



# Rotman Commerce UNIVERSITY OF TORONTO

## Course Outline

### **RSM490H1S International Strategy**

Summer 2021

Course Meets: Monday & Wednesday 7-9pm, Synchronously via BB Collaborate (link on Quercus site)

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## 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 Technology

For Summer 2021, this course will be conducted entirely online. To participate fully and to complete the course successfully, you must ensure you have a computer with a working webcam, microphone and reliable access to an internet connection. If you don't have this technology, or cannot be assured that you will have it for the duration of the course and all its tests/presentations/deliverables, please do not remain in the course. There will be other opportunities in other terms to take this course without the necessity to rely on technology.

## Required Readings and Materials

**International Business**, Second Edition. 2020. Morris and Oldroyd. Wiley.  
ISBN-13: 978-1-119-67974-5

Available in UofT Bookstore or at: <https://www.wiley.com/en-ca/International+Business,+2nd+Edition-p-9781119679745>

Each week, a PowerPoint presentation will be delivered to students covering the material required and testable on the non-case portion of the final take-home term test 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, but 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 "take-aways" from class discussion.

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

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

## 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 (based on quantity & quality combined)
Country Assessment	20%	August 4 <sup>th</sup> , 2021 @ 11:59pm
Impact of Covid Reflection	20%	July 21 <sup>st</sup> , 2021 @ 11:59pm
Future of Global Business	20%	August 16 <sup>th</sup> / 12 <sup>th</sup> , 2021 (in class)
Final Case Take-Home Term Test	20%	<i>Released:</i> Aug. 11 <sup>th</sup> , '21; <i>Due:</i> Aug. 25 <sup>th</sup> , '21

Please submit all work in .doc, .xls and/or .ppt (not .pdf) to save trees and facilitate use of TTS by instructor. All work *must* be submitted to the appropriate Quercus Assignment created by your Professor. All work submitted will be examined by Turnitin.com for plagiarism review.

**Class Contribution & Participation:** To maximize your participation grades – and overall learning – students should attend all synchronous 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
- Draw similarities to previous learnings and demonstrates their relation to the current case scenario being discussed

Missing class without a valid reason is worth zero participation for that day. Likewise, simply attending class and not speaking or engaging with the discussion is not worth any participation marks. The Professor will utilize various engagement techniques to give students the chance to participate, but this is only helpful when students have **read and analyzed cases and other materials thoroughly in advance of class**. Where students cannot participate due to bandwidth or time zone issues, these should be clearly communicated to the professor at the start of term. Alternative arrangements will then be arranged on an individual basis.

For those unable to attend all the synchronous online sessions, they can elect to do a number of Behavioural Research (BEAR) Lab studies to make up for part of your participation grade, equal to 4% of the overall grade (out of 20% participation). Studies would occur online via the SONA system. This can be done through BEAR studies with a value of 1.0 or 0.5. Hence, students should realize that they will need to do many studies to make up the participation grade so should look to attend class during scheduled times. As an alternative, students can summarize academic research papers in the strategy discipline. These summaries should be 4-5 pages in length for an average 20-30 page academic paper. Each summary will be marked at the time of final participation grading by Professor Klakurka. Each will have a maximum value of 5% to be counted toward participation. These are not “automatic 5%” reports. They are NOT “bonus marks”. They are only available to students that cannot participate because of connectivity/time zone issues.

**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](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.

There is no provision for deferred term tests in Summer 2021.

## Final Take-Home Term Test

The final take-home term test will consist one brand new case that will test your knowledge of the global strategy and international business material that is discussed in class sessions and found in the PowerPoints, readings, and case learnings. An example of the format will be provided on Quercus. The term test will be an equivalent length to a regular, fourth-year Rotman term test in effort and scope (e.g. designed to take approximately 3 hours). The final take-home term test will be released by Professor Klakurka on August 11<sup>th</sup>, 2021 on Quercus. The process for a take-home term test is governed by the same rules attributable to regular final examinations, so no additional inquiries will be fielded once released. While students will receive the term test on April 11<sup>th</sup> and may begin working on it, the due date will be August 25<sup>th</sup>, 2021 at 11:59pm. Given the two week window to complete, no extensions will be granted for submission. It will be due to be uploaded on Quercus by end-of-day (11:59pm) in the appropriate Assignment created by your Professor.

## Requirements and Criteria

Performance in the course will be evaluated using a variety of methods that support the objectives identified above. A combination of term tests, 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 and globally
- 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>
<b>Final Home Test</b>	<b>Take-Term</b>	20%	<p>This term test will be a take-home that can be completed in approximately 3-hours, normal “term test” length. The term test is governed by the same general rules of the Faculty of Arts &amp; Science. Professor Klakurka will provide the term test and a Quercus “assignment” for which to submit your response. Aides allowed: Open-book:</p> <ol style="list-style-type: none"> <li>1. A medium-length comprehensive case (new, not from coursepack) testing all course material <i>and</i> application of summary lessons captured at the end of each session</li> </ol> <p>The term test submission will be in the form of an individually-prepared case analysis of a case, which will be selected by students from among those done in class. Several examples of case reports will be shown in class and made available on Quercus, as the class completes cases during term. The case write-up should be approximately twelve pages (double-spaced, 12-point Arial font) in length, excluding 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"> <li>• Identify the main character in the case and their strategic business issue(s) or how to compete internationally</li> <li>• Summarize the key case “question(s)” from the perspective of the main character, asking the question “what needs to be done now, soon, this year, in 3 years, in 10 years to successfully grow in a new market(s)”?</li> <li>• Major institutional and resource-based opportunities &amp; constraints in the home and new country markets as they affect strategic competitiveness</li> <li>• Evaluation of market-specifics in at least one country identified in the case</li> <li>• 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</li> <li>• Sufficiently analyze and answer all case questions posed (for textbook cases) in an integrative and professional report-style</li> <li>• 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</li> </ul>

		<p>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</p> <p>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</p>
<b>Participation</b>	20%	<p>Preparation for class case discussion, as demonstrated by;</p> <ul style="list-style-type: none"> <li>• willingness to lead and actively participate class discussions in a professional manner</li> <li>• providing valuable insights and analysis</li> <li>• responding to "cold-calls"</li> <li>• Using Quercus / PowerPoint / Excel spreadsheets to present analyses and findings</li> </ul>
<b>Country Assessment</b>	20%	<p>A detailed assessment of a country of your choice from the prospective 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. Additional details will be posted on the Assignment within Quercus. Maximum twelve (12) pages, double-spaced, exclusive of exhibits. The tools provided on Quercus should be incorporated into the assessment. More information and examples will be provided on Quercus. To be uploaded to Quercus by August 4<sup>th</sup>, end-of-day (11:59pm).</p>
<b>Impact of Covid Reflexive Assessment</b>	20%	<p>Students should prepare a 7-8 page (double-spaced) reflective paper on the impact of covid on global business. Students may explore any areas meaningful to them in relation to the context of global strategy, organizations, governance, supply chains, research, among others. Students should reflect on the role of the institutional view of the firm in the context of their paper. More information and examples will be provided on Quercus. To be uploaded to Quercus by July 21<sup>st</sup>, end-of-day (11:59pm).</p>
<b>Group Global Strategic Plan Assignment</b>	20%	<p>Undertaken by groups of 3-4 students, a complete country and firm-specific global strategy assessment will be developed to analyze global business opportunity(ies) for a particular company/organization. Groups may select a specific industry or vertical for a multi-national enterprise to study, may create an hypothetical start-up/entrepreneurial organization, and/or may investigate other forms of organization globally such as co-ops, foundations, or public-private partnerships. Groups will work together on their own time and teams should allocate the work effort evenly to each of the team members. The assignment details are as follows:</p>

**Objective: To analyze the globalization opportunities for a firm within a selected industry of choice in this new environment.**

Select a firm that is of interest that may or may not be serving international markets.

Through a detailed assessment of the firm, determine where opportunities for globalization may occur and provide a critique of any such actual globalization efforts done to date. Given recent events, assess the institutional changes before and after covid, and discuss the ensuing challenges involved.

Select one (or more) countries to focus their proposed globalization effort. The country will be analyzed using the Morris & Oldroyd 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 *of your choice*, 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:

- Will this company and industry grow, shrink, become extinct, as a result of the international choices made now? What is disrupting this market? How does it define innovation and how is this driven by international market needs?
- What are the global sustainability and shared value goals of this organization? What are the ways this organization fits into a newly-evolving global context.
- How is this industry evolving across the globe? What will it look like in 5 years? In 20 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 implement the plan to move into (exit, if your assignment focuses on divestiture) this country? A detailed assessment of the market entry (exit) requirements and summary is required.

**Tools:** Utilize the PowerPoint slides and any standard textbook on strategic management (e.g. Morris/Oldroyd, Peng, etc.) to structure the written assignment and presentation. Students should be prepared to apply the Peng Institutional framework introduced in class, 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. The report should include detailed assessment of the institutional rules governing the strategic direction presented. These tools will be complemented by an effective presentation discussion early in term.

**Components of Assignment:** The assignment consists of two components, a written report and a 12 minute webinar pitch during the synchronous class on the due date: August 16<sup>th</sup>, 2021.

The written report may be a more detailed version of the PPT deck used for the webinar or it may be a Word document report. The page limit is maximum 40 [detailed] slides (if PPT) or 25 pages double-spaced, 12-point Arial font, pages maximum in Word format. It is due to be uploaded to Quercus by August 16<sup>th</sup>, 2021, end-of-day (11:59pm).

The webinar pitch and report will describe and analyze the following non-exhaustive list of components;

- Country(ies) of choice being targeted by the selected firm
- Focal point(s) of globalization efforts
- Comparative advantages
- Regulatory environment
- Institutional perspectives (from Peng framework)
- Cultural uniqueness
- Macroeconomic environment
- Microeconomic impacts
- Impact of covid
- Prospects for the future
- +++



Based on an application of the tools described above, groups should also describe results of an analysis of your chosen firm, its industry(ies) within the scope of your analysis (both home and international markets), and why it should globalize now (and/or an evaluation of globalization efforts to date such as why to scale-back global efforts). NB: For multi-industry organizations, you may elect to analyze only a subset of the industries in which your target company competes.

*Webinar Pitch:* Assuming you are presenting to the CEO/head of strategy at your selected organization, provide a compelling story and business case supporting your recommendations. Completed by all/some members to the class during the final class. Presentations should not exceed fifteen (15) slides and should summarize all aspects of the written report. (NB: To expedite presentations by ~8-10 teams in two hours, all summary presentations are to be e-mailed to Jan Klakurka 2 hours prior to class To be uploaded to Quercus by August 16<sup>th</sup>, 2021.

<b>Total</b>	<b>100%</b>
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## Course Format and Expectations

### Diversity, inclusion and equity

The University of Toronto is committed to equity, human rights and respect for diversity. All members of the learning environment in this course should strive to create an atmosphere of mutual respect where all members of our community can express themselves, engage with each other, and respect one another's differences. U of T does not condone discrimination or harassment against any persons or communities.

### Missed Assignments

Students who miss a test or assignment for reasons entirely beyond their control (e.g. illness) may request special consideration.

In such cases, students must:

1. Notify the instructor AND the Rotman Commerce Program Office **on the date** of the missed course deliverable, e.g. missed test, final assessments, assignment or class (in the case of participation marks).
2. Complete a [Request for Special Consideration Form](#) and submit it along with supporting documentation this may include either your Absence Declaration on [ACORN](#) (please read the instructions on how to use the Absence Declaration in ACORN) or [Verification of Student Illness or Injury form](#) to the Rotman Commerce Office within **2 business days** of the originally scheduled course deliverable.

Students who do not provide appropriate or sufficient supporting documentation will be given a grade of 0 (zero) for the missed course deliverable.

**Note that documentation must clearly establish that you were ill or had other circumstances that prevented you from attending on the date in question. After-the-fact reports are not sufficient.**

## 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 term tests, 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

Office hours commence one hour prior to the Monday night class for all sections.

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 3-5 maximum.

NB: This is NOT a marketing project. This is a strategy course such that group reports that focus solely on marketing will not be awarded highly. Reports must focus on the whole system, complexity, contextualization, and market alternatives. Groups are formed by the TA and will be similarly created in Quercus. Students may request, through e-mail, to work in a group with a particular classmate(s) from their same section.

Working as a team is challenging; this is true both in the real world and in your academic classes. However, learning to work together in teams is an important aspect of your education and preparation for your future careers. You are encouraged to review the teamwork resources available to all Rotman Commerce students at <https://rotmancommerce.utoronto.ca/teamwork-resources> while navigating these challenges, but keep in mind that supports are also available for when you think you may need extra help.

New in the 2020-2021 academic year, the Rotman Commerce Centre for Professional Skills (RC-CPS) will offer appointments with Teamwork Mentors for any teams encountering challenges in their teamwork. Some possible reasons you might book an appointment with a Teamwork Mentor include:

- Team members have identified constraints on their time, work or accommodations they require that conflict with necessary timelines for the team.
- Teams are unsure how to divide their workload for a team project.
- Teams are concerned about how to integrate the individual contributions of each member and how to ensure team members are contributing equally.
- Teams are concerned about how to ensure all group members are aware of academic integrity guidelines (e.g. properly attributing sources) and follow them.
- Teams would like to be able to communicate more effectively with each other, particularly when navigating a remote work academic environment.

To book a meeting with a Teamwork Mentor, send an email to [rotmancommerce.teamworkhelp@utoronto.ca](mailto:rotmancommerce.teamworkhelp@utoronto.ca) with the course code (e.g. RSM100) and team number (if available) in the subject line of the email. Any member of the team may reach out individually to book an appointment, but we also encourage teams to book their appointments as a team. You will normally receive a response within 24-36 hours, but note that during busy times of the semester the waiting period may be longer. Be proactive in booking your meeting, and do so **as soon as** challenges arise!

If you are a student registered with Accessibility Services, and extensions are one of your academic accommodations, you should consult with your Accessibility Advisor about this course. For considerations pertaining to teamwork and accessibility, please see information in the section on Accessibility Needs below under the Policies and Procedures heading.

**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. Twenty-five percent (25%) of your group project mark (equivalent to 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 on any issues you have or things you want to see addressed in the class. This feedback can 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 offered to the class 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 temporary or ongoing disability or health concern, or have any accessibility concerns about the course, the classroom or course materials, please contact Accessibility Services as soon as possible at [accessibility.services@utoronto.ca](mailto:accessibility.services@utoronto.ca) or [studentlife.utoronto.ca/as](http://studentlife.utoronto.ca/as). It is important that

you get in touch with them as soon as possible because the process for obtaining your accommodation letter may take up to several weeks. If you have general questions or concerns about the accessibility of this course, you are encouraged to reach out to your instructor, course coordinator, or Accessibility Services.

If you're interested in helping make this course more accessible, consider volunteering to be a note taker. Accessibility Services needs dependable volunteer note takers to assist students living with a disability to achieve academic success. All you have to do is attend classes regularly and submit your notes consistently. Follow these steps:

1. Register online as a **Volunteer Note Taker** at <https://clockwork.studentlife.utoronto.ca/custom/misc/home.aspx>
2. Follow the link that says "Volunteer Notetakers"
3. Select your course and upload a sample of your notes
4. Once you have been selected as a note taker, you'll get an email notifying you to upload your notes.

If you have questions or require assistance, please email [as.notetaking@utoronto.ca](mailto:as.notetaking@utoronto.ca). Volunteers may receive co-curricular credit or a certificate of appreciation.

For courses with deliverables that require you to work in teams, please note the following. If you are a student registered with Accessibility Services, and extensions are one of your academic accommodations, requests for extensions impact everyone in the group. As a result, requests for late submissions of any component of teamwork will require compelling reasons, advance notice, and must work for everyone in the team. You are encouraged to discuss with your course instructor, Accessibility Advisor, and other team members what you need in order to successfully complete your coursework. Additionally, the Rotman Commerce Centre for Professional Skills offers Teamwork Mentors (see section above) who can help you and your team discuss how to support you effectively and how to develop a work plan that meets the needs and constraints of all team members.

## 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 term tests:

- 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.

### **Turnitin.com**

Normally students will be required to submit their course essays to Turnitin.com for a review of textual similarity and detection of possible plagiarism. In doing so, students will allow their essays to be included as source documents in the Turnitin.com reference database, where they will be used solely for the purpose of detecting plagiarism. The terms that apply to the university's use of the Turnitin.com service are described on the Turnitin.com website.

## 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://q.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](http://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.

### **Electronic Course Materials**

This course will be using the following electronic course materials:

See Schedule below and Appendix A for ordering instructions.

These materials will cost a total of \$56.85 (digital download) or \$70.08 (printed by Ivey Publishing, excluding shipping). The use of these materials complies with all University of Toronto policies which govern fees for course materials.

### **Credit / No-Credit Option in Rotman Commerce**

You may request to Credit/No-Credit an RSM course in the following cases only:

- The course will not be used for any specialist or focus, including the 8.0 RSM FCE requirement.
- The course does not have a group work component.

If you wish to request credit/no-credit for an RSM course, you must contact a Rotman Commerce academic advisor by the drop deadline for the current term. The deadline for this term is August 16, 2021.

Final approval is on a case-by-case basis with the permission of the Director, Rotman Commerce.

## FIPPA Language

### **Notice of audio recording and sharing (Download and re-use prohibited)**

This course, including your participation, will be recorded on audio and will be available for a short time to students in the course for viewing remotely through BB Collaborate and after each session.

Course audios and materials belong to your instructor, the University, and/or other sources depending on the specific facts of each situation, and are protected by copyright. Do not download, copy, or share any course or student materials or audios/videos without the explicit permission of the instructor.

For questions about recording and use of videos in which you appear please contact your instructor.

## RSM490H1S (All Sections) 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).

There is also an updated exercise in week 2 to contextualize our global perspective. There are also three required readings (two academic and one professional) to complement the Morris & Oldroyd textbook and supplementary readings available on Quercus. I encourage students to utilize the extensive Morris & Oldroyd chapter bibliographies for further personal reading on International Strategy & Business topics.

Session	Date	Topics and Country Focus	Chapters, Readings & Case
1	Jul 5, 2021	<ul style="list-style-type: none"> <li>Course Overview and Introductions</li> <li>Introduction to Globalization of Business</li> <li>Introduction to Case Analysis</li> <li><b>HK &amp; SINGAPORE</b></li> </ul>	<ul style="list-style-type: none"> <li>Text: Ch. 1-2</li> <li>Case: Hyundai Securities: International Expansion (Ivey, 9B14M052)</li> </ul>
2	Jul 7, 2021	<ul style="list-style-type: none"> <li>The Institutions of Global Business</li> <li>Political Economy</li> <li>Cultural Norms</li> <li><b>SAUDI ARABIA</b></li> </ul>	<ul style="list-style-type: none"> <li>Text: Ch. 3-4, 8</li> <li>Exercise: Where Have You Been? (Ivey, 9B16M140)</li> <li>Case: Medical Equipment in Saudi Arabia (Ivey, 9B07C042)</li> </ul>
3	Jul 12, 2021	<ul style="list-style-type: none"> <li>Trading Internationally</li> <li>Applying strategic models to a global setting</li> <li><b>UKRAINE</b></li> </ul>	<ul style="list-style-type: none"> <li>Text: Ch. 5-6</li> <li>Case: Managing a Severe Crisis: PharmaCorp in Ukraine (Ivey, 9B17M085)</li> <li>Reading: Egelhoff, William G. 2010.</li> </ul>



			“How the Parent Headquarters Adds Value to an MNC”. Management International Review. 50: 413- 431. University of Toronto Library, eJournals.
4	Jul 14, 2021	<ul style="list-style-type: none"> <li>• Macroeconomic and Non-Governmental Agencies (NGO’s)</li> <li>• Business-Gov’t Relations</li> <li>• Foreign Direct Investment</li> <li>• <b>BRAZIL</b></li> </ul>	<ul style="list-style-type: none"> <li>• Text: Ch. 7</li> <li>• Case: Brazil: Leading the BRICS? (HBS, 711024)</li> </ul>
5	Jul 19, 2021	<ul style="list-style-type: none"> <li>• International Competitiveness through Clustering</li> <li>• Integration Through Multilateral Organizational</li> <li>• <b>NETHERLANDS / KENYA</b></li> </ul>	<ul style="list-style-type: none"> <li>• Text: Ch. 8</li> <li>• Case: The Dutch Flower Cluster (HBS, 711507)</li> </ul>
6	Jul 21, 2021	<ul style="list-style-type: none"> <li>• From Entrepreneur to International Firm</li> <li>• <b>Covid Reflection Due</b></li> <li>• <b>AUSTRIA</b></li> </ul>	<ul style="list-style-type: none"> <li>• Text: Ch. 11</li> <li>• Case: Zotter - Living by Chocolate (HBS, 810091)</li> </ul>
7	Jul 26, 2021	<ul style="list-style-type: none"> <li>• Entering Foreign Markets</li> <li>• Facing Global Competition</li> <li>• <b>LEBANON</b></li> </ul>	<ul style="list-style-type: none"> <li>• Text: Ch. 13</li> <li>• Case: Chabros International Group: A World of Wood (Ivey, 9B10M100)</li> <li>• 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 &amp; Governance, February 2012, Volume, 16(Issue1)Page, p.107-124</li> </ul>
8	Jul 28, 2021	<ul style="list-style-type: none"> <li>• JV’s &amp; Alliance Strategies</li> <li>• International M&amp;A</li> <li>• Global Leadership</li> <li>• <b>INDIA</b></li> </ul>	<ul style="list-style-type: none"> <li>• Text: Ch. 12</li> <li>• Case: Eli Lilly in India: Rethinking the Joint Venture Strategy (Ivey, 9B04M016)</li> <li>• Reading: Developing global leaders. By: Ghemawat, Pankaj, McKinsey Quarterly, 00475394, 2012, Issue 3</li> </ul>
9	Aug 4, 2021	<ul style="list-style-type: none"> <li>• Global Functional Strategies</li> <li>• Outsourcing Strategy</li> <li>• <b>Country Assessment Due</b></li> <li>• <b>RUSSIA, ESTONIA, FINLAND &amp; SWEDEN</b></li> </ul>	<ul style="list-style-type: none"> <li>• Text: Ch. 19-20</li> <li>• Case: Tallink: Connecting Estonia to Finland, Sweden and Russia (Ivey, 9B05E016)</li> </ul>
10	Aug 9, 2021	<ul style="list-style-type: none"> <li>• Global Good Governance</li> <li>• <b>QATAR &amp; KUWAIT</b></li> </ul>	<ul style="list-style-type: none"> <li>• Text: Ch. 16-17</li> <li>• Case: Corporate Governance Standards: Qatar Telecom Acquires Wataniya Telecom (Ivey, 9B09M048)</li> </ul>
11	Aug 11, 2021	<ul style="list-style-type: none"> <li>• Re-thinking Globalization</li> <li>• <b>USA</b></li> </ul>	<ul style="list-style-type: none"> <li>• Text: Ch. 14-15</li> <li>• Case: Uniqulo: Reexamining American Expansion (Ivey, 9B18M067)</li> </ul>

12	Aug 16, 2021	<ul style="list-style-type: none"> <li>• Social Responsibility in the International Context</li> <li>• <b>Group Global Strategy Assignment Due &amp; Final Webinars</b></li> <li>• <b>CHINA</b></li> </ul>	<ul style="list-style-type: none"> <li>• Text: Ch. 9-10</li> <li>• Case: Fiji Water – Green Makeover or Greenwashing (Ivey, 9B09A008)</li> <li>• Group Webinars</li> </ul>
Final Term Test	TBD	<ul style="list-style-type: none"> <li>• Final Take-Home Term Test</li> </ul>	<ul style="list-style-type: none"> <li>• All course PowerPoint material will be testable on the final take-home term test</li> </ul>

## Your Lecturer

**Jan Klakurka** is Chair and tenured Associate Professor in Management and Organizational Studies at Huron University College, Western University and is a 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 nine more in academia. Prior to the Academy, Jan was Director, Corporate Planning & Business Development, reporting to the founder-CEO and leading and delivering strategy for a mid-tier, \$100M 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's recently published in the journal *Foresight* on the future of higher education.

Jan has taught *Strategic Management* at University of Toronto since 2005 (UTM: 2005-2009, Rotman: 2012-2021), Huron (2014-2021), and Laurier (2013-2015). Jan's other core teaching courses are *International Business* (now *International Strategy*) (2012-2021, including MBA in 2014) and *Management Consulting* at Rotman School of Management (2011-2021) where he introduced the Real-Life Consulting Project that has now delivered over 115 actual consulting projects for RC students with billion-dollar companies, SME's, charities, and even Monitor Deloitte. He also regularly taught *Introduction to Management* at Rotman Commerce each summer (2011-2019). In 2014, he designed, developed and began teaching a Summer Abroad (SA) course for Rotman/UofT at Masaryk University In Brno, Czech Republic called *Strategy in the European Context* that is going into its seventh year (2014-2019, all SA's cancelled 2020, 2021). At Huron @ Western, Jan has introduced *Organizational Governance* (2017-2020) with a Real-Life Board Assessment (of not-for-profit Boards in SW Ontario) and *Strategic Foresight & Furturing* (2018-2020), Canada's only undergraduate business course in future studies. He has also taught the general management Ivey LEADER (Leading Education in Emerging Regions) program in Dnepropetrovsk, Ukraine (1998) and Minsk, Belarus (1999), 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.

Jan has published in *Foresight*, a leading futures studies journal and has an upcoming co-authored book chapter on Values and Foresight-infused Governance. Jan presents at academic conferences globally, most recently at the European Academy of Management (Summer 2021 & Fall 2020), Institute of Competitiveness (Spring 2020), Scenario 2018 held at Warwick University (2018) on the future of the academy, and at Constructing Social Futures hosted by the University of Turku's (Finland) Institute for Future Studies (2019) on leadership values as they inform foresight tendency and strategy. Jan is one of three co-developers for Huron's highly successful new interdisciplinary major in Governance, Leadership & Ethics (GLE).

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, travel, white-water kayaking, and strategic investments. His greatest project is having fun with his two daughters who are now fifteen and thirteen 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 in the IT up-cycling market, and on the finance committee of the Mansfield Ski Club.

## **APPENDIX A: Instructions for Accessing Course Material for International Strategy (RSM490H1S SECTION (All) Summer 2021)**

The logo for the Ivey School of Business, featuring the word "IVEY" in a large, bold, serif font.

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: Jun 18, 2021

Ending: Aug 31, 2020

- 1 Go to the Ivey Publishing website at [www.iveycases.com](http://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=29386>
- 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.
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