does this mean for incumbents? For Upstarts? • What’s the market size for global opportunities? Which ones are best? Where should global expansion happen first? Later? • What regulatory obstacles need overcoming? How would you
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implement the plan to move into this country? A detailed assessment of the market entry requirements and summary is required.

Tools: Groups should utilize the PowerPoint slides and any standard textbook on strategic management (e.g. Peng) to structure the written assignment and presentation. Students should be prepared to apply the Peng framework introduced in the text, well-known strategic frameworks like “Porter 5 Forces” and other models, as deemed necessary, in depth during this group assignment. Analyses will be enhanced by making use of the tools presented on during class. The structure of the analysis should include customized versions of several of the models described in the class to show applicability of the models to this real-life industry analysis. These tools will be complemented by an effective presentation discussion early in term.

Components of Assignment: Each group will be responsible for submitting several components of the overall assignment as follows:

- *Proposal:* Due October 29th, 2018 and worth 2.5% of group assignment mark. This proposal will be a 4 double-spaced, 12-point Arial font, page Word document that summarizes the analyzes to be undertaken. An accompanying PowerPoint can also be delivered. It will include:
 - Choice of firm to be analyzed and why chosen within the context of globalizing business?
 - Table of contents of final written report
 - Research tools being utilized & description of deliverables
 - Roles of each group team member and questions to be answered by analyses
- *Written Report Part A – Country Analysis:* Due December 6th, 2018 and worth 7.5% of group assignment mark. This portion of the written report will be ~12 double-spaced, 12-point Arial font, pages maximum in Word format. It will describe and analyze the country(ies) of choice being targeted by the firm-of-choice, the focal point of globalization efforts, its comparative advantages, regulatory environment, institutional perspective (from Peng framework), cultural uniqueness, macroeconomic environment and prospects for the future, based on an application of the tools described above. Report to follow proposal Table of Contents.
- *Written Report Part B – Firm & Industry Analysis:* Due December 6th, 2018 and worth 7.5% of group assignment mark. This portion of the written report will be ~12 double-spaced, 12-point Arial font, pages maximum in Word format describing results of an analysis of your chosen firm, its industry (both home and international markets), and why is should globalize now (and/or an evaluation of globalization efforts to date such as why to scale-back global efforts).
- *Appendices and Exhibits:* Due December 6th, 2018 and included in the weight of the Written Report mark. No more than ten pages of appendices and exhibits should be included to illustrate results of the

	<p>analyses undertaken and should include any assumptions made.</p> <ul style="list-style-type: none"> • <i>15-Minute Summary Presentation:</i> Completed by all/some members to the class during the final week of class, worth 2.5% of group assignment mark. Presentation should not exceed fifteen slides and should summarize all aspects of both components of the written report. (NB: To expedite presentations by ~five teams in two hours, all summary presentations are to be e-mailed to Jan Klakurka by 4pm on December 6th, 2018) • <i>Multimedia Component:</i> Groups are strongly encouraged to incorporate a multimedia component in their final report/presentation.
Total	100%

POLICIES AND PROCEDURES

Missed Assignments

Students who miss a test or assignment for reasons entirely beyond their control (e.g. illness) may submit a request for special consideration. Provided that notification and documentation are provided in a timely manner, and that the request is subsequently approved, no academic penalty will be applied.

In such cases, students must notify Rotman Commerce on the date of the missed test (or due date in the case of course work) and submit supporting documentation (e.g. [Verification of Student Illness or Injury form](#)) to the Rotman Commerce Program Office within **48 hours** of the originally scheduled test or due date. Students who do not provide Rotman Commerce or the instructor with appropriate or sufficient supporting documentation will be given a grade of 0 (zero) for the missed test or course deliverable.

Documentation submitted in support of petitions for missing tests and assignments must be original; no faxed or scanned copies will be accepted

Note that the physician's report must establish that the patient was examined and diagnosed at the time of illness, not after the fact. Rotman Commerce will not accept a statement that merely confirms a later report of illness made by the student to a physician.

Course Work & Academic Honesty

Attendance in Class – Physical presence in class and active engagement in daily discussions is expected of all students. Material presented in class may be testable as part of the evaluations noted above.

Each class will follow a three-part agenda focused on increasing understanding of course material, applying course material and analytical tools to the case, and summarizing our key lessons learned, in a list, for later use (on exams, assignments, etc.). The three areas will be addressed according to the following timeline:

- Topical Discussion on the PowerPoint slides (required readings), led by Lecturer with class participation
- Commence Case Discussion

- 5-10 minute break and time to write on-going formal feedback about the class
- Commence Summary Learning Point List Creation
- Class Ends and Office Hours Commence for 1 hour

A variety of techniques will be used to encourage participation, including “cold-calls”, assigning specific sections of the case analyses at the start of class, and “numbering-off” of all participants to request answers.

NOTE: The consistency of your participation comments, knowledge of the previously-delivered material, and quiz/assignment results will be addressed holistically. Students should prepare all weekly cases and assignments individually to maximize their learning and demonstrate the required level of understanding of the material.

Students and lecturer at the end of the class will list summary learning points. These points will be important study notes for future

Respect for fellow students is expected and mandatory (see Standard of Conduct section below) and required to encourage participation by all. Respect will further ensure that all relevant case concepts are raised, therefore increasing the depth of the analysis and discussion. Respect encompasses the following concepts:

- Attend all classes and arrive on time
- Allow and encourage others to participate
- Refrain from “cat-calls” or derogatory comments – if students disagree with an analysis or comment, it is fully expected that counter arguments will be presented in a clear, concise, and professional manner
- Coming to class prepared, including having read the case in detail and having prepared any relevant analysis yourself

The Group Industry Project requires students to work in teams of 4-5.

Learning to work together in teams is an important aspect of your education and preparation for your future careers. That said, project-based teamwork is often new to students and you are therefore reminded of the following expectations with respect to behaviour and contributions to your team project.

1. Read the document entitled, “*Working in Teams: Guidelines for Rotman Commerce Students*” which is available on the RC portal under the Academic Services tab.

2. When working in a team, Rotman Commerce students are expected to:

- Treat other members with courtesy and respect;
- Honour the ground rules established by the team;
- Contribute substantially and proportionally to the final project;
- Ensure enough familiarity with the entire contents of the group project/assignment so as to be able to sign off on it as original work;
- Meet the project timeline as established by the team.

3. Resolving differences:

Conflicts can – and do – occur. Conflicts are part of the team’s process of learning how to work together effectively and can actually generate exciting debate and creative solutions – if managed appropriately.

Student teams are collectively expected to resolve disputes or misunderstandings as soon as they arise (and prior to submission of the final project). In cases where teams are unable to reach a mutually agreeable solution, the entire team must meet with the Rotman Commerce Team Coach** as soon as possible. The Coach will listen to the team and help develop options for improving the team process. All members of the project team must commit to, and, utilize their action plans.

**For an appointment with a Rotman Commerce Team Coach, please contact Nouman Ashraf at nouman.ashraf@rotman.utoronto.ca Nouman is highly skilled at facilitating team dynamics and collaboration. Note that the Team Coach’s role is to provide guidance, support and advice on team matters – not to formally evaluate or assess teamwork for academic purposes.

Active Group Involvement: For the group assignment, groups should allocate the work evenly among each team member. All team members should be familiar with all aspects of the materials developed and presented. A single mark will be awarded to each member of a group. Groups should meet after hours to complete their group assignment, discuss findings, determine applicable textbook and resource guide approaches to use, analyze results, develop the written report and appendices, and rehearse their final group presentation. Groups can determine if each member will speak during the final presentation or if a single spokesperson will present or some derivation thereof. Fifteen percent (15%) of your group project mark (equivalent to 4.5% of overall mark) will be based on results of a peer review survey developed, delivered and interpreted by the Instructor. So, work well together and actively contribute.

Feedback to Instructor

Please send any written or oral feedback to the instructor whenever you feel it is necessary. After session #2, I will ask for your written feedback (just use a blank piece of paper) on any issues you have or things you want to see addressed in the class. This feedback should be confidential, so there is no need to provide your name unless you feel you would like to do so. This type of feedback will then be welcomed at any point during the term. The feedback will be addressed and used to improve the course and your learning experience. During the mid-point of term, a formal feedback survey will be conducted on Zoomerang seeking your feedback on the course to-date with a view to implementing suggestions for improvement for the second part of term.

During the final weeks of term, you are requested to complete the Student Opinion Survey online when made available by the Faculty of Arts & Science.

Submission of Assignments - All assignments are due at the beginning of class on the date specified in the course outline. Submissions must be received on Quercus where students will find specific assignments created. Late submissions of any assignment may be considered; however, a resolution may be determined at the instructor’s discretion and will include an academic penalty of 2%/day off the grade otherwise obtained. Students who, for reasons beyond their control, are unable to submit an assignment by its deadline must obtain approval from the instructor for an extension. Supporting documentation will be required as per the policy on missed tests and assignments.

Standard of Conduct in this Course

Since this course is part of a degree designed to give you a broad understanding of the world of business, we aim to run the course in a way which will be consistent with the world of business - where many of you will spend your working lives. We strive to provide accurate information, quality materials and good service, consistent with our obligations to maintain the high academic standards of the Rotman School of Management.

In return we expect that you will conduct yourself in a way that prepares you for the world of work.

- 1 We start on time, so please do not arrive late and disrupt others.
- 2 Leaving class early is also disruptive to your colleagues and will not be permitted unless you have made prior arrangements with the instructor.
- 3 Turn off your cell phone, pager, and watch alarm.
- 4 Keep up to date. Make sure that you know the class schedule. Check on the course web page for updates and posted materials.
- 5 During the class, respect the learning opportunities of others. Don't distract others by chatting to your neighbour. Our expectation is that you will not only contribute in class to your own learning, but also to that of others.

Accessibility Needs

The University of Toronto is committed to accessibility. If you require accommodations for a disability, or have any accessibility concerns about the course, the classroom or course materials, please contact Accessibility Services as soon as possible:

accessibility.services@utoronto.ca or <http://www.studentlife.utoronto.ca/as>.

Academic Integrity

Academic Integrity is a fundamental value essential to the pursuit of learning and scholarships at the University of Toronto. Participating honestly, respectfully, responsibly, and fairly in this academic community ensures that the UofT degree that you earn will continue to be valued and respected as a true signifier of a student's individual work and academic achievement. As a result, the University treats cases of academic misconduct very seriously.

The University of Toronto's Code of Behaviour on Academic Matters

<http://www.governingcouncil.utoronto.ca/policies/behaveac.htm> outlines the behaviours that constitute academic misconduct, the process for addressing academic offences, and the penalties that may be imposed. You are expected to be familiar with the contents of this document. Potential offences include, but are not limited to:

In papers and assignments:

- Using someone else's ideas or words without appropriate acknowledgement.
- Submitting your own work in more than one course without the permission of the instructor.
- Making up sources or facts.
- Obtaining or providing unauthorized assistance on any assignment (this includes collaborating with others on assignments that are supposed to be completed individually).

On test and exams:

- Using or possessing any unauthorized aid, including a cell phone.
- Looking at someone else's answers
- Misrepresenting your identity.
- Submitting an altered test for re-grading.

Misrepresentation:

- Falsifying institutional documents or grades.
- Falsifying or altering any documentation required by the University, including (but not limited to), medical notes.

All suspected cases of academic dishonesty will be investigated by the following procedures outlined in the *Code of Behaviour on Academic Matters*. If you have any question about what is or not is permitted in the course, please do not hesitate to contact the course instructor. If you have any questions about appropriate research and citation methods, you are expected to seek out additional information from the instructor or other UofT resources such as College Writing Centres or the Academic Success Centre.

Email

At times, the course instructor may decide to communicate important course information by email. As such, all UofT students are required to have a valid UTmail+ email address. You are responsible for ensuring that your UTmail+ email address is set up AND properly entered on the ROSI system. For more information please visit <http://help.ic.utoronto.ca/category/3/utmail.html>

Forwarding your utoronto.ca email to a Hotmail, Gmail, Yahoo or other type of email account is not advisable. In some cases, messages from utoronto.ca addresses sent to Hotmail, Gmail or Yahoo accounts are filtered as junk mail, which means that important messages from your course instructor may end up in your spam or junk mail folder.

Quercus and the Course Page

The online course page for this course is accessed through Quercus. To access the course page, go to the UofT Portal login at <https://portal.utoronto.ca/> and log in using your UTORid and password. Once you have logged in, look for the My Courses module where you'll find the link to all your course websites. If you don't see the course listed here but you are properly registered for the course in ROSI, wait 48 hours. If the course does not appear, go to the Information Commons Help Desk in Robarts Library, 1st floor, for help, or explore the Portal Information and Help at www.portalinfo.utoronto.ca/students and review the Frequently Asked Questions.

Recording Lectures

Lectures and course materials prepared by the instructor are considered by the University to be an instructor's intellectual property covered by the Canadian Copyright Act. Students wishing to record a lecture or other course material in any way are required to ask the instructor's explicit permission, and may not do so unless permission is granted (note: students who have been previously granted permission to record lectures as an accommodation for a disability are, of course, excepted). This includes tape recording, filming, photographing PowerPoint slides, Quercus materials, etc.

If permission is granted by the instructor (or via Accessibility Services), it is intended for the individual student's own study purposes and does not include permission to "publish" them in

anyway. It is absolutely forbidden for a student to publish an instructor's notes to a website or sell them in any other form without formal permission.

RSM490H1F (L5101) Course Schedule and Related Items

Supplementary Readings: If additional required and/or supplementary readings are assigned for any week, they will be uploaded to Quercus and should be prepared before class to allow participation in the in-class discussion.

Responsibility for Doing Textbook Readings: Students are responsible for reading and making personal notes on the textbook learnings. Instructor will not explicitly review textbook material, but will answer any questions about material covered. Textbook key concepts will be highlighted in the PPT decks each week and augmented with readings, case insight(s), and practical anecdotes. POWERPOINT PRESENTATIONS WILL GO "BEYOND" THE TEXT, COVERING CURRENT ISSUES/NEWS, COUNTRY ANALYSES USING ECONOMIST INTELLIGENCE UNIT AND OTHER RESOURCES/WEBSITES, AND PERSONAL EXPERIENCES OF PROFESSOR.

Case & Reading Questions: Questions to assist in your comprehension of issue(s) in the case studies and theory in the readings are located in the *Course Materials* section of the course Quercus site. Students should always assume the high-level requirement is to "Prepare the Case". However, for students with limited case preparation experience, the questions should help to frame case issue(s) and be useful in development of solutions.

For case assignment reports for submission, students should ensure they "tell the story" that is required to provide a complete solution to case issue(s).

This term, there are recent cases, Uniqulo (session 11) and Carrefour (week 12). There is also an exercise in week 2 to contextualize our global perspective. There are also three required readings (two academic and one professional) to complement the Peng textbook and supplementary readings available on Quercus. I encourage students to utilize the extensive Peng chapter bibliographies for further personal reading on International Strategy & Business topics.

NB: It is likely that the September 17th session will include a guest lecturer (TBD). This will be confirmed and announced in class.

Session	Date	Topics and Country Focus	Chapters, Readings & Case
1	Sept 10, 2018	<ul style="list-style-type: none"> Course Overview and Introductions Introduction to Globalization of Business Introduction to Case Analysis CHINA 	<ul style="list-style-type: none"> Text: Ch. 1 Case: Xiaomi: Entering International Markets (Ivey, 9B17M045)
2	Sept 17, 2018	<ul style="list-style-type: none"> The Institutions of Global Business Political Economy Cultural Norms SAUDI ARABIA 	<ul style="list-style-type: none"> Text: Ch. 2-3 Exercise: Where Have You Been? (Ivey, 9B16M140) Case: Medical Equipment in Saudi Arabia (Ivey, 9B07C042)

3	Sept 24, 2018	<ul style="list-style-type: none"> Trading Internationally Applying strategic models to a global setting UKRAINE 	<ul style="list-style-type: none"> Text: Ch. 4-5 Case: Managing a Severe Crisis: PharmaCorp in Ukraine (Ivey, 9B17M085) Reading: Egelhoff, William G. 2010. "How the Parent Headquarters Adds Value to an MNC". Management International Review. 50: 413- 431. University of Toronto Library, eJournals.
4	Oct 1, 2018	<ul style="list-style-type: none"> Macroeconomic and Non-Governmental Agencies (NGO's) Business-Gov't Relations Foreign Direct Investment Guest Lecturer: David Beatty, Managing Director, Industrial Alliance Securities BRAZIL 	<ul style="list-style-type: none"> Text: Ch. 6-7 Case: Brazil: Leading the BRICS? (HBS, 711024)
	Oct 8, 2018	<ul style="list-style-type: none"> Thanksgiving Monday 	<ul style="list-style-type: none"> NO CLASSES HELD
5	Oct 15, 2018	<ul style="list-style-type: none"> International Competitiveness through Clustering Integration Through Multilateral Organizational NETHERLANDS / KENYA 	<ul style="list-style-type: none"> Text: Ch. 8 Case: The Dutch Flower Cluster (HBS, 711507)
6	Oct 22, 2018	<ul style="list-style-type: none"> From Entrepreneur to International Firm Country Assessment Due AUSTRIA 	<ul style="list-style-type: none"> Text: Ch. 9 Case: Zotter - Living by Chocolate (HBS, 810091)
7	Oct 29, 2018	<ul style="list-style-type: none"> Entering Foreign Markets Facing Global Competition Group Assignment Proposal Due LEBANON 	<ul style="list-style-type: none"> Text: Ch. 10-11 Case: Chabros International Group: A World of Wood (Ivey, 9B10M100) Reading: Impacts of institutional pressures and the strength of market supporting institutions in the host country on the ownership strategy of multinational enterprises: theoretical discussion and propositions, Ahmad Arslan, Journal of Management & Governance, February 2012, Volume, 16(Issue1)Page, p.107-124
	Nov 5, 2018	<ul style="list-style-type: none"> Fall Reading Week 	<ul style="list-style-type: none"> NO CLASSES HELD
8	Nov 12, 2018	<ul style="list-style-type: none"> JV's & Alliance Strategies International M&A Global Leadership INDIA 	<ul style="list-style-type: none"> Text: Ch. 12-13 Case: Eli Lilly in India: Rethinking the Joint Venture Strategy (Ivey, 9B04M016) Reading: Developing global leaders. By: Ghemawat, Pankaj, McKinsey Quarterly, 00475394, 2012, Issue 3
9	Nov 19, 2018	<ul style="list-style-type: none"> Global Functional Strategies Outsourcing Strategy RUSSIA, ESTONIA, FINLAND & SWEDEN 	<ul style="list-style-type: none"> Text: Ch. 14 Case: Tallink: Connecting Estonia to Finland, Sweden and Russia (Ivey,

			9B05E016)
10	Nov 26, 2018	<ul style="list-style-type: none"> • Global Good Governance • Foresight • QATAR & KUWAIT 	<ul style="list-style-type: none"> • Text: Ch. 15 • Case: Corporate Governance Standards: Qatar Telecom Acquires Wataniya Telecom (Ivey, 9B09M048)
11	Dec 3, 2018	<ul style="list-style-type: none"> • Re-thinking Globalization • Expatriates • USA 	<ul style="list-style-type: none"> • Text: Ch. 16 • Case: Uniqulo: Re-Examining American Expansion (Ivey, 9B18M067)
12	Dec 6, 2018 (Thursday)	<ul style="list-style-type: none"> • Social Responsibility in the International Context • Group Assignment Due & Final Presentations • CHINA Redux 	<ul style="list-style-type: none"> • Text: Ch. 17 • Case: Carrefour China: Building a Greener Store (Ivey, 9B08M048) • Group Presentations (x 6)
Final Exam	TBD	<ul style="list-style-type: none"> • Final Examination 	<ul style="list-style-type: none"> • All course PowerPoint material will be testable on the final exam

Your Lecturer

Jan Klakurka is Director and tenure-track Assistant Professor in Management and Organizational Studies at Huron University College, Western University and long-standing Instructor within the strategy department at the Rotman School of Management, University of Toronto. Jan's professional designations include: C. Dir., CPA, CA, APF and CMC, the latter where Jan was past Canadian Association of Management Consultant's Gold Medalist for Canada. He is a graduate of University of Toronto (B.Comm), the Richard Ivey School of Business (MBA), and Director's College, McMaster University. Jan's professional background spans nineteen years in industry and professional services, and six more in academia. Prior to the Academy, Jan was Director, Corporate Planning & Business Development, leading and delivering strategy for a mid-tier firm. He has led finance as corporate controller and streamlined operations as Director, Process Improvement, advised C-suite leaders a senior strategy consulting manager, and worked in Canadian treasury operations. With experience across multiple industries, Jan has served organizations across private and public sectors and now teaches senior year courses in strategy, international business, advanced taxation, among others. Jan's research is directed toward the intersection of strategic planning, lucid foresight and governance, with recent keynotes covering consulting academics and conference presentations in global management. As such, Jan is a designated (APF) member of the Association of Professional Futurists.

Jan has taught *Strategic Management* at University of Toronto since 2005 (UTM: 2005-2009, Rotman: 2012-2018), Huron (2014-2018), and Laurier (2013-2015). Jan's other core teaching courses are *International Business* (2012-2018, including MBA in 2014) and *Management Consulting* at Rotman School of Management (2011-2019) He also regularly teaches *Introduction to Management* at Rotman Commerce (2011-2018). In 2014, he began teaching a Summer Abroad course for Rotman/UofT at Masaryk University In Brno, Czech Republic called *Strategy in the European Context* that is going into its six year. He has also taught the general management Ivey LEADER (Leading Education in Emerging Regions) program in Dnepropetrovsk, Ukraine and Minsk, Belarus, has spoken on strategic foresight at University of Toronto, leadership, consulting, and finance at Brock University and the Ivey Business School,

taught on the topic of wines at the Independent Wine Education Guild, and has developed and delivered training programs to Deloitte Consulting staff on a range of topics.

A graduate of UTM's Commerce program, Jan went on to complete several designations – CPA, CA, C.Dir., APF and CMC, the latter where he was Gold Medalist for the Canadian Association of Management Consultants (2003). His favourite business book is still Competing for the Future, by Hamel and Prahalad, and he enjoys skiing, golf, scuba-diving, white-water kayaking, and strategic investments. His greatest project is having fun with his two daughters who are twelve and ten years-old. In 2006, he was awarded the AIWS designation, joining 3,500 others worldwide that have completed the Diploma in Wines & Spirits (Dipl.WSET) from the Wine & Spirit Education Trust based in London (U.K.) and is currently on the long road in pursuit of the Master of Wine designation. In 2014, Jan received his Chartered Director's designation offered by the Director's College, Degroote School of Business, McMaster University. Jan serves as Board member and CFO of Corporations for Community Connections, a private foundation of Siemens, and on the finance committee of the Mansfield Ski Club.

**APPENDIX A: Instructions for Accessing Course Material for International Strategy
(RSM490H1S SECTION L5101 Fall 2018)**



Richard Ivey School of Business
The University of Western Ontario

Ivey
Publishing

This message explains how to purchase materials needed for your course.

Course: International Strategy

Professor(s): Jan Klakurka

Starting: Sept 3, 2018

Ending: Dec 31, 2018

- 1 Go to the Ivey Publishing website at www.iveycases.com
- 2 [Log in](#) to your existing account or click "[Register](#)" to create a new account and follow the prompts to complete the registration. If registering, choose the "Student User" role. Click on this link or copy into your browser:
<https://www.iveycases.com/CoursepackView.aspx?id=19808>
- 3 Click "Add to Cart".
- 4 You may choose to order in either **print** or **digital** format.
 - To order the material in digital format, check "digital download" and click "OK".
 - To order a printed copy for delivery, enter the print quantity required and click "OK". Please note that shipping charges will apply.
- 5 Go to the Shopping Cart (located at the top of the page), click "Checkout", and complete the checkout process.
- 6 When payment has been processed successfully, an Order Confirmation will be emailed to you immediately and you will see the Order Confirmation screen.
 - If you ordered digital copies: Click "Download your Digital Items" or go to "My Orders" to access the file.
 - If you ordered printed copies: Your order will be printed and shipped within 2 to 3 business days.

IMPORTANT: Access to downloadable files will expire 30 days from the order date, so be sure to save a copy on your computer. The downloadable file is a PDF document that can be opened using Adobe Reader.

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Ivey Publishing
Ivey Business School
Western University
e. cases@ivey.ca
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Business Hours:
Monday to Thursday: 8:00am-4:30pm (ET)
Friday: 8:00am-4:00pm (ET)