

INTERNATIONAL OPERATIONS

MSc International Innovation Management

Williams, Nathan
2126256@student.uwtsd.ac.uk

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Introduction

In today's business environment, the ability to raise your global profile to explore developed and emerging markets around the world, increases exposure to new opportunities that could reduce cost, increase trade and grow businesses. This paper analyses nine countries throughout South America, Asia and Africa (see annex a for listed countries) that may present Griffiths and Hughes Ltd with a suitable location to strategically position themselves, in order to manufacture, market and distribute their products on a global scale. Three countries were then selected from the overall list, one country from each area. Mumbai – India, Durban- South Africa and Montevideo- Uruguay, were selected and analysed for suitability, focussing on five key topics: manufacturing and production, logistics and transportation, marketing and business engagement, skills & capabilities of the local workforce, political climate and cultural and social implications. This paper also briefly explores the ISO 56000 series and aims to highlight how this could help develop sustained innovation and business growth.

Mumbai – India

Manufacturing & Production

In 2022 India overtook the UK to become the 5th largest economy when ranked by nominal GDP, increasing by over 700% in the last 25 years (Myers, 2020). In 2021, industry contributed around 26% of annual GDP (Statista, n.d.). In a 2017 report, Deloitte described India as the fastest growing service sector in the world with the lowest share of services employment (2017), with significant opportunities in key services sectors, such as IT, financial services, retail, railways, energy, logistics and start-ups.

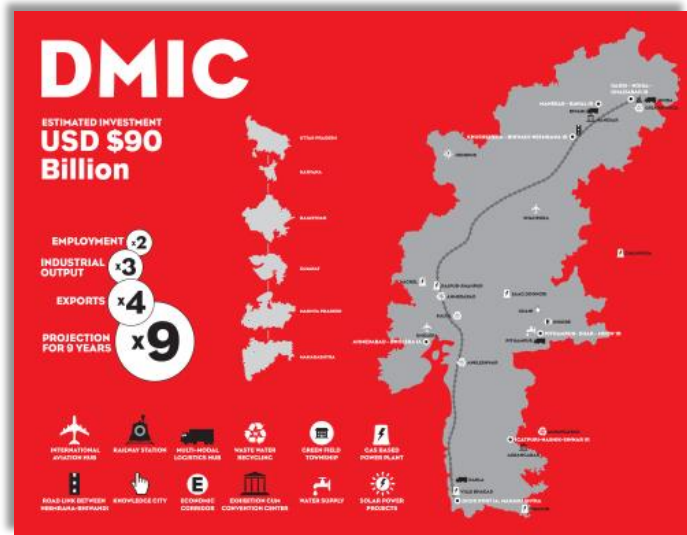


Fig 1. DMIC Info-graph (graphic courtesy of DMIC)

In 2006 Indian and Japanese governments announced plans for a US\$100 billion, joint industrial development project called the Delhi Mumbai industrial corridor (NDMIC). NDMIC links the political capital, Delhi, and the business capital, Mumbai, spanning 1484Km (Make in India, n.d.) creating high-tech road infrastructure aiming to double employment potential, triple industrial output in five years and quadruple exports from the region (P. Bholane, 2019). In 2020 a further 11 industrial corridors were approved, including development of 24

industrial regions, eight smart cities and industrial townships offering 'plug and play' solutions for foreign businesses and investors. The India Industrial Land bank geographic information system, advertises available units for new domestic and international businesses and allows them to browse purpose-built manufacturing facilities at over 4000 parks in India, online.

Indian electronics manufacturing also attracts global attention and is projected to reach US\$ 520 billion by 2025 (India Brand Equity Foundation, 2022). In 2022, Apple moved production of its iPhone 14 model to its manufacturing facility in Chennai. By December 2022, Apple's exports from India had hit \$1 billion (India Brand Equity Foundation, 2022) with a further 25% of manufacturing expected to move to the country (Reuters, 2023). Lenovo and Amazon also announced plans to ramp up manufacturing in the country, with IBM already investing US\$ 7 billion in design and R&D facilities (India Brand Equity Foundation, 2022).

Mumbai's capital, Maharashtra, regarded as the financial centre and industrial hub of India (Shira, 2019), ranks the 25th wealthiest city in the world (Amoils, 2022). Its manufacturing sectors include textile, automotive, gold and rough jewel cutting. The city also boasts a flourishing software and IT sector with direct links via the Mumbai-Pune corridor to the Pune knowledge cluster, bringing together academia, R & D institutions and industry. Software Technology Parks of India (STPI), develops and promotes innovation, Industry 4.0, R&D and start-ups and has constructed parks in Mumbai and Navi-

Mumbai (Ministry of Electronics and Information Technology (MeitY), n.d.). The 2022 Global Innovation Index ranks India 1st among the 10 economies in Central and Southern Asia and 40th among the 132 economies featured in the GII 2022 (Dutta et al., 2022).

The seven GII pillar scores for India



Fig 2. Picture ref GII 2022

Logistics & Transportation

Road

Mumbai is well connected by national highways and road networks. A 6-lane highway connects Mumbai to Pune with construction underway to complete the 8 lane NDMIC, linking industrial clusters and smart cities.

Ports

The Mumbai Port Trust and Jawaharlal Port Trust are the cities two major ports, providing the largest port facilities in India handling more than a third of the country's trade (Mumbai Port Authority, n.d.) The Mumbai port handles break bulk to unitisation, palletisation and containerisation and is equipped with specialised berths for handling petrol, oils, lubricants and chemicals, handling 59.89 million tonnes of traffic in 2022 (Mumbai Port Authority, n.d.).



Fig 3. The Mumbai Port Trust and Jawaharlal Port (Pic Ref housing.com)

Connected to over 200 ports around the world, the Jawaharlal port is located in Navi Mumbai (JNPA), and handles around 50% of the total containerized cargo volume and (The Jawaharlal Nehru Port Authority (JNPA), n.d.), delivers 81.13 million tonnes of total cargo (The Jawaharlal Nehru Port Authority, n.d.)

Rail

Central, western and harbour line, make up Mumbai's transport network. While metro and monorail projects, provide rapid high-capacity, inner-city transfer (Shira, 2019). Connecting workers and industrial clusters, the US\$ 15 billion, Mumbai Ahmedabad High Speed Rail project aims to serve 92,900 passengers per day in each direction by 2053, with the nation's first bullet train reducing commuter times to 2hrs

(Invest India, 2019). The Western Dedicated Freight Corridor (WDFC) transports double-stack freight containers between Jawaharlal Nehru Port, Mumbai and Dadri, (Kumari, 2022).

Aviation

The 2 terminal Chhatrapati Shivaji International Airport, India's second busiest airport, registered around 20 million passenger movements in 2021. Construction is also underway for the Navi Mumbai International Airport, aiming to handle complex cargo and around 90 million passenger per year (Invest India, 2019).

Marketing & Business Engagement

India's vast investments in infrastructure offering 'plug and play' manufacturing facilities and supply chain networks, improve the ease of doing business and help attract foreign direct investment (FDI). The 'Make in India' programme focusses on facilitating investment, fostering innovation and enhancing skill development, while making legal and bureaucratic processes easier. The success of the project reflects recent world bank 'ease of doing business' rankings, in which India has jumped from 134 to 63 since 2014.

The India Brand Equity Foundation (IBEF) is a Trust established by the Department of Commerce, Ministry of Commerce and Industry to promote and create international awareness of the Made in India label in markets overseas. The IBEF provides comprehensive information on the Indian economy, states and sectors aimed at global investors, international policy-makers and world media (India Brand Equity Foundation, n.d.).

Campaigns such as the 'digital India' campaign has boosted the nations digital capabilities, this is a key sector India will showcase to world leaders, during its G20 summit presidency from December 2022 to November 2023.

Skills & Capabilities of the Local Workforce

A 2011 census estimated Mumbai's population at 12.4 million (Shira, 2019). In 2020, the average Indian was only 29 years old, compared to 37 in China and the US, 45 in Western Europe and 48 in Japan. Despite the young labour force, worker skill levels struggle to keep pace with India's economic boom. The

Maharashtra government announced a 4-5 year training road map to address the issue and help build a highly skilled labour market.

Mumbai has around 85 engineering colleges, with Maharashtra boasting 239 engineering and technology colleges, 43 science colleges and the development of 3 Electronic Manufacturing Clusters (EMC) in Pune, Aurangabad and Navi Mumbai (Maharashtra Industrial Development Corporation, n.d.). The Maharashtra Industrial Development Corporation (MIDC) estimated that by 2022, around 45 million people will be trained with employable skills (Maharashtra Industrial Development corporation, n.d.).

Political Climate

India is the world's largest democracy and, according to UN estimates, its population is expected to overtake China's in 2028 (BBC, 2019). The Bharatiya Janata Party (BJP) which holds a majority in a broader coalition government, will stay in power until the end of its term in 2024 without any palpable threat to political stability (Economist intelligence, 2022).

India has long and ongoing territorial disputes with neighbouring Pakistan and China. India's close ties with Russia and failure to publicly denounce the war in Ukraine, may also cause problematic future trade with Nato countries.

Cultural & Social implications

India struggles with many social and cultural problems, such as poverty, child labour, corruption, intellectual property rights and also serious security issues.

Social inequality, violent and sexual assault against women remains an alarming and considerable statistic in Indian society. Described as the "biggest human rights violation on Earth" (Narayan, 2018) this will cause problems for corporately responsible investors and businesses.

Civil unrest and large protests are commonplace with violence and property damage probable. There is a considerable risk of terrorist attack against locations visited by British nationals and government interests (Foreign & Commonwealth Office, 2013).

Durban- South Africa

Manufacturing and production

South Africa is an upper middle-income, developed economy with mature financial, business and industrial sectors, when compared to other African nations. The country's wavering GDP was heavily impacted in 2020 following the covid pandemic and contracted by 6.6%, which later recovered in 2021 to around 4.91% due to a global commodities boom (GOV.UK, 2021). The nation's main industrial sectors are Agri processing, automotive, chemicals, textiles, metals, ICT and electronics. The country's rich mineral reserves support a booming metal industry, of which South Africa is the world's largest producer and exporter of gold, platinum and manganese and the second-largest palladium producer (Lloyds bank, 2023).

The industrial sector contributes around 25.2% of the country's GDP and employs around 22% of the workforce (Lloyds bank, 2023), with manufacturing employing around 1.6 million people (12%) (Statista, 2023).

The KwaZulu-Natal province has a diverse manufacturing industry including aluminium, petro-chemicals, automotive, steel production, plastics and paper manufacturing, much of which has developed around the Port of Durban (Department of transport, n.d.), which provides direct supply chains and export routes for businesses.

The automotive industry in KwaZulu-Natal is a major contributor to South African GDP and has attracted large global originations, such as Toyota and MAN truck, who established manufacturing facilities in the province. A number of small-medium sized electronics manufacturers, operate throughout Durban, ranging from CCTV and security systems, additive manufacturing of electronic components to Primary

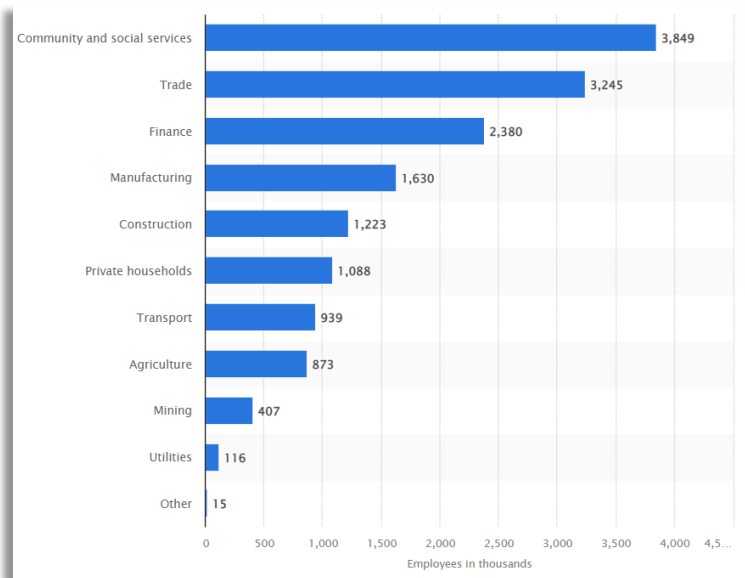


Fig 4. Employees by sector (Pic ref statista)

circuit board (PCB) assembly. There are also a number of industrial controls and automation SME'S situated in Durban and the wider province.

Situated around 30km from Durban, Dube Tradeport Special Economic Zone, offers state of the art logistical and manufacturing infrastructure, aiming to attract foreign investment. This industrial zone enticed significant investment from global electronics giants, such as Samsung, who invested

around US\$20 million in a TV factory in 2014 (Digital, 2014). South Africa ranked 2nd among the 27 economies in Sub-Saharan Africa and 61st among the 132 economies featured in the GII 2022 (Dutta et al., 2022).

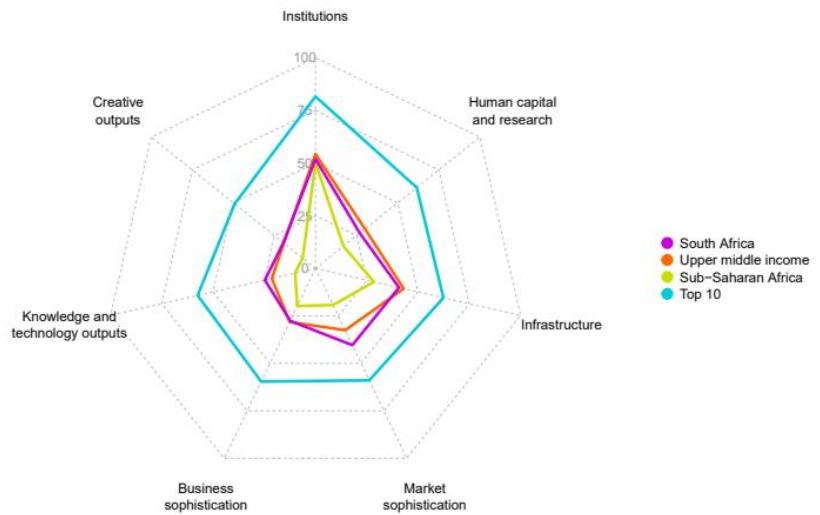


Fig 5. Picture ref GII 2022

Logistics & Transportation

Road

Durban has well developed road networks, connecting passengers and freight cargo with its port and neighbouring cities and industrial zones.

The N1 and N2 highway connect Durban to Cape town in around 17hrs, while the N3 connects with Johannesburg in around 6hrs (Google maps, n.d.).

Ports

The Port of Durban is the largest and busiest container terminal in Africa. Capable of handling 3.6 million twenty-foot equivalent units (TEU) per year, the port handles 65% of the country's container volumes (Transnet Port Terminals, 2019).

Investments of R100 billion, pledged by The Department of Public Enterprises aim to improve infrastructure over the next ten years (South African News Agency, 2021).

Rail

A 2020 report stated South Africa accounts for 80% of the Africa's rail infrastructure (Department for Trade and Industry and Deloitte, 2020). Freight cargo through KwaZulu-Natal is supported by the 'container corridor' a 688km stretch of rail network connecting Port of Durban with the Gauteng. The corridor expands trade and commerce into and beyond South Africa, linking industry clusters around the country.

Passenger rail is conducted via a metro rail service through Durban and the wider province. Although service operator Transnet claim to invest around R30 billion per year (Department for Trade and Industry and Deloitte, 2020), there are widespread media reports of poor serviceability of infrastructure and declining commuter use.

Aviation

Durban King Shaka International Airport (DIA), located approximately 35Km from the city and port, provides passenger and cargo transportation. DIA transports the majority of air freight in the province, however the shorter runway restricts fully laden aircraft from carrying cargo only.

Marketing & Business Engagement

Marketing campaigns such as 'Brand South Africa' aim to grow the country's brand globally, showcasing its potential as a destination for business, tourism and investment. Other campaigns such as Invest SA, help attract, retain and facilitate investment, guide and support businesses through investment processes and also help to coordinate business reforms (InvestSA, n.d.).

South Africa is also a member of several trade organisations and partnerships such as the World trade organisation (WTO), the EU-south Africa Trade, Development and Cooperation agreement (TDCA) and the Brazil, Russia India China and South Africa cooperation (BRICS). South Africa's membership of these organisation's enable the country to explore opportunities in new markets, promote trade, tourism and economic development.

Skills & capabilities of the Local Workforce

World Population Review, states that South Africa's unemployment reached 29.2% in 2020, making it the highest in the world (World Population Review, 2021). It is well documented that South Africa is suffering from skill shortages and skills imbalance, as academia struggles to keep pace with technology.

For those fortunate enough, KwaZulu province is home to several Engineering and technical colleges. Mangosuthu University (MUT), University of KwaZulu-Natal (UKZN) and the largest university in South Africa, Durban University of Technology (DUT). These help contribute skilled labour to the market.

Political Climate

Despite a troubled history, post-apartheid South Africa remains relatively, politically stable. The country's political system has struggled with widespread, deep-rooted corruption. The government also faces post covid-19 pandemic challenges, which has slowed economic growth, increased government debt and fuelled poverty and unemployment.

Cultural & Social implications

South Africa is a cultural and socially complex nation. Racial inequality still remains a challenge, as issues from the apartheid era remain. High levels of poverty and unemployment can cause protest and civil unrest. Recent adverse weather conditions caused significant damage to infrastructure, whilst energy blackouts also caused significant disruption to civilians and businesses. High crime rates and violent attacks directed at foreign nationals and migrants also present a high risk to investors.

Montevideo – Uruguay

Manufacturing and production

Uruguay has one of the most stable and fastest growing economies in Latin America, with World Bank reporting Uruguay's economy grew by 4.4% in 2021 and forecasted a 2.7% increase in 2022 (World Population Review, 2021). Mining, textiles, chemicals, food and beverage production and a growing paper industry, are some of the main sectors in Uruguay's manufacturing industry.

The country also has a booming IT and software development industry. Nearsure approximate 550 IT companies operate in the nation, with most IT SME's, basing themselves in Montevideo (Baliero, 2020). Uruguay's policy for the Promotion and Development of Industrial and Scientific Technological Parks, help pave the way for industrial infrastructure investment and innovation. Eight industrial parks were approved offering turnkey solutions for businesses.

35min from the city's port, the Parque Industrial Polo Logístico Ruta 522, Logistics and industrial park in Montevideo, offers businesses with a 500,000 m2 logistics site, fiscal area of 30,000 m2 and an industrial space of 60,000 m2 and is well connected by rail and road link.

Economic zones help to increase innovation, employment and trade. Tax exemptions on income, imports and exports could help boost revenue and the speed and ease of setting up businesses combined with equality between domestic and foreign businesses, create a fair but competitive business environment.

The seven GII pillar scores for Uruguay

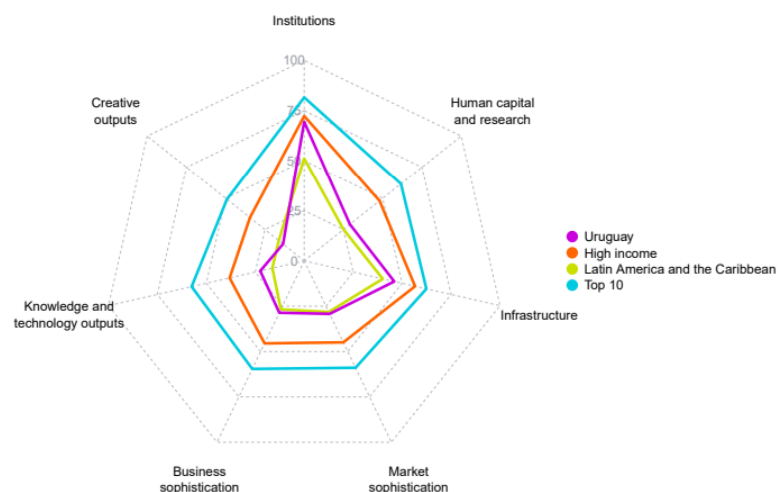


Fig 6. Picture ref GII 2022

Uruguay ranked 64th among the 132 economies featured in the GII 2022 and 5th among the 18 economies in Latin America and the Caribbean (Dutta et al., 2022).

Logistics & Transportation

Ports

Uruguay's ports with cargo movements include, Montevideo, Juan Lacaze, Zona Franca Punta Pereira, Nueva Palmira, UPM, Fray Bentos' (The Institute for Logistics, n.d.). The port is a free zone, equipped to handle cargo such as bulk containers, gas tankers and passengers. Belgium logistics firm Katoen Natie, committed USD \$455 million of investment to expand and upgrade the port's machinery and infrastructure (US department of Commerce, 2021).

Roads

A well-maintained road structure, consisting of highways and expressways, connects Montevideo passengers and freight to neighbouring regions, ports, airports and railways. In 2022 the Uruguay government announced around US\$106 million direct investment in the development and improvement of national transportation infrastructure (Department of Commerce, 2022) this will help improve business logistics and commerce. Route 1 highway connects Montevideo to Buenos Aires in around 5hrs (Google maps, n.d.) while the east ring road connects the city to its suburbs.

Rail

State Railways Administration (AFE), manages infrastructure and passenger movements while Railway Logistics Services (SELF) corporation, handle freight movement (Institute of National Logistics, n.d.). Despite government investment in the rail network, there has been a reported decline in the use of rail cargo transportation in recent years, due to the poor serviceability of infrastructure.

Aviation

Carrasco International airport (MVD), located just outside the city centre, handles regional and international passenger flights and freight. The terminal has capacity to host 4 million passengers a year and in 2018 handled 2,074,668 passengers (Montevideo airport, n.d.).

Marketing & Business Engagement

The Investment Export and Country Brand Promotion Agency, promote exports, investments and country image to strengthen export capacity and competitiveness.

Along with Argentina, Brazil, Paraguay Uruguay, Venezuela and Bolivia, Uruguay is a member of the Southern Common Market (MERCOSUR), who together promote and generate business and investment opportunities through the competitive collaboration of the Latin American member state economies into the international market.

Skills & Capabilities of the Local Workforce

The country's education and labour skillset is one of the best in Latin America however, the Uruguay government still faces complex challenges.

A report published by the international labour organisation, noted a major challenge of Uruguay's labour market was 'Low achievement in basic skills leaves the labour force insufficiently prepared to deal with the impacts of accelerated technological change', also adding the country's 'economic upswing has not been matched by improvements in educational attainment, indicating a lack of crucial skills to support Uruguay's economic growth (International Skill Organisation, n.d.).

In an article on Uruguay emerging tech industry, Nearsure stated 'Currently, 11% of all college students enrol in Engineering programs, although many other students are opting to enrol in other degrees such as electronics and information technologies, which are also highly demanded by IT companies. Overall, the country produces 1 engineer per 8,000 inhabitants' (Baliero, 2020).

The 2022 Coursera global skills report, ranked Uruguay as 76th in the world, rating its 'skill in business' as lagging, 'skill in business' as competitive and emerging in 'data science' (2022).

Political Climate

Uruguay is a transparent, politically stable country, with GOV.uk describing the political party system as 'one of the most institutionalised in the world' (UK Department for International Trade, 2022). The US Department of State suggested 'Uruguay's profound political consensus around its most important values

has turned it into a beacon of democratic principles, human rights protections, and progressive social policies, highlighting its strong governance on issues such as corruption and equality.

The Government's reformed policies continue to attract FDI, with the world bank group ranking the country 101 in the world for ease of doing business and 66 for starting a business (The World Bank, 2020).

Cultural & Social implications

Despite the strong social and democratic policies, Uruguay still has some social and cultural challenges. High youth unemployment recorded at 10.45% in 2021 (The global economy, 2020) combined with disparities in education, could impact the availability of skilled labour for businesses.

What is ISO56000? and how can it help grow Griffith and Hughes LTD?

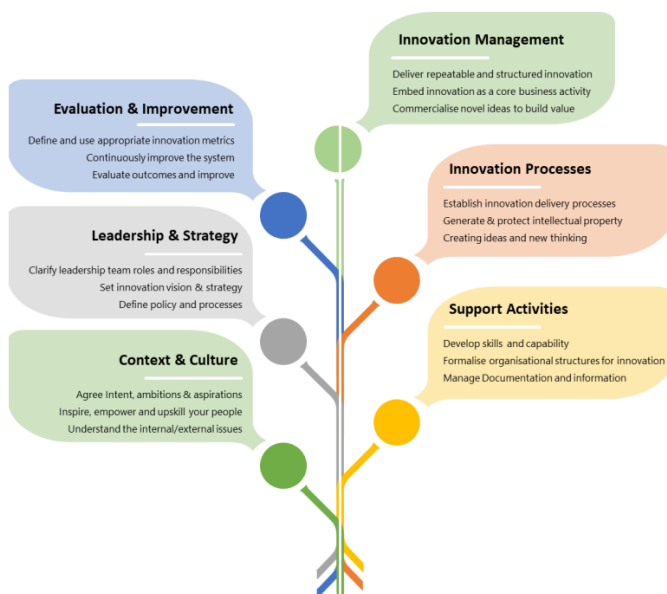


Fig 7. ISO 56000 Series – core components (Pic ref ISO 56000 Handbook)

In today's business environment, labour and resource is scarce, time is precious, and margins become increasingly tighter. Innovation is often used as a marketing tactic or 'buzz word', with businesses employing no real strategy toward real innovation. Built around a set of core components (Fig 7.), the ISO 56000 Series provides organisations with a comprehensive framework to guide and enable businesses to create an innovative business model and culture. The series will help Griffith and Hughes LTD contextualise current organisation structure, operating environment and vision, to identify risks, new opportunities, key stakeholders and influencers.

The standard helps generate ideas and deploy solutions through collaboration, offering guidance on designing and delivering innovation management plans.

In summary, using tool, key competencies and metrics, the series gives Griffiths and Hughes the tools to create and employ an achievable, sustainable and measurable innovation management strategy to help grow the business and react to changes in operations or the markets.

Summary

India is a rapidly emerging powerhouse economy. Indias 'plug and play' industrial and technology facilities, offer Griffiths and Hughes a wide selection of locations to base operations, while purpose built transportation networks provide sound logistic infrastructure. A booming manufacturing and IT sector, highlight a strong market demand for its products and will be sustained by a growing talent pool from a young population and large number of engineering and technical colleges. The presence of businesses such as Amazon and Apple, should also bolster confidence the operating climate and market for electrical goods. A relatively stabile government, intent on raising Indias global manufacturing profile, should also reassure Griffiths and Hughes that the current political agenda does dramatically change in the coming years, although consideration towards security and equality of workers is essential.

South Africa's presents a more challenging operating enviroment. Its wavering economy has struggled to recover post covid pandemic. Its industrial sector is largely focussed around mining and agri-processing, presenting a smaller market for electrical goods compaired to India. An underdeveloped education system and poorly skilled labour market, could present significant recruitment challenges. South Africa has a developed infrasture although reports suggest considerable investment is required, this could impact transportation and logistics. There are strong trade ties with other Arican states, which may present new opputunities and markets. The government is relatively stabile, although complex issues such as corruption and policy reform may trigger social unrest. Careful considerations regarding workers security should be made.

Uruguay has a strong economy with a growing IT, software and tech sector. FDI is widely promoted with the development of Industrial and Scientific Technological Parks, Free Zones and tax relief for businesses, something that Griffiths and Hughes could capitalise on. Sizable investment pledges should guarantee sound infrastructure improvements providing strong networks for trade and commerce. Collaborative ventures such as MERCOSUR, will help promote global trade and throughout Latin America. Finding Skilled workers in Uruguay's diminishing labour pool may present challenges, although there is focus on engineer and technology training to deliver skilled workers to growing IT and Manufacturing sectors. Uruguay's government is political stabile, with Uruguay nationals living socially secure.

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Annex a

Griffiths & Hughes want to strategically position themselves to control the manufacture, marketing, and distribution of their products on a global scale. With the main headquarters and facility remaining in Wales the organisation has conducted an initial investigation in terms of suitability - , and has shortlisted the following possible locations for further consideration:

<u>South America</u>	<u>Asia</u>	<u>Africa</u>
Porto Alegre (Brazil)	Shenzhen (China)	Durban (South Africa)
Montevideo (Uruguay)	Mumbai (India)	Bulawayo (Zimbabwe)
Buenos Aires (Argentina)	Taipei (Taiwan)	Tunis (Tunisia)