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APÊNDICE

Neste anexo é apresentado o questionário para levantamento de percepções dos executivos da Wärtsilä envolvidos nesta pesquisa, as instruções para seu preenchimento, assim como os resultados percentuais das respostas de múltipla-escolha. Após consulta ao departamento de Recursos Humanos da Wärtsilä, foi recomendada a redação do documento em inglês para que fosse distribuído aos executivos de diferentes subsidiárias.

**Survey of the Strategic Implications of Alliances & Networks of
Companies Competing at a Global Level: The case of Wärtsilä**

The following survey is part of a wider research related to business strategy conducted by Dr. T. Diana L. v. A. de Macedo-Soares, Full Professor of the Administration Department at PUC-RIO (Pontifical Catholic University of Rio de Janeiro/ Business School).

The goal of this survey is to capture the perceptions of the Wärtsilä executives about the impact of Strategic Relationships, notably Alliances, on the company's performance. The survey is aimed at executives that take part in managerial decisions at Wärtsilä.

This questionnaire is not a test (there's no wrong or right answer). If a question cannot be answered for any reason, it will be disregarded. However, we emphasize the importance of the provided information for the study development and request your support to get questions answered properly.

Please note that this survey is voluntary. No further obligations are tied to the participation in this survey. The data retrieved from this survey will be handled in strict confidentiality and used solely for academic purposes. Under no circumstances will be disclosed or transferred data or information provided by respondents, nor will they be used for any purpose other than the academic proposed here. The final results of this study may contain fragments of the respondents' opinions. However, we guarantee that identities of respondents will not be disclosed and will not consider any response or comment as the "official" position of the company.

In case you have questions regarding this survey, please contact:

- Eduardo Bessa
- Telephone: +55 21 8285 1100
- Email: bessa_eduardo@hotmail.com

The due date to submit the answers is 15 october,2013.

Thank you for taking time to participate in this survey!

Questionnaire

Part 1 – Demographic Questions

Please select the area you are part of:

11%	Board of Directors
34%	Planning
	Marketing
22%	Commercial Area
	Technical (Product/ Services)
	Legal or Regulatory
11%	Human Resources
	Financial
22%	Other = Sales

In your business organization, what's your position?

56%	Director
33%	Manager
	Supervisor or Coordinator
	Technician
11%	Other

In your business organization, in which business unit do you work?

22%	Ship Power
22%	Power Plant
34%	Services
22%	PowerTech
	Other Corporate Management units (Finance, Human Resources, Communications, Legal)

Please inform how many years you have worked for the company:

	Less than 1 year
45%	Between 1 and 5 years
33%	Between 5 and 10 years
22%	Above 10 years
	Do not belong anymore to the organization
	Belong to other companies in the same business group

Please feel free to describe your main responsibilities (optional):

Part 2 – Characterisation of the Wärtsilä Strategy

1. In your opinion, what is the market strategy adopted by your company in the energy market worldwide that includes global marine markets and power plant markets worldwide?

29%	Differentiation based on quality (perceived by customer although presenting similar characteristics)
12%	Differentiation based on design (distinctive characteristics, different but not necessarily better)
24%	Differentiation based on support (something additional besides basic post sales support)
6%	Differentiation based on image (brand image and company reputation as main differentiator)
0%	Differentiation based on price (low price used to differentiate the final solution)
29%	Differentiation based on bundling (selling one or more products together).
0%	No differentiation (no clear strategy to be used as differentiator)

Definitions to better support your answer:

The strategies related to the global context could be classified as:

Global Strategy: International strategy with the main objective to compete in selected key markets in the world. Based on this strategy, company offers standardized products, services or solutions, through integrated activities that are globally coordinated. The competitive directives come directly from headquarters.

Transnational Strategy: International strategy presenting global characteristics. It involves customization to the local market (local responsiveness) in order to satisfy the wishes and needs from the local consumers. It counts on global efficiency, but balances the necessary flexibility for customization in a coordinated way with its partners, customers and suppliers. It requires interdependence and high communication flow between subsidiaries and headquarters. Subsidiaries can work as excellence centers to specific products and markets.

Multi Domestic Strategy: International strategy where both strategic and operational decisions are decentralized and under responsibility of each business unit in the different countries where the company performs. This strategy allows the Local Business Unit to adapt its products to the local market. It requires low interdependence and low communication flow between subsidiaries and headquarters.

Global Multibusiness Firms: Strategy is similar to transnational companies, but with the perception that certain companies incorporate different value-added activities separated into different businesses units. The individual units remain somewhat independent with loose administrative and close financial oversight.

2. In your opinion, how would you classify the Wärtsilä international strategy?

0%	Multi domestic
45%	Global
33%	Transnational
22%	Global Multibusiness Firms
0%	Don't know

Part 3: Wärtsilä Strategic Impact of Alliances and Networks

Definitions to better support your answer:

Alliances are voluntary arrangements or partnerships between companies that involves exchange, sharing, or co-development of products, technologies or services. Alliances can be considered strategic when they contribute directly to the company's competitive advantage. Examples of alliances: joint ventures, partnerships for R&D (Research & Development), long term supplier contracts, etc.

3. Please, evaluate the following statements: “Wärtsilä seeks to establish alliances or other linkages (mergers and aquisition) as a fundamental part of the company’s strategy”.

Not applicable	Totally Agree	Agree	Neither disagree nor agree	Disagree	Totally disagree
	56%	44%			

4. What are the main factors that Wärtsilä takes into account when establishing a strategic alliance? Please choose the three (3) main factors:

33%	Access to information provided by the new relationship
0%	Access to financial capital provided by the new relationship
11%	Access to social capital provided by the new relationship
33%	Access to political capital provided by the new relationship
0%	Economy of scale
56%	Knowledge sharing with new partners
0%	Financial Risk management
22%	Cost sharing
44%	Cost reduction when considering new market entrance
11%	Uncertainties / risk management
67%	Complementary competence sharing
33%	Tighter commercial relationship
0%	Better positioning in the face of political and institutional changes
0%	Not applicable

5. The strategic alliances that Wärtsilä takes part in are typically...

78%	Bilateral (Alliances constituted between two entities, for example, between focal company and partner)
	Multilateral (Alliances constituted by more than two entities, for example, a focal company and several suppliers)
22%	Both
	Wärtsilä does not take part in alliances.
	Don't know

Definitions to better support your answer:

Complementors: Participant that supplies a product or service constitutes a complement to main company's solution in such way that final product or service is perceived by customer with higher value than a company operating individually and separately.

6. Wärtsilä establishes strategic alliances or takes part in strategic networks with.....

Types of partnership	Yes	No	Don't know
Customers	78%	22%	0%
Suppliers	78%	22%	0%
Substitutes	0%	67%	33%
Competitors	67%	22%	11%
New entrants	11%	56%	33%
Complementors	56%	33%	11%
Governmental Bodies	44%	33%	22%

7. Please provide examples of companies / organizations with which Wärtsilä takes part in alliances strategic for each applicable sector.

Customers: _____

Suppliers: _____

Substitutes: _____

Competitors: _____

New entrants: _____

Complementors: _____

Governmental Bodies: _____

8. In case your answer to Question #5 was "Multilateral" what are the main participants in these alliances? Choose the three (3) most important ones:

	Customer
22%	Suppliers
22%	Substitutes
	Competitors
	New entrants
	Complementors
	Governmental Bodies

9. Please, select the three (3) main kinds of alliances or linkages that Wärtsilä considers most important in the case of each partner category.

Types of Linkages	Customers	Suppliers	Substitutes	Competitors	New Entrants	Complementors	Government
Merger/ Acquisition	11%	11%		33%		56%	
Joint-venture	44%			33%	11%	44%	11%
Cross Shareholder participation		11%			11%		
Minority Shareholder Investment							
Joint R&D	11%	11%		22%			11%
Development/ Co-production	11%	33%			11%	22%	
Commercialization/Joint Marketing efforts						33%	11%
Patent Licensing or know-how	11%	22%		11%		22%	
Transfer of technology		11%				11%	
Raw material supply deal/ Contract		33%					
Service supply deal/ Contract	44%					22%	
Publicity and advertising deal/ Contract		11%		11%			22%

Definitions to better support your answer:

The Value Net is the network constituted by the focal company, its complementaries, competitors, suppliers and others. **The Value Net** works as a schematic map that represents all players in the business environment and the interdependencies that contribute to the focal company's competitive advantage.

A Strategic Network is formed by the set of business relationships, both horizontal and vertical, with other organizations - suppliers, customers, competitors and other entities - including relationships that cross boundaries of industries and countries. Strategic Networks are composed of strategic alliances and other linkages, i.e, Linkages that contribute directly to the company's competitive advantage.

Opportunities are defined as potential earnings provided by macro-environmental factors - political, economic and socio-environmental factors - or industry structural factors, external to the company.

Threats are defined as losses, risks and changes potentially unfavorable arising from the same factors above mentioned.

10. Please, select the most appropriate answer related to Wärtsilä:

	Not applicable	Totally disagree	Disagree	Neither disagree nor agree	Agree	Totally Agree
Wärtsilä's participation in strategic alliances and networks impacts its strategy and global performance.	11%				67%	22%
Wärtsilä's participation in strategic alliances and networks may represent better real or potential business opportunities for Wärtsilä.					89%	11%
Wärtsilä's participation in strategic alliances and networks may represent greater real or potential threats for Wärtsilä.	11%		22%	22%	33%	11%
Wärtsilä's participation in strategic alliances and networks represents neither opportunities nor threats at industry level.	22%	56%	22%			
The large number of existing relationships between members of Wärtsilä's value network is a strong barrier to entry of new entrants in the market.	11%		44%	33%	11%	

11. Please, evaluate the following statement: "alliances are changing the intensity (to greater or lesser degree) of competition in the energy industry." (Check the box that best reflects your view on this statement)

Not applicable	Totally Agree	Agree	Neither disagree nor agree	Disagree	Totally disagree
		67%	22%	11%	

12. If you agree or fully agree with the statement of the previous question, explain in what sense you see these changes.

Definitions to better support your answer:

Key customers are companies or groups that have leadership in the markets where they operate, competitive advantage over their competitors, and/or good prospects in the long term in terms of competitiveness.

Key suppliers are companies that provide raw materials or services to Wärtsilä which represent a large portion of Wärtsilä's cost and / or that are unique sourcing options.

Key competitors are companies that compete with Wärtsilä in the same markets with similar products, equivalent bargaining power or hold the same market share. Key competitors are those that exert the greatest competitive pressure on the competition.

13. Considering the statement above, please, select the most appropriate answer related to Wärtsilä:

Statement	Not applicable	Totally disagree	Disagree	Neither disagree nor agree	Agree	Totally Agree
As part of its strategy, Wärtsilä establishes strategic alliances with its key competitors in order to mitigate competition growth.	22%	45%	33%			
Wärtsilä seeks to identify key customers with whom it can have interests to establish long-term relationships.	11%				67%	22%
Wärtsilä seeks to establish and strengthen long-term relationships with key suppliers.	11%			11%	45%	33%
As part of its strategy, Wärtsilä establishes global alliances to increase its competitiveness in the global context.				33%	45%	22%

Part 4: Characteristics of Alliances

Definitions to better support your answer:

Network density refers to the proportion of global linkages identified in the company's relationship network related to the maximum possible number of global linkages.

Scope refers to the breadth/coverage of the alliance/network in terms of geographic market, customer group or market segment. The more focused and specific is the alliance, the narrower it's the scope.

Centrality characterizes the relative position of the focal firm (in this case Wärtsilä) in relation to other network players. The higher the relationship of the focal company with other players in the network, the greater its centrality.

14. Considering the definitions above, the density (proportion of global connections) of Wärtsilä's network can be classified as:

Partner	High Density	Low Density	Not Aplicable
Customer	67%	22%	11%
Suppliers	89%	11%	
Substitutes		22%	78%
Competitors		44%	56%
New entrants		11%	89%
Complementors		78%	22%
Governmental Bodies		67%	33%

15. Considering the definitions above, the scope (breadth/coverage of the alliance/network) of Wärtsilä's network can be classified as:

Partner	Wide	Restrict	Not Aplicable
Customer	45%	44%	11%
Suppliers	44%	56%	
Substitutes		22%	78%
Competitors		44%	56%
New entrants		11%	89%
Complementors	11%	56%	33%
Governmental Bodies		67%	33%

16. Considering the definitions above, the Centrality (relative position of the focal firm in relation to other network players) of Wärtsilä's network can be classified as:

Partner	Central	Intermediate	Peripheral
Customer	15%	9%	
Suppliers	15%	12%	
Substitutes		3%	
Competitors		9%	
New entrants		6%	
Complementors	3%	16%	
Governmental Bodies		12%	

17. Considering the statements below, please, select the most appropriate answer related to Wärtsilä in your point of view:

Statement	Not applicable	Totally disagree	Disagree	Neither disagree nor agree	Agree	Totally Agree
Wärtsilä seeks to establish relationships in order to occupy a central position in the value net of the Global Energy Market					100%	
Wärtsilä seeks to establish relationships in order to occupy a central position in the value net of the Latin America Energy Market				11%	67%	22%
<i>Wärtsilä seeks to establish relationships in order to occupy a central position in the value net of each country where it operates.</i>			11%	11%	78%	

18. Considering Wärtsilä's strategic alliances, please, select the most appropriate answer in your point of view:

Statement	Not applicable	Totally disagree	Disagree	Neither disagree nor agree	Agree	Totally Agree
"Wärtsilä seeks to establish alliances with.... Key customers"	11%				56%	33%
"(...) Key Suppliers"					78%	22%
"(...)Competitors"	33%	11%	11%	44%		
"(...)Complementors"	11%		22%	11%	33%	22%
"(...)Substitutes"	67%	11%	11%	11%		
"(...)New entrants"	78%		11%	11%		
"(...) Governmental Bodies"	33%		11%	22%	33%	

Definitions to better support your answer:

Key Resources are resources including competencies both of the company and its partners/alliances networks that are complementary, valuable, inimitable, and without replacements, relevant to achieving the company's strategic goals.

19. What kind of key resources Wärtsilä seeks from its partners by way of strategic alliances networks? (Check mains key resources for each partner category).

Partner	Customers	Suppliers	Substitutes	Competitors	Complementors	New entrants	Governmental Departments
Information capital	22%	33%		11%	11%		44%
Financial resources	56%				11%		22%
Social capital	44%	11%		11%	11%	11%	33%
Political capital	11%			44%		11%	44%
Technological resources		89%		22%	33%		11%
Humam resources		11%		11%	33%	11%	11%
Inovation capability	22%	56%		11%	33%	22%	

20. How would you evaluate each partner in relation to its contribution to Wärtsilä in terms of key resources?

Partner	Rich in Key Resources	Poor in Key Resources	Not applicable
Customer	67%	22%	11%
Suppliers	78%	22%	
Substitutes		11%	89%
Competitors	33%	22%	45%
New entrants		11%	89%
Complementors	22%	45%	33%
Governmental Bodies	11%	45%	44%

21. How would you evaluate resource complementarity in the case of Wärtsilä's global partners?

Partner	High Complementarity	Low Complementarity	Not applicable
Customer	45%	22%	33%
Suppliers	56%	33%	11%
Substitutes		11%	89%
Competitors		44%	56%
New entrants	22%	11%	67%
Complementors	45%	33%	22%
Governmental Bodies	22%	33%	44%

22. Classify the volume of key resources provided by each strategic partner with whom Wärtsilä establishes strategic alliances.

Partner	Abundant	Satisfactory	Insufficient	Not applicable
Customer	13%	63%	13%	11%
Suppliers	25%	63%	12%	
Substitutes			12%	88%
Competitors		25%	12%	63%
New entrants		13%	12%	75%
Complementors	13%	12%	25%	50%
Governmental Bodies		38%	12%	50%

23. Classify the key resources' access level for each strategic partner with whom Wärtsilä establishes strategic alliances.

Partner	Easy	Difficult	Not applicable
Customer	63%	25%	12%
Suppliers	75%	13%	12%
Substitutes		12%	88%
Competitors		37%	63%
New entrants		25%	75%
Complementors	24%	38%	38%
Governmental Bodies	12%	38%	50%

24. How would you evaluate each type of Wärtsilä's partner regarding its operations: Global, Regional, or Local? (In case a variation of geographical scope exists for partners, please mark the option that indicates major representativeness for those partners).

Partner	Global	Regional	Local	Not applicable
Customer	22%	22%	45%	11%
Suppliers	67%	22%	11%	0%
Substitutes	0%	0%	22%	78%
Competitors	33%	12%	11%	44%
New entrants	0%	22%	11%	67%
Complementors	22%	0%	33%	45%
Governmental Bodies	0%	11%	56%	33%

Definitions to better support your answer:

Connection strength in an alliance can be understood as the difficulty of severance the alliance, as the commitment level between partners, as the alliance's durability or the difficulty in replacing the partner for another due to the type of contract or agreement between the parties involved.

25. Evaluate, in general terms, the strength of connections (commitment level and / or contractual formalization) between Wärtsilä and its partners in key strategic alliances.

Partner	Strong	Medium	Weak	Not Applicable
Customer	33%	45%	11%	11%
Suppliers	56%	44%		
Substitutes				100%
Competitors			33%	67%
New entrants		11%	11%	78%
Complementors		44%	12%	44%
Governmental Bodies		33%	33%	34%

Definitions to better support your answer:

The nature of alliances can be opportunistic (win-loose) when they present a disproportional advantage for one or more of the partners. In order to have collaborative alliance (win-win) it is necessary to have a power balance between partners.

26. As to the nature of strategic alliances established by Wärtsilä with its partners, please mention if they are opportunistic (win-loose) or collaborative (win-win).

Partner	Opportunistic	Collaborative	Not Applicable
Customer	33%	56%	11%
Suppliers		100%	
Substitutes			100%
Competitors	11%	22%	67%
New entrants		11%	89%
Complementors		78%	22%
Governmental Bodies		56%	44%

Definitions to better support your answer:

An alliance is **explorative** when it seeks to develop new resources/competencies together with its partners.

An alliance is **exploitative** when it seeks to use existing resources/competencies with its partners.

27. Classify the main strategic alliances established by Wärtsilä with each partner in terms of being explorative or exploitative.

Partner	Explorative	Exploitative	Not Applicable
Customer	33%	22%	45%
Suppliers	56%	33%	11%
Substitutes		11%	89%
Competitors		33%	67%
New entrants	11%		89%
Complementors	56%	11%	33%
Governmental Bodies	11%	22%	67%

28. Evaluate the geographical scope of the alliances established by Wärtsilä with each partner in terms of being global, regional or local.

Partner	Global	Regional	Local	Not Applicable
Customer	22%	33%	33%	12%
Suppliers	67%	22%	11%	0%
Substitutes	0%	0%	33%	67%
Competitors	22%	12%	33%	33%
New entrants	0%	11%	22%	67%
Complementors	45%	0%	22%	33%
Governmental Bodies	0%	11%	56%	33%

Part 4 - Alliances Management:x

29. Does Wärtsilä have performance indicators to evaluate to what extent alliances contribute to the company's global performance?

89%	Yes
	No
11%	Don't know

30. In your opinion, are these indicators adequate and sufficient?

67%	Yes
11%	No
22%	Don't know

31. In case of negative answer, please explain

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32. What are the performance indicators used by Wärtsilä to measure how strategic alliances contribute to the company's global performance?

27%	Financial
27%	Operational
27%	Customer satisfaction
19%	Innovation
	Social capital
	Informational capital
	Don't have pre-established indicators

33. Does Wärtsilä have governance mechanisms for its strategic alliances (contracts, deals, committees, etc) to establish certain standards when dealing with partners?

100%	Yes
	No
	Don't know

34. In your opinion, are these mechanisms adequate and sufficient?

67%	Yes
11%	No
22%	Don't know

35. In case of a negative answer, please explain.

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36. When establishing alliances, what are the means used to ensure alignment between Wärtsilä and its partner?

24%	Operational strategy
10%	Corporate culture
7%	Managerial style
17%	Resource complementarity
28%	Product/ Service complementarity
14%	Customer acceptance
	Don't have pre-established means

37. How does the company guarantee the strategic alignment between its alliance and its own business?

44%	Through formally established processes
21%	Through formal processes under development
14%	Through informal initiatives
	Doesn't possess processes or initiatives
21%	Don't know

38. The following lines are reserved for additional comments, if necessary:

Thank you for your attention and support!