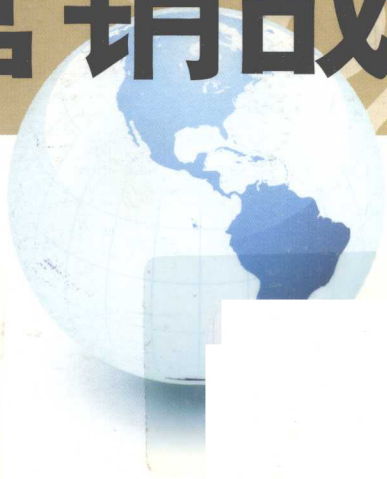


张喜民 著

# 跨国公司在华子公司 营销战略研究



山东人民出版社

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## 中文摘要

自 20 世纪 90 年代初期以来,在来华投资的外商中,跨国公司逐渐成为投资的主角。随着中国加入世界贸易组织,一股更大的跨国公司投资浪潮涌入中国。目前,全球最大的 500 家跨国公司中已有 480 多家在华投资或设立机构,其中 40 多家设立了地区总部,外商投资设立的研发机构超过 980 家。与此同时,随着国际竞争压力的增大,跨国公司开始在更大的范围内发掘其价值链的竞争优势。相关研究显示,开拓和占领中国市场已成为跨国公司在华投资战略调整的主导趋势。面对跨国公司在华子公司的深度市场推进与日趋激烈的竞争,中国政府、企业界和消费者已深切感受到跨国公司给中国经济发展和市场变化带来的重大影响。在此背景之下,有关跨国公司在华子公司营销战略的研究,便成为学术界和企业界共同关注的焦点。

相对于跨国公司研究的其他领域,有关跨国公司子公司的研究,尤其是跨国公司子公司在华营销战略研究还是一个比较新的问题:首先,国内外多数关于跨国公司在华营销战略的研究,是在模糊母子公司界限的基础上进行的,研究者往往将其研究名之为“跨国公司”在华营销战略或策略,而没有考虑营销战略的制定者到底是跨国公司母公司还是在华子公司、母子公司之间在营销战略选择上的角色和地位以及不同选择对营销战略执行可能带来的后果差异。可见,现有相关研究还存在薄弱环节。其次,现有的跨国公司营销战略模式研究,如国际战略、多国战略、全球战略和跨国战略等,依据的主要变量是跨国公司母国和东道国之间的差异,而没有更多地考虑子公司所在东道国内部,由于区域经济技术发展差距、收入差距以及区域消费习惯不同所形成的

差异,而这些差异往往是影响子公司在东道国营销战略决策的重要因素。再次,现有跨国公司子公司战略的研究,主要考虑的是子公司作为母公司战略体系中的一个单元或承担的战略角色,即把子公司作为一个独立的主体进行研究,而没有更多地考虑跨国公司子公司之间的价值链整合问题,即一个子公司的营销战略会受到其他子公司的影响,各个子公司之间是相互联结而发生作用的。因此,将跨国公司海外子公司的营销行为放到价值创造网络中综合研究,也是跨国公司子公司营销战略研究的一个新领域。

针对以上问题,本研究综合运用理论研究、实证分析与典型案例分析相结合的方法,分析了影响跨国公司在华子公司营销战略演进的主要动因,探讨了跨国公司在华子公司营销战略的演进机制,归纳出跨国公司在华子公司营销战略演进的阶段模式和演进路径,构建出跨国公司在华子公司营销战略的基本模式。

国内外相关研究认为,作为跨国公司子公司战略体系的一个单元,跨国公司子公司营销战略的选择,不仅受制于其在公司体系中的战略角色,受制于跨国公司的组织模式、管理模式,受制于子公司的存续时间、自治状况和所处的产业类型,还要受制于母国与东道国之间的文化差异和子公司的营销绩效等多种因素。但是,相关实证研究却表明,缘于母国文化的跨国公司管理模式,对于海外子公司营销战略的制定并无显著的相关关系。本书实证研究发现,营销绩效对于跨国公司在华子公司营销战略的制定并无明显关联。同时,跨国公司母公司管理模式对于在华子公司营销战略的制定起着明显的作用。关于第一个问题,本研究认为,其主要原因一是因为中国对外开放时间尚短,跨国公司在华投资的历史不长,其在外华子公司往往只处于在华经营的早期阶段,营销绩效还不能得到充分体现,尤其是子公司的营销绩效往往不是取决于子公司自身的经营能力,而取决于母公司的战略决策和经营环境的不确定性,还不具备作为营销战略决策的主要参考依据的条件。第二个原因是,中国市场是一个处于快速成长、而环境和体制尚不成熟和稳定的市场。跨国公司在华投资往往具有长期战略思维,注重的是未来收益,而不是短期得失,因此,并不会完全依据子公司的短期营销绩效改变公司的战略选择。关于第二个问题,本研究认为,其主要原因

在于在华投资的跨国公司主要来自发达国家,而且进入中国时间尚短,还没有积累丰富的在华经营信息和知识。因此,在其进入中国市场的初期阶段,往往会把源自于母国文化的母公司管理模式直接运用于在华子公司的经营,尽管跨国公司母国与中国存在较大的文化差异,而且这种管理模式不一定适合于中国市场环境,并且往往带来母子公司管理沟通的巨大成本。

跨国公司在华子公司营销战略的演进历程受到母公司因素、子公司因素和外部环境因素的共同制约。而这些因素总是处于变动之中的。外部环境会影响母公司及子公司战略的变化,母公司战略的变化则影响子公司战略的演进,子公司自身因素(如子公司的资源和能力、自治权的变化、创新精神等)的变化也会驱使子公司进行营销战略的调整,从而推动着跨国公司在华子公司营销战略的形成和演进。

本书分别从母公司战略/子公司自治权、东道国内部差异/子公司自治权、跨国差异/东道国内部差异和产业部门/子公司自治权等四个角度,构建了跨国公司子公司的营销战略模式,即一体化战略、母公司主导的调适性战略、子公司主导的调适性战略和双差异化战略。本研究发现,影响跨国公司在华子公司营销战略演进的一个关键变量在于中国营销环境的特殊性,即区域的广泛性和区域的不平衡性。中国营销环境的内在差异性,迫使跨国公司在华子公司寻求一体化战略和调适性战略的平衡,并最终引入双差异化营销战略。

依据理论分析和实证分析,本研究将跨国公司在华子公司的营销战略演进划分为一体化营销战略、调适性营销战略和双差异化营销战略三个阶段。一体化营销战略是早期进入中国市场的跨国公司在华子公司的主流战略。在华子公司一般将母公司的战略直接移植到中国市场,完全依靠来自母公司的知识和资源,成为母公司在华战略的执行者,缺乏营销决策自主权。调适性营销战略是20世纪90年代跨国公司在华子公司的主流战略。在华子公司有权依据东道国市场与母国市场的差异,适当调整母公司战略,成为不完全职能的营销决策者,但是主要知识和资源仍依赖于母公司。双差异化营销战略则是2002年以后跨国公司在华子公司的战略发展趋势。在华子公司有权依据东道国环境内部的差异化自主制定营销战略,成为完全职能的营销决策者,重视

东道国一体化绩效和差异化反应能力的整合。但是,本研究也注意到并不是所有进入这一阶段的跨国公司在华子公司都会实施双差异化战略。因为该战略的实施一般需要三个前提:一是跨国公司子公司只需关注满足差异化需求;二是东道国该产业部门市场需求规模和潜在市场空间大;三是跨国公司内部保有足够的多国化经营或跨国化经营的知识和经验积累,并且可以在公司内部自由流动。

本研究发现,跨国公司在华子公司营销战略的演进表现为两种基本模式,即渐进性模式和变革性模式。渐进性模式是指跨国公司在华子公司营销战略的演进循序渐进,呈现出明显的阶段性特征,不发生跳跃式战略调整。这种渐进式演进主要通过三条路径加以实现:第一条路径是从一体化营销战略走向母公司主导的调适性营销战略;第二条路径是从一体化营销战略走向子公司主导的调适性营销战略;第三条路径是从调适性营销战略走向双差异化营销战略。变革性模式是指跨国公司在华子公司营销战略的演进跳跃的某些阶段,从一体化战略直接调整为双差异化战略。

需要注意的是,跨国公司在华子公司营销战略的演进,不仅存在时间上的继起性和阶段性特征,而且存在空间上的并存性特征。从营销战略时间的继起性和阶段性来看,不同跨国公司在华子公司的表现特征并不一致,某些跨国公司子公司的阶段性特征甚至非常模糊。在战略的空间并存性方面,不同跨国公司子公司的表现也有差异。某些子公司营销战略的同质性特征十分明显,另一些子公司的营销战略则带有明显的异质性色彩。

本研究关于跨国公司在华子公司营销战略演进的动因、战略演进机制、战略演进阶段以及战略模式特征的探讨,既是对跨国公司海外子公司战略研究体系的延伸,也是对国际营销战略研究体系的补充。同时,也为中国企业借鉴跨国公司的跨国营销管理经验提供了学习和创新的平台,有助于中国企业制定有效的市场营销战略和策略体系,塑造中国企业国际市场营销的竞争优势和核心能力,以抵御跨国公司带来的冲击和压力,并最终走向全球市场,确立全球竞争者的地位。

关键词:跨国公司子公司 营销战略 一体化战略 调适性战略 双差异化战略

## ABSTRACT

Since 1990th, MNCS gradually become the leading actors of foreign company who come to invest in China. Along with China's WTO entry, a tide of investment by MNCS surges in China. And now about 480 MNCS of the 500 largest MNCS in the world have invested or built branch in China. About 40 of them have founded reign headquarters. And the MNCS have founded more than 980 research organizations. At the same time, MNCS begin to empire their competition of value chain by other ways. It seems that to occupy the market in China has become the chief strategy of MNCS in China. The government, the companies and consumers in China has felt the influents that the MNCS has brought to Chinese economy and market. According to what we have talked above, the research of MNCS' marketing strategy in China become the hot spot of academies and companies.

Compare with other research fields about MNCS, the research of MNC'S subsidiary company, especially the marketing strategy of the subsidiary company is a new issue in some measure. First, most research about MNCS' marketing strategy, is on the basis of parent company and subsidiary company. And the researchers always calls their research MNCS' marketing strategy in China. But they did not consider about the framer of the strategy: the parent company or the subsidiary company. And they did not think about: the difference status of them in the process of framing the strategy, the different choice may bring on different result. So there is weakness in the research fields. Second, the present researches, for instance the international strategy, the multilateral strate-



gy, the global strategy and transnational strategy, are on the basis of the difference between parent country and host country. But they did not think about inside the parent country, there technology differences, income differences, and consumer differences. These differences will affect the parent company's strategies in their own country. Third, the present researches only look the subsidiary company as a cell of the strategy system of the parent company. It means that the subsidiary company is an individual in their researches. They did not think about the conformity of the parent company's value chain and the subsidiary's: the different subsidiary companies may affect each other in the framing of their strategies. So that to research the subsidiary companies' marketing behaviors in the value chain network is a new field in the research fields of MNCS' marketing strategy.

To solve the problems above, we integrated theoretical studies with demonstration analysis and typical cases in this study. We analysis the main driving force of the subsidiaries' evolution of marketing strategy, explore the evolution of their marketing strategy, sum up the evolution of the subsidiaries' marketing strategy path and stage, construct their basic pattern of marketing strategy.

Domestic and foreign researchers' conclusions: as a module of MNC'S strategy system, the subsidiaries' marketing strategies, are not only constrained by their role in the MNC'S strategic system, by the MNCS' organization and management pattern, by their continued existence, autonomy status and their types of industry, but also constrained by a variety of other factors such as the cultural differences between home and host countries, the performance of marketing. However, empirical studies showed that there were no significant correlations between the management patterns of MNCS that base on home culture and the formulation subsidiaries' marketing strategies. Through empirical study, we found that there is no significant correlation between marketing performance and subsidiaries' strategies, but the management patterns of MNCS have significant effects on the marketing strategies of subsidiaries of MNCS in China. About the first problem, the study found that: first, it is due to China's opening up for only a short time and multinational corporations invest in China

for a short history, their subsidiaries in China often operate in China only in the early stages, marketing performance has not been fully realized. In particular marketing subsidiaries operating performance often does depend on the ability of its own. It depends on the strategic decisions of the parent company and the uncertainty of the business environment. Not as a marketing strategy with the main reference conditions. The second reason is that China is a rapidly growing market, and the environment and the system is not yet mature and stable market. MNCS are often long – term strategic thinking of investing in China, focusing on the future earnings, rather than short – term gains and losses, therefore, Marketing is not entirely based on the short – term performance of a subsidiary company to change the strategic choice. Regarding the second question, the study concluded that the main reason lies multinational corporations with investments in China mainly from the developed countries, only a short time in China, have not accumulated a wealth of information and knowledge to operate in China. Therefore, in the early stages of its access to China's markets, tend to draw from the mother culture of the parent company management model directly applied to the operating subsidiaries in China, although there is a big differences between home countries' cultural and Chinese cultural. Such management is not necessarily suited to the Chinese market environment, often bringing huge cost of communication and management between subsidiaries and parent companies.

The evolution of marketing strategy of Subsidiaries of MNCS in China affected by the parent company, subsidiaries and external environmental factors common constraints. These factors are always at the changes. Subsidiaries of the parent company and the external environment will affect the strategic changes. The changes will affect the strategy of the parent company's strategy for the evolution of their affiliates (such as subsidiaries of resources and capabilities, autonomy changes, the spirit of innovation, etc.) changes in the marketing strategy will be driven subsidiaries for the adjustment subsidiaries of multinational companies in China, thus promoting the formation and evolution of a marketing strategy.

Strategy paper from the parent company / subsidiary autonomy, the host internal differences / subsidiaries autonomy, transnational differences / host internal and industry differences / subsidiaries autonomy the four angles and so on. Construction of the subsidiaries of MNCS' marketing strategy model, the integration strategy, the parent company led Adaptation Strategies and Dual Diversity Strategies, subsidiaries led Adaptation strategies and Dual Diversity Strategies. The study found that impact on the evolution of strategic marketing subsidiaries of MNCS in China is a key variable in the marketing environment in China particularity Regional extensive and regional imbalance. The inherent differences between China marketing environment, subsidiaries of MNCS in China to seek to force integration and adaptation strategies in the strategic balance and Dual Diversity Strategy marketing strategies ultimately introduced.

Based on theoretical analysis and empirical analysis, the subsidiaries of multinational companies in China will evolve into a marketing strategy for the integration of marketing strategy, adaptability and dual diversity marketing strategy in three phases. Early integrated marketing strategy for entering the China market is mainstream strategy. Subsidiaries to the parent company's general strategy in China transplanted directly to the Chinese market, completely rely on the parent company's expertise and resources to become implement the strategy in China, lack of marketing decision-making autonomy. Since 1990s, adaptability marketing strategy become the mainstream strategy of subsidiaries of MNCS in China. Subsidiaries in China had the power to the host country market and the home market and the difference between appropriate adjustments parent strategy marketing policy makers to become fully functional, but mainly relies on the knowledge and resources of the parent company. After 2002 dual diversity marketing strategy becomes the strategic trends of subsidiary of the MNCS in China. Based on internal differences of the host country's environment, subsidiaries in China have the right to make marketing strategy independently. Then subsidiaries in China become policy makers who pay attention to the integration performance and differences reaction ability of the host country fully functional. However, the study also noted that not all subsidiaries of MNCS in China to get

to this stage will be a dual diversity strategy. Implementation of the strategy normally takes three preconditions: First, they need only satisfy different demands of customers; Second, the industry market size and potential market demand of the host; Third, multinational companies maintain adequate internal operation of the multi – national or transnational operations with the knowledge and experience accumulated. and can flow freely.

The study found that strategic marketing subsidiaries of MNCS in China are two basic models for the evolution of performance, that the progressive mode and reform mode. Progressive model means that subsidiaries of MNCS in China gradual evolution of the marketing strategy. Seen an obvious characteristic of this stage, there are no leap forward in the strategic adjustment. This gradual evolution is achieved primarily through three paths: First, the integration of marketing strategy from the parent company led to the adjustment of marketing strategies; Second, marketing strategy towards an integrated marketing strategy subsidiaries led adaptability; Third, Marketing strategy from the adjustment to double the differential marketing strategy. Mode change is the evolution of strategic marketing subsidiaries of multinational corporations in China jumping at some stage directly from the integrated strategic adjustments for the differences between the two strategies.

The marketing strategy evolvement of subsidiaries of MNCS in China, not only being ensued and staged in time, but also simultaneity occurred in space, those need our attention. Characteristic of dissimilarity subsidiaries of MNCS in China representes disaccorded on ensued and staged in time. The stage characteristics of some subsidiaries of MNCs are very illegibility indeed. In terms of the spatial coexistence of marketing strategy, the performances of various subsidiaries of MNCs also have differences. Some subsidiaries of MNCs have clear homogeneity of marketing strategy, but other subsidiaries have obvious heterogeneity.

The study about causation of marketing strategy promotion, strategy promotion mechanism, strategy promotion phases, and characteristic of strategy mode, not only extend the study system of company strategy about subsidiaries of

MNC, but also complement the study system of international marketing strategy. At the same time, it helps Chinese enterprises to learn and innovate upon transnational marketing management from MNCS' experience, establish effectual marketing strategy and tactic system, and figure competitive advantage and core capability of international marketing for resisting impulsion and pressure from MNCS, entering into Global Market finally, and establishing Global Competitors Status.

Key words: Subsidiary of MNC; Marketing Strategy; Integrated Strategy; Adjustment Strategy; Dual Diversity Strategy.

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# 第一章

## 导 论

### 第一节 选题的依据和意义

#### 一、选题的依据

自 20 世纪 90 年代初期以来,在来华投资的外商中,跨国公司逐渐成为投资的主角。随着中国加入世界贸易组织,一股更大的跨国公司投资浪潮涌入了中国。目前,全球最大的 500 家跨国公司中已有 480 多家在华投资,其中 40 多家在华设立了地区总部,设立的研发机构则超过 980 家。与此同时,随着国际竞争压力的增大,跨国公司开始在更大的范围内发掘其价值链的竞争优势。相关研究显示,开拓和占领中国市场已成为跨国公司在华投资战略调整的主导趋势。面对跨国公司在华子公司的深度市场推进与日趋激烈的竞争,中国政府、企业界和消费者已深切感受到跨国公司给中国经济发展和市场变化带来的重大影响。在此背景之下,有关跨国公司在华子公司营销战略的研究,便成为学术界和企业界共同关注的焦点。

在国外有关跨国公司海外子公司的理论研究中,以跨国公司海外子公司战略为中心的研究自 20 世纪 80 年代起成为越来越活跃的研究领域,国外学者尝试运用不同的理论方法,从不同的研究角度对海外子