

【課程內容說明】

產業內外的動態競爭 (competitive dynamics, 以下簡稱 CD), 是產業結構演進、以及個別廠商績效的重要決定因素; 因此, 如何思考建構策略性作為、預期競爭對手的回應, 從而導引有利於策略目標達成的競局, 是高階經理人必須建立的能力。

此一 EMBA 首開的選修課程將提供學習者瞭解競爭動態的整合架構與分析工具, 透過前沿的競爭動態學術研究成果、深度個案討論、學習者的實作與輔導, 期望能夠協助學習者建立競爭動態的思考架構、策略規劃方法、以及 CD 前沿知識的應用能力。

本課程特別邀請目前任教於美國維吉尼亞大學達頓商學院 (The Darden Graduate School, University of Virginia) 的陳明哲教授返國, 將其在達頓商學院 MBA/EMBA 開授之動態競爭課程, 帶到臺大 EMBA 的課堂, 可謂難得的學習機會。陳教授不僅是國際知名的策略學者, 最近更被選為國際管理學會的副主席 (詳見課程大綱後附之簡歷), 2007 年臺大管理學院並頒予「玉山知識管理講座教授」榮譽。

【選修對象】

本課程適合已經修過策略管理 (STM) 核心課程的同學, 我們尤其歡迎對競爭策略議題有興趣的同學, 帶著您實務上所面臨的問題到課堂上研討。

【上課/課程說明時間】

本課程採兩週末、四天 (7/4-5, 11-12) 密集上課方式進行, 其中 7/4 下午適逢 96 畢業典禮, 將待選課同學確定後調整。

為協助選課同學於課前進行充分準備, 我們將於 6/11(四)舉行課程說明會, 並於 6/16(二)、6/23(二)兩天晚上提供課前導讀單元。

【其他】: 有任何對本課程內容與執行有疑問的同學, 請與李吉仁教授 (jiren@ntu.edu.tw) 聯絡!

**National Taiwan University
Competitive Dynamics Seminar**

July 4, 5, 11, & 12, 2009

**Professor Ming-Jer Chen
Leslie E. Grayson Professor of Business Administration
The Darden Graduate School, University of Virginia**

**Professor Ji-Ren Lee
Department of International Business
College of Management, National Taiwan University**

Assistants: Professors Sheng-Tsung Hou and Hao-Chieh Lin

Course Description

Business competition is both dynamic and relative. It is defined by the interplay between companies as they constantly juggle their market positions by exchanging moves and countermoves. The soundness of a firm's strategy and actions—and even its performance—must be considered in the context of its competitors' actions.

This advanced strategy seminar provides class participants with an integrative framework and specific analytical tools for understanding how firms interact in the marketplace—within an industry, across industries, and beyond national borders. The premise of the course holds that when a company initiates a competitive move (a new product introduction, expansion into a new market, an acquisition bid, or a simple price cut), it should be prepared to meet potential counteractions from rivals. Understanding the relative nature of this dynamic process is the key to building and sustaining competitive advantage.

Through exposure to cutting-edge academic research, the course will examine, in depth, the broad context in which competitive interaction occurs. Participants will be expected to abstract larger strategic issues from financial and operational particulars, and to apply the concepts, analytical tools, and research methods learned in class to an intensive project on competition. Drawing heavily from the instructor's work on this topic, as well as from participant-led discussion, the seminar intends to engage participants on two fronts: bridging application and scholarship, and maximizing the student-centered learning experience. This format and orientation have proved to appeal to EMBA's committed to both intellectual rigor and practical relevance.

Course Objectives

- To enhance participants' competitive thinking and analytical skills in conducting industry and market analysis
- To expose participants to established and emerging academic research and its direct business implications
- To show broad applications of interactive competitive analysis to other business topics such as JV partnership and stakeholder analysis

- To develop a learning community through intense interactions among all members of the class
- To give participants the opportunity to produce applied research and case publications

Learning Points

- Interactive nature of business competition
- Analysis of a competitive attack
- Prediction of competitive reactions
- Dynamic global competition
- Competitor analysis
- Multimarket, multiproduct/business competition
- Indirect competition
- Competition-cooperation

Target Audience

The seminar is designed to develop an appreciation for cutting-edge research and its application to pertinent competitive issues—an essential skill for managers responsible for developing and implementing business strategies as well as for strategy consultants advising these managers. It presumes working knowledge of the basic principles of business strategy. The course will be especially useful to those interested in high-level business-strategy consulting, advanced strategic planning and marketing, and industry security analysis, as well as anyone seeking to develop sophisticated competitive thinking or interested in further developing his or her business research and analysis training.

Class Time

During the first weekend we will devote the class to the exploration of basic concepts by reading six academic articles. Two groups of participants will be assigned to lead each class/article discussion. These participant-led discussions aim to illustrate basic concepts with current business examples and, more importantly, to develop ideas for the participants' own term project research.

In-Class Discussion and Written Report

Each team needs to submit a written report extended from the discussions of assigned academic articles. The details of this written report (and the in-class discussion itself) will be specified later.

Term Project

The seminar has a strong research component. The project (carried out by every team with three or four members) is an integral part of the course and will require intense interaction and discussions between the teams, the class as a whole, and the instructor. The project aims to apply some of the concepts that have been learned from academic articles or to extend and expand these concepts to the business context. It is equivalent to a take-home term paper, and the class should expect to devote a considerable amount of time to the project. Given the relatively brief period of the term, participants will be encouraged to get their hands “dirty”

early on in order to engage in the intellectual inquiry and business application. The instructor recommends that groups start working on their topics as soon as the term-project assignment is made in order to have enough time to conduct in-depth research. The quality of the final report of this project should aim for the level of thoroughness and follow the style of such leading business publications as the *Harvard Business Review* and the *McKinsey Quarterly*, or a business case or technical note of top quality.

Note: The details of this project and the assignments will be made later.

Course Materials

陳明哲 (Ming-Jer Chen) 著，蘇國賢審訂，林豪傑、喬友慶、侯勝宗翻釋與整理，2008，”
動態競爭策略探微”，台北：智勝。

Key articles from the book, as well as cases and prominent manuscripts, will constitute the bulk of the reading assignments. Our selection of readings supports the belief that “research breeds research” and that systematic knowledge accumulation over time is the best way to advance applied scholarship.

Grading

Individual class contribution	25%
Participant-led class discussion and written report	25%
Term project	50%

Design Philosophy/Caveats

The course is shaped by the belief that all class participants—including the instructor—are “learning partners” in the process of creating and accumulating knowledge, from philosophy to theory/concept to practice; therefore the seminar is a collaborative investigation of the dynamic and relative nature of business competition.

Asking the right questions is the key not only to strategy and business management but also to research and case teaching. The instructor will use the Socratic method to help class participants develop a strategic-question mindset that will ultimately benefit both their business and personal endeavors.

One approach to “applied scholarship”—the cornerstone of business education—is to conduct constant dialogue between prominent academic ideas and practical business application. Over the past 20 years, a body of business strategy literature has emerged that takes a general management or organizational perspective of business competition. The instructor’s research is central to the development of this literature, and for this reason, the assigned academic readings draw heavily from his work.

This seminar has some distinct features. First, it will require intense participant involvement throughout the course. Second, the instructor considers his role of coach in this course central to the process of learning; therefore, I will interact closely and informally with all participants throughout the term.

Although the seminar is about competition, we will study this subject in a very cooperative way. The success of the course depends on each participant pulling his or her own weight in both the term project and the group-led discussions in class. Knowledge building is a group effort, and information derived from today's projects may be used for future research activities. Contributions from the class in this regard will be fully acknowledged.

Also important: The class is built on mutual trust and the willingness of its participants to support each other. Because peer review and support are important contributions to intellectual progress, they are highly encouraged—and required—in this class.

Session Outline

July 4 (Saturday)

Session 1	9:00 – 10:30	Competitive Dynamics: Case Analysis and Application
		<p><u>Case:</u></p> <p>“The Battle for Logan Airport: American Airlines vs. JetBlue” (UVA S-116 (A))</p> <p>[Group discussion questions will be assigned in class.]</p> <p><u>Assignment:</u></p> <ol style="list-style-type: none"> 1. What should Joe Smith do? Should AA respond to JetBlue’s entry into Logan Airport? Why or why not? 2. If AA decides to respond, what considerations should it take into account? Specifically, what should its response look like? 3. In anticipating AA’s potential reaction, how should JetBlue prepare? 4. In light of the AA-JetBlue rivalry, what should other airlines do? <p><u>Readings:</u></p> <p>“Competitive Dynamics Research: An Insider’s Odyssey” (Ming-Jer Chen), <i>Asia Pacific Journal of Management</i>, 2009, 26: 5-25. (動態競爭策略探微第一章)</p> <p>“Competitive Dynamics: Competition as Action- Response” (UVA-S-0123).</p> <p>“Competing for Advantages: From Industry Analysis to Competitive Action” (UVA-Draft)</p> <p>“預測競爭對手的回應：AMC 三環透視法” (Ming-Jer Chen, 2009)</p>
Break	10:30 – 10:45	
Session 2	10:45 – 12:15	Competitive Dynamics: Case Analysis and Application (continued)
		<p><u>Case:</u></p> <p>“The Battle for Logan Airport: American Airlines vs. JetBlue”</p> <p>[UVA S -117 (B) and S-118 (C) will be distributed in class.]</p>
Lunch	12:15 – 13:30	
Session 3	13:30 – 15:00	Competitive Attack and Retaliation
		<p><u>Reading:</u></p> <p>“Nonresponse and Delayed Response to Competitive Moves: The Roles of Competitor Dependence and Action Irreversibility” (Ming-Jer Chen and Ian MacMillan), <i>Academy of Management Journal</i>, 1992, 35(3): 539–570. (動態競爭策略探微第三章)</p>
Break	15:00 – 15:15	
Session 4	15:15 – 16:45	Firm Scale and Competitive Behavior
		<p><u>Reading:</u></p> <p>“Speed, Stealth, and Selective Attack: How Small Firms Differ from Large Firms in Competitive Behavior” (Ming-Jer Chen and Donald C. Hambrick), <i>Academy of Management Journal</i>, 1995, 38: 453–82. (動態競爭策略探微第五章)</p>

July 5 (Sunday)

Session 5	9:00 – 10:30	Competitor Analysis and Interfirm Rivalry
		<p><u>Reading:</u> “Competitor Analysis and Interfirm Rivalry: Toward a Theoretical Integration” (Ming-Jer Chen), <i>Academy of Management Review</i>, 1996, 21: 100–34. (動態競爭策略探微第十章)</p>
Break	10:30 – 10:45	
Session 6	10:45 – 12:15	Multimarket Competition and Indirect Competition
		<p><u>Reading:</u> “Multimarket Maneuvering in Uncertain Spheres of Influence: Resource Diversion Strategies” (Rita G. McGrath, Ming-Jer Chen, & Ian C. MacMillan), <i>Academy of Management Review</i>, 1998, 23: 724–40. (動態競爭策略探微第十一章)</p> <p>“Indirect Competition: Strategic Consideration (UVA-S-0102) and Resource Diversion” (UVA-S-0103).</p>
Lunch	12:15 – 13:30	
Session 7	13:30 – 15:00	Executive Leadership and Competitive Behavior
		<p><u>Reading:</u> “Executive Dynamics, Competitive Response, and Firm Performance: An Integrated Investigation” (Ming-Jer Chen & Hao-Chieh Lin, Working Paper)</p>
Break	15:00 – 15:15	
Session 8	15:15 – 16:45	Competition-Cooperation
		<p><u>Reading:</u> “Reconceptualizing the Competition-Cooperation Relationship: A Transparadox Perspective” (Ming-Jer Chen), <i>Journal of Management Inquiry</i>, 2008, 17(4): 288-304.</p>

July 11 (Saturday)

Session 9	9:00 – 10:30	Global Competition and Cooperation: Case Analysis and Application
		<p><u>Case:</u></p> <p>“The Battle of the Asian Transshipment Hubs: PSA vs. PTP (A)” (UVA-S-109)</p> <p><u>Assignment:</u></p> <ol style="list-style-type: none"> 1. What are the economics of the ports industry? What are the economics of the shipping industry? How does the industry economics drive the competitive strategies? 2. What are the competitive strengths and weaknesses of PSA and PTP? How do these strengths and weaknesses affect their strategies and actions? 3. Why didn't PSA respond to Port Klang's actions in the mid 90s? 4. Analyze the competitive actions between PTP and PSA (in terms of, for instance, relative scope and speed of response). 5. What should PSA do? How might PTP respond to PSA's actions?
Break	10:30 – 10:45	
Session 10	10:45 – 12:15	Global Competition and Cooperation: Case Analysis and Application (continued)
		<p><u>Case:</u></p> <p>“The Battle of the Asian Transshipment Hubs: PSA vs. PTP” [UVA-S-110 (B) and S-111 (C) will be distributed in class.]</p>
Lunch	12:15 – 13:30	
Session 11	13:30 – 15:00	Project Presentation and Discussion (I)
Break	15:00 – 15:15	
Session 12	15:15 – 16:45	Project Presentation and Discussion (II)

July 12 (Sunday)

Session 13	9:00 – 9:45	From Research to Application
Break	9:45 – 10:00	
Session 14	10:00 – 11:30	Project Presentation and Discussion (III)
Break	11:30 – 11:45	
Session 15	11:45 – 13:15	Project Presentation and Discussion (IV)
Lunch	13:15 – 14:30	
Session 16	14:30 – 16:00	Taking Competitive Initiative: Case Analysis and Application
		<p><u>Case:</u></p> <p>“Gillette’s Launch of Sensor” (HBS 9-792-028)</p> <p>[PP handouts will be distributed in class]</p> <p><u>Assignment:</u></p> <ol style="list-style-type: none"> 1. Should the Sensor be launched as a cartridge or a disposable razor? 2. When should Gillette launch the Sensor (now, a year from now, or in a several years)? How much advertising should be used to launch the Sensor Razor: say \$100 million, \$50 million, \$25 million? (Note: \$25 million is still more than any competitor would spend.) 3. How sustainable is the Sensor Razor? What might competitor response be and when? What may delay competitor response? How should Gillette prepare for that response? 4. Based on your experience, what does it take to be a successful global company engaging in multinational competition? What advice would you offer John Symons?
Break	16:00 – 16:15	
Session 17	16:15 – 17:00	Wrap-up
		<p><u>Readings:</u></p> <p>“Reflecting on the Process: Building Competitive Dynamics Research” (Ming-Jer Chen), <i>Asia Pacific Journal of Management</i>, forthcoming.</p>

陳明哲 博士

陳明哲博士，現任美國維吉尼亞大學達頓商學院講座教授，是全球著名的企業策略專家、動態競爭理論創始人，並在2009年被選為全球擁有超過18,000位會員的國際管理學會(Academy of Management)副主席，且將於2011年擔任主席。

陳教授於1988年在馬里蘭大學取得企管碩士與博士學位，曾先後任教於哥倫比亞大學商學院與賓夕法尼亞大學華頓商學院，其教學、研究及諮詢範圍橫越歐、美、亞三洲。在教學方面，陳教授是美國幾所著名商學院最受學生歡迎的教授；他講授的企業策略、動態競爭，以及中西企業策略思維等課程均深受好評。

在研究方面，陳教授著作甚豐，是第一位三次榮膺國際策略管理學會最佳論文獎和《管理評論》最佳論文獎的學者。後來，他也擔任《管理評論》此一世界頂級學術期刊的副總編。另一方面，陳教授也是全球華人企業策略研究的先鋒，他整合西方科學與東方哲學觀點來探討競爭與合作關係的論文，被Journal of Management Inquiry推選為2008年最佳論文。此外，他於1997年在華頓商學院創辦了西方第一個以華人企業為研究對象的「全球華人企業發展中心」。他的著作《全球華人企業透視—世界企業經理導引》由哈佛大學商學院出版社出版，《外交事務》雙月刊曾評論推薦此書。中文版的《動態競爭策略探微》一書，分別由台灣智勝出版社與北京大學出版社出版，收錄了陳教授歷年來重要的十二篇學術論文與治學心得。

在策略諮詢方面，陳教授經驗豐富。他曾為多家著名的跨國企業提供諮詢與高階經理人培訓，這些企業包括：美國聯合技術、默克製藥、聯邦快遞、杜邦、美國鋁業、友邦保險、美國鐵姆肯、摩根斯坦利、慕尼黑再保險、比歐西氣體，以及英國勞斯萊斯公司等。陳教授也曾應邀參加世界經濟論壇於2000年在北京主辦的「中國企業高峰會」，2004年在紐約舉行的「美國—中國企業執行長高峰論壇」和在漢堡舉行的「中國—歐洲企業高峰會」，2006年與2007年在阿根廷布宜諾斯艾利斯、巴西聖保羅和義大利米蘭舉行的「世界商業論壇」，以及2007年在中國北京舉行的「中國CEO論壇」等國際高峰會，並擔任主講人。

陳教授的研究理念及活動見諸於世界主要媒體的專訪及報導，包括《華爾街日報》、《金融時報》、《美國新聞與世界報導》、《今日美國》、《福布斯》、《新聞周刊》、CNNfn、路透社、《亞洲週刊》、《明報》、《人民日報》、中央電視台、《財富中文版》、《經濟日報》、《哈佛商業評論中文版》等。陳教授也在2008年榮獲台灣天下雜誌從文化、商業、政經領域中，所票選出來的全球72位典範人物之一。

陳教授長年致力於年輕管理學者的培訓。1997年與2006年曾二度應中國國家教委MBA指導委員會邀請，2004、2006與2007年曾三度應台灣國科會邀請，分別在北京與台北培訓當地的管理學者。同時，他也先後受邀擔任英國帝國理工學院、香港中文大學、台灣大學、政治大學等多所學校的客座講座教授。

陳教授出身台灣、祖籍福建，曾經投身大儒之門，修習四書五經、先秦諸子等中國古典著作，深得中華文化的精髓。