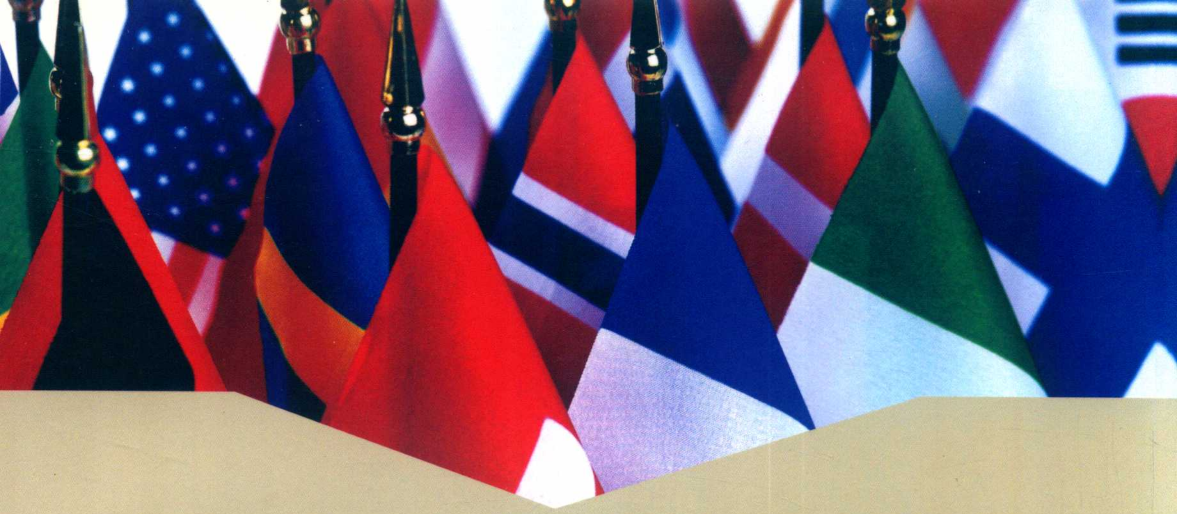

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宿荣江　龙云　编著

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龙云 毕业于清华大学外语系，获博士学位，现为北京第二外国语学院英语学院副教授，硕士生导师，主持省部级项目2项，入选“北京市属高校青年拔尖人才”。

前　　言

一个经济快速发展的国家必然要与世界各经济发达国家和地区在各项领域拓宽科技交流。而在消化吸收各国新技术的同时，也应向外域展示其固有的文化底蕴和产品及服务特色，这个过程亟待商务谈判的介入。然而，真正有效的商务谈判是在收集对方运营信息的基础上，对已知信息和数据进行分析与总结，从中推导出对手的优势和劣势，最终达到共赢。相反，低效或粗略的商务谈判常使双方陷入困境，甚至使枝节问题演变成巨大的商务沟通障碍，随之而来的是谈判双方的误解、信息和报价的错误，最终导致谈判双方不欢而散。

《国际商务谈判案例汇编》为商务英语方向的学生提供了谈判的先期案例及分析，包括四个谈判对手的企业运营案例。通过介绍公司运营背景并分析对方经营的特点和发展趋势，为与其谈判提供了先期的准备和预案。为体现商务谈判的真实感，案例和分析问题都使用了英文，同时也提供了相应的中文翻译。每个案例后面都列出了该公司运营中存在的问题，问题后面罗列了分析对手的思考点（Focus）和展开的分析（Analysis）。通过阅读对方公司介绍，了解、分析其运营的整个过程和特色，才能在谈判的过程中较为准确地把握商机。

本书的策划得到北京第二外国语学院英语学院龙云主任的大力帮助，在编写的过程中得到赵燕飞和丁宁的技术支持，在此致谢！由于时间有限，书中难免存有差错，望读者指正。

作　者

2016年4月

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1 A G Barr plc — Case Study

公司背景简介

A G Barr plc 坐落于苏格兰，是一家生产、分销碳酸软饮料的公司，其生产历史可追溯到1875年。公司于1965成为公开股份有限公司，主要经营软饮料产品。在过去的40年间，苏格兰软饮料厂商由200家缩减到6家。该公司目前想通过调整和兼并进一步拓展市场。

Background Information

A G Barr plc manufactures, distributes and markets drinks, primarily carbonated soft drinks. Based in Glasgow, it has been manufacturing soft drinks in Scotland since 1875. Its most famous product, Irn-Bru, was first produced in 1901. Barr's became a public limited company in 1965. The business has always been associated with the Barr family and members of it own the majority of shares in the company. However, Robin Barr, the chairman, is the only member of the Barr family still directly employed in the business. Barr's has a deliberate policy of focusing on the drinks market. It does not produce any other type of product and has no interests in any other fields of business activity. It describes itself as an "independent, consumer led and profitable public company, engaged in the manufacture, distribution and marketing of branded soft drinks".

In the last 40 years, the number of soft drinks manufacturers in Scotland has fallen from around 200 to about six. Barr's is by far the biggest of those which survive. Over the years, Barr's has acquired a number of other companies. These include other soft drinks firms, particularly ones in England, such as Tizer Limited in 1972 and Mandora St Clements of Mansfield in 1988. In 2001, Findlays Limited of Edinburgh, which produces Findlays Spring Mineral Water, became a wholly owned subsidiary of A G Barr plc.

Appendix 1 gives details of the organisation of Barr's.

The soft drinks market and Barr's product portfolio

Barr's competes against internationally known brands owned by large multinational companies, like Coca-Cola and Pepsi-Cola. It does so by a combination of brands which it owns itself and brands belonging to other companies which it manages in the UK.

Branding is highly significant in the soft drinks market. It means that companies must have funds available to spend on marketing their products. At the same time, they have to be able to produce in sufficient quantities to gain economies of scale in production.

Traditionally, Barr's strength is in Scotland where Irn-Bru is the leading grocery brand name. The company has a long-standing aim to increase sales south of the border. Sales there have been rising but they remain small compared to sales in Scotland. Nonetheless, Irn-Bru is now one of the top 100 grocery brands in the UK. It is the third biggest soft drink in the UK and the top non-cola brand. In most developed countries Coca-Cola is comfortably the market leader but, in Scotland, this is not the case. In 2003, sales of Irn-Bru in Scotland exceeded those of Coke.

Although brand names such as Coke, Pepsi and Sprite are known all over the world, the actual drinks are often produced and distributed by locally based companies. In some cases, these companies are subsidiaries of the big multinationals. In other cases, separate companies, like Barr's, produce and market the drinks under licence from the brand owner. These partnership arrangements, known as franchise agreements, normally last for a specified period of time such as five years. Barr's has the UK franchise for Orangina and for Lipton Ice Tea.

These operations do not always run smoothly. Barr's originally agreed a deal for Orangina with the French company, Pernod Ricard, for the period 1995 – 2001. In late 1999, the French government vetoed a proposed take-over by Coca-Cola of Pernod Ricard. A year later, rumours that the brand was to be sold to Cadbury Schweppes, another soft drinks manufacturer, did not materialise. These events caused considerable uncertainty for Barr's. However, in the event, Pernod Ricard retained ownership of the brand and Barr's was able to extend its franchise deal.

Appendix 2 summarises the main brands that Barr's owns and manages.

Building brand awareness

Barr's has a policy of developing its own brand identities. It has chosen this in preference to producing supermarket own label products which are low profit lines.

Barr's uses a range of promotional activities but makes considerable use of advertising. It sees this as a vital part in maintaining an up-to-date image for its products, particularly as carbonated soft drinks are mostly bought by young people. Barr's is proud of its reputation for using innovative tactics alongside tried and tested methods.

Irn-Bru is an example of how Barr's has tried to build brand share and brand loyalty. A new design for it was launched in 1993 which increased the amount of blue on cans and bottles to contrast with the orange. Orange has been a key colour in recent advertising for Irn-Bru, which has followed an edgy humorous theme. The TV advert featuring "Jef" won the "Best Commercial" award at the 2002 Scottish Advertising Awards following the success of the "Electric Lady" advert which gained the Chairman's award in 2001. The advertising has not always met with everyone's approval.

Appendix 3 gives two examples of complaints received by the Advertising Standards Agency.

Barr's tailors its advertising and promotional activities very closely to the situation of the brand involved. For example, it uses different advertising and promotional methods for Irn-Bru in Scotland and England. In Scotland the aim is to maintain brand awareness while in England the brand is still growing and awareness has to be increased.

Tizer also illustrates the building of a brand. It, too, was re-launched in 1993 with new packaging featuring a red plastic bottle and accompanied by advertising and other promotion. In late 1996, another redesign was introduced. This time the image was "A Red Head" and it was based around the advertising strap line of "Refresh your head". A further re-launch in 2003, repositioned Tizer as "redder" but continued to use the Tizer head, although with a more laid back facial expression. Its target market is now 13 – 15 year old boys.

In the 2002 Annual Report, Robin Barr said, "We remain convinced, however, that the continuing investment in our brands will produce for A G Barr the optimum long term growth."

Appendix 4 gives some further examples of Barr's promotional activities.

Operations

Barr's produces soft drinks in three manufacturing plants at Cumbernauld, Mansfield and Atherton in Manchester, while Findlay's Spring Water is bottled at Pitcox, East Lothian. It has six distribution depots in Scotland and six in England.

Barr's manufactures soft drinks in recyclable cans as well as glass and plastic bottles. The combination of sizes and types of containers depends on the product. Barr's controls costs of raw materials, like sugar, through rigorous procurement and purchase methods. It also has a programme of continually up-dating production facilities and investing in leading edge technology. As well as improving manufacturing efficiency, measures like these allow a greater volume of output to be produced.

In addition to its investment in operations, Barr's has recently updated its IT systems and its supply chain activity.

The importance of cost control can be illustrated by an example. During 2001 and 2002, the value of the pound was high against the Euro. One consequence of this was that it was cheaper for wholesalers in the UK to import drinks such as Coca Cola from places like Spain than to buy them from the UK producer. This situation forced UK suppliers to cut prices and had a knock-on effect on other soft drinks, even those, like Irn-Bru, that could not be sourced abroad. In 2001, for example, Barr's was forced to cut prices to wholesalers by 30%.

Employees

Barr's employs over 900 people, more than a third of whom have been with the company for 15 years or longer. It conducts an annual Employee Opinion Survey which measures the views of employees on their own jobs and the company as a whole. Communications and training and development are among the topics covered. Results are consistently positive. In 2001, for example, 81.5% of employees said that they were proud to work for the company. Barr's encourages employee involvement at every level and, as part of this, managers discuss with employees their responses to each question with a view to identifying possible improvements. Managers give a formal briefing on company developments, including trading results, to employees twice a year.

Barr's provide specialist training programmes for employees and have recently introduced an "E-learning" facility to enable employees to learn desktop PC skills. Normal terms and conditions are supplemented by some additional reward schemes. These include a Long Service Award scheme and several schemes to encourage employees to own shares in the company. More details of these are given in Appendix 5.

Exports: The Russian market

Russia is Barr's largest overseas market. In the first half of 2002, Barr's export earnings were £380,000, of which £300,000 came from sales to Russia. Barr's began exporting Irn-Bru directly to Russia in 1994 when the market opened up to western firms after the fall of the communist regime. Previously, goods like soft drinks were not readily available and awareness of all brands was low.

In 1998, Barr's entered into a franchise deal with a Russian company, KLP. KLP would produce Irn-Bru and Cream Soda under licence in a new soft drinks factory in Moscow using essence exported by Barr's from Scotland. A significant factor was the help obtained by Barr's from government agencies, particularly Scottish Trade International (STI), which is responsible for encouraging Scottish based companies to export. STI has offices in a number of foreign countries, including one in Moscow. Its contacts in Russia and elsewhere enabled it to bring together Barr's, KLP and an American firm, API, which provided the $7m needed to finance the Moscow factory.

However, the Russian economy collapsed and, despite a successful advertising campaign in 1999 essence sales to Russia in 2001 fell.

In February 2002, Barr's concluded a new franchise agreement with the Pepsi Bottling Group (PBG), the largest franchise bottler for Pepsi-Cola in the world. Irn-Bru is produced at its bottling plants in Russia and is distributed through PBG's extensive distribution network. This arrangement seems to be working well: at the end of its first year, in 2003, Irn-Bru sales accounted for almost 1% of the Russian market.

Barr's other important European market is Spain, where Irn-Bru is also produced under franchise. Sales are mainly in the tourist areas popular with Scottish holiday makers.

Appendix 6 gives some financial information on the company.

(The information in the case study is taken from the A G Barr plc Annual Reports, 1999 – 2003 and from the company's website at www. agbarr. co. uk. Additional material came from news reports from Scottish Enterprise at www. scottish-enterprise. com; from the Advertising Standards Agency at www. asa. org. uk; and from www. s1news. com; and www. trustnet. com)

Note: The above, and the accompanying appendices, are current at 1 January 2004 and refer to the situation at that date.

Appendix

Appendix 1: Company Organisation

The company's Head Office is in Glasgow, where members of senior management are based. As well as the Chairman, Robin Barr, and the Managing Director, Roger White, the executive directors are the Finance Director, the Operations Director and the Commercial Director, Jonathan Kemp, who is responsible for sales and marketing. The Group Personnel Department and the Export Team are also based in Glasgow.

Robin Barr was previously Chairman and Managing Director. He is 65 years old and joined the company in 1960. Roger White, who is in his late 30s, was appointed in 2002. Jonathan Kemp, also in his 30s, was appointed in 2003. He replaces the previous Sales and Marketing Director who left after 21 years' service. Both the other two Directors have worked for Barr's for over 25 years.

The Finance teams are spread across three locations—Glasgow, Atherton and Mansfield while the IT teams are based at Head Office and Atherton. Staff in the Operations function are located across the four production sites at Atherton, Cumbernauld, Mansfield and East Lothian as well as the Head Office in Glasgow and the Regional Office in Atherton. Administrative and clerical support for Sales and Marketing is provided by a Sales Services team based at Atherton.

Appendix 2: Barr's Brands

Barr's produces, distributes and markets the following brands in the UK.

(a) The main brands owned by the company

Irn-Bru and Diet Irn-Bru	Barr's main product. It is the leading brand name in Scotland and one of the top 100 in the UK. It is over 100 years old. Diet Irn-Bru is a sugar free version of Irn-Bru.
Tizer	Barr's second most important brand which it bought in 1972.

续 表

Simply Citrus	A range of fruit tasting drinks launched in April 2001. Available in several flavours (Florida Orange, Apple and Blackcurrant) it was the sixth fastest growing brand in the soft drinks category in the UK in 2003.
Simply Clear	A clear fruit-flavoured soft drink available in a number of flavours such as Cranberry and Passion Fruit.
D and B	This stands for Dandelion and Burdock, a traditional soft drink which Barr's has sold for many years.
KA	A recently developed Caribbean soft drink available in several flavours such as Karibbean Kola and Pineapple.
Findlays Spring	Still and sparkling mineral water. It is supplied in plastic bottles but, from 2001, the product has also been available in its own water coolers in offices.

(b) Brands produced under franchise through a partnership agreement

Orangina	An internationally known orange drink, it is available in more than 55 countries. The brand name is owned by the French company, Pernod Ricard, and A G Barr plc has held the UK manufacturing and distribution franchise since 1995. The current deal lasts until 2007. A new flavour, Orangina Rouge, was introduced in the UK in 2003 after a positive regional test. The orange carbonates market is static.
Lipton Ice Tea	This brand is owned by Unilever, a major food producing company, and, in 2002, was the 15th biggest selling soft drink by value in the world. Barr's obtained the franchise for the UK in 2001 and launched the product in the UK with a vast sampling exercise.

(c) Other products

Barr's also produces its own versions of products like Cola, Diet Cola, Shandy and Cream Soda. It has done this for some time. Some of these like Red Kola can be considered as branded products.

Appendix 3: Complaints made to the Advertising Standards Authority (ASA)

1996 Complaint

There were objections to a poster that showed a woman leaning over a man and kissing him. The advertisement read, "If I suck hard enough, maybe I can get my

Irn-Bru back". The complainants objected that the advert was offensive and in questionable taste.

The ASA did not uphold the complaint. They accepted Barr's view that the advert was intended to be humorous and that the idea in it was meant to be ridiculous and not to be taken seriously. The ASA considered that the claim would be regarded as nonsensical humour.

1998 Complaint

This involved a poster for Irn-Bru that featured a cow with a text reading, "When I'm a burger, I want to be washed down with Irn-Bru." The complainants argued that the advert was offensive.

The ASA felt that most people would not be seriously offended by the advert and that the complaint was not justified.

Appendix 4: Examples of Promotional Activity

The following are some examples of the promotional activities which Barr's has undertaken in recent years.

Barr's has gained exclusive rights for the provision of drinks at tourist attractions in Scotland such as the Falkirk Wheel and the Lomond Shores development at Loch Lomond.

In 2003, free Irn-Bru samples were given to concert goers at events in England by sales people who arrived in "Irn-Bru Scooterettes"—scooters in Irn-Bru colours. This type of "guerilla campaign" was also used successfully in 2002.

In 2002, in Scotland, the Irn-Bru Rox initiative involved sponsoring a series of events for over 14s in places such as King Tut's in Glasgow and The Venue in Edinburgh.

Irn-Bru sponsors the Xmas and New Year Carnival at the SECC in Glasgow. In 2002, this attracted over 140,000 people.

Orangina is aimed at the adult soft drinks market and sponsors the Channel 4 programme *Eurotrash* which has a target audience of 18 – 30 year olds. In 2002, both Orangina products were made available in one litre glass bottles which are seen as more attractive to adult consumers.

Barr's makes considerable use of the Internet. As well as its corporate site it has separate sites for Irn-Bru and Tizer, as well as one-off sites to tie in with particular marketing initiatives. All its websites sell merchandise associated with the product, like sports bags and tee shirts.

The Irn-Bru website is a play site with games and other activities aimed at older teenagers. In 2002, there was a one-off website to link in with the partnership between Irn-Bru and an interactive virtual 3D teen city.

Tizer has sponsored the ITV show, *cd: uk* for eight years. It has developed special characters like "Ed the Head" who have become associated by consumers with the product. This sponsorship is regarded as particularly efficient as this TV show has the greatest proportion of the target market viewing at any one time. (During much of the period, Tizer was aimed at 11 – 15 year olds.)

The Tizer website was redeveloped in 2003 to coincide with the re-launch of the Tizer brand. Now known as "ITZRED", the website is described as an "E-zine" which is interactive, visually stimulating and humorous. In 2002, there was a one-off Tizer site known as "Headz-U-Win" to coincide with an on-pack promotion.

During 2002, Tizer, in conjunction with Alcan, ran a campaign in conjunction with schools whereby containers are provided in schools for recycling. Nearly 250 schools participated in the scheme which offered prizes including musical instruments.

Findlays is the water sponsor for several high profile athletics events such as the Great North Run in Newcastle, which is televised live by the BBC. Water is a high growth market.

Appendix 5: Reward schemes

Long Service Award Scheme

This scheme has several aspects. For example, employees who reach 25 years service are given an award at a company presentation and are pictured in the Annual Report for that year.

Profit Linked Share Plan (PLSP)

Under this scheme, all employees receive shares to a value of a common percentage of their earnings up to a maximum value of £5,000 per person.

All-Employee Share Ownership Plan (AESOP)

This allows employees to make a monthly contribution which is used to buy shares in the company. For every four shares purchased the company purchase one matching share. Contributors also receive shares in the same way as the PLSP but to a maximum of £3,000 per employee.

Appendix 6: Some financial data on A G Barr plc

Review of Trading Results: 2003 – 1999

	2003 (£000)	2002 (£000)	2001 (£000)	2000 (£000)	1999 (£000)
Turnover	120,005	116,261	111,878	109,995	106,892
Operating profit	11,873	10,487	13,922	12,096	11,991
Interest	340	253	225	(114)	(312)
Profit on ordinary activities before tax	12,213	10,740	13,922	12,096	11,991
Tax on profit on ordinary activities	3,693	3,254	4,159	3,451	3,415
Profit on ordinary activities after tax	8,520	7,486	9,763	8,645	8,576
Dividends	4,496	4,202	4,200	3,813	3,545
Retained profit for the year	4,024	3,284	5,563	4,832	5,031
Earnings per share on issued share capital	43.78p	38.47p	50.17p	44.42p	44.07p
Dividend per share	23.10p	21.60p	21.60p	19.60p	18.25p

Note: Sales of soft drinks are affected by the weather. The lower profits in 2002 reflect lower sales caused by a very poor summer.