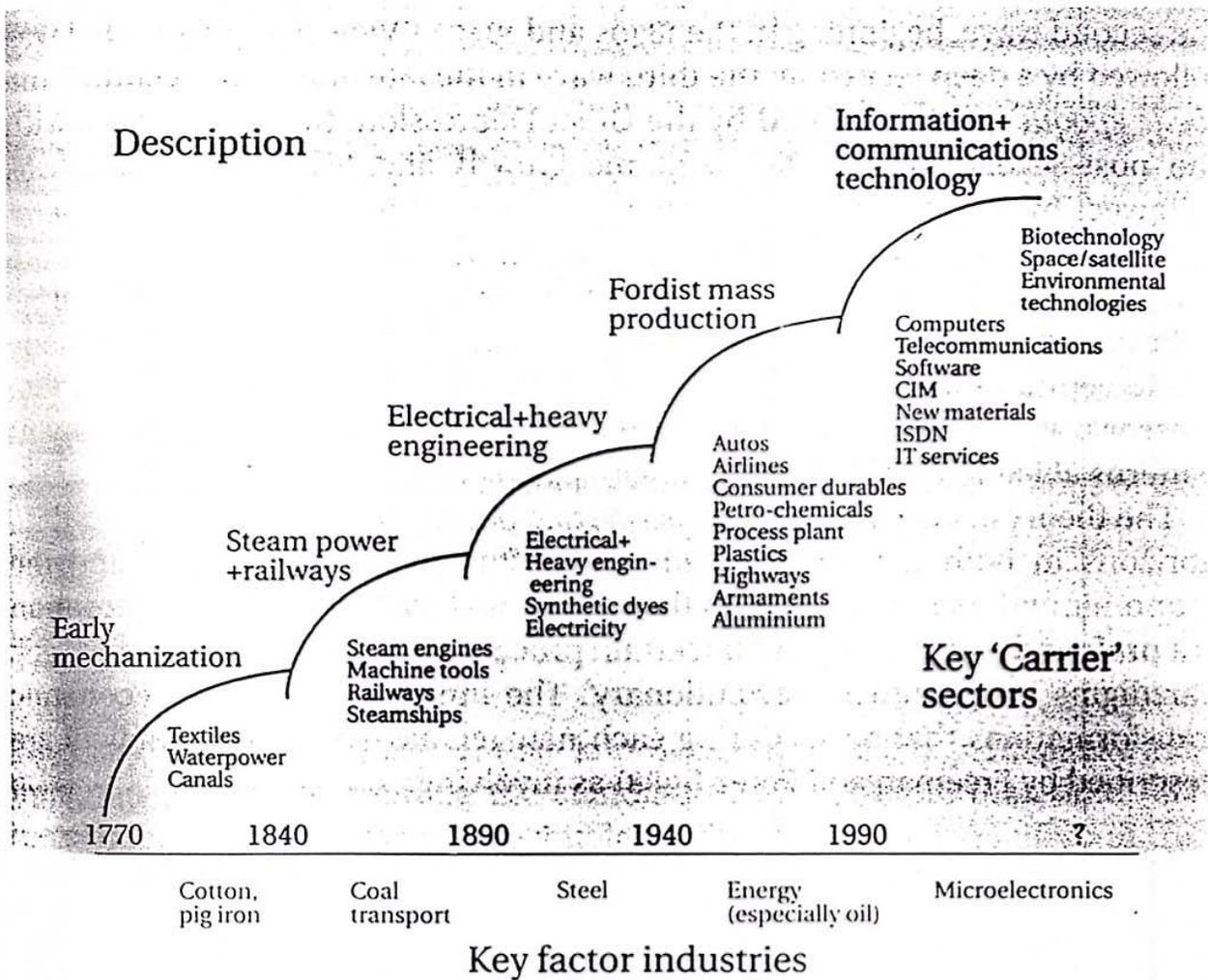


**CAPÍTULO 2**

**PADRÕES DE  
MUDANÇA NAS  
TECNOLOGIAS E NOS  
MERCADOS**

## **2.1. A CURVA S: EVOLUÇÃO E ADOPÇÃO DE TECNOLOGIAS**



Waves of technological development, 1770–1990

Fonte: Dodgson (2000)

**Box 2.1. Major features of industry, 1950s–1990s**

1950s and 1960s  
'Convergence & aggregation'  
(the 4th wave?)

Dominance of large-scale, vertically integrated firms

Mass production systems, dedicated machinery

Mass, stable, standardized markets

Centralized management

Monopoly and oligopoly

Strongly directive government, state-owned utilities and telecoms, protectionist industry policies, tri-partisanship between government, unions and employers

Strong role of trade unions: from policy-making to demarcation decisions

Separation of management and ownership

Full-time secure employment

Some internationalization of industrial production

Nationalism in trade and industry policies

Predominance of Western models of management

Science and research undertaken in universities and large firms

Technology development a feature of individual firms; not-invented-here syndrome; anti-trust legislation

Clear distinction between manufacturing, services, and resources sectors

Competitiveness derived from tangible assets: capital, land, and labour

1990s onwards  
'Divergence & disaggregation'  
(the 5th wave?)

Decentralized, network-based, flexible firms

Lean production systems, flexible machinery

Niche, rapidly changing markets, customer sovereignty

Decentralized management

Intense competition

Non-interventionism, privatization and deregulation, government as regulator not provider, free-trade policies

Declining power of unions, employers' concern for 'employees', multiskilling

Share-owning incentives and management buy-outs

Significant part-time, contractual employment

Globalization of business

Pan-nationalism in trade and industry (EU, NAFTA, APEC)

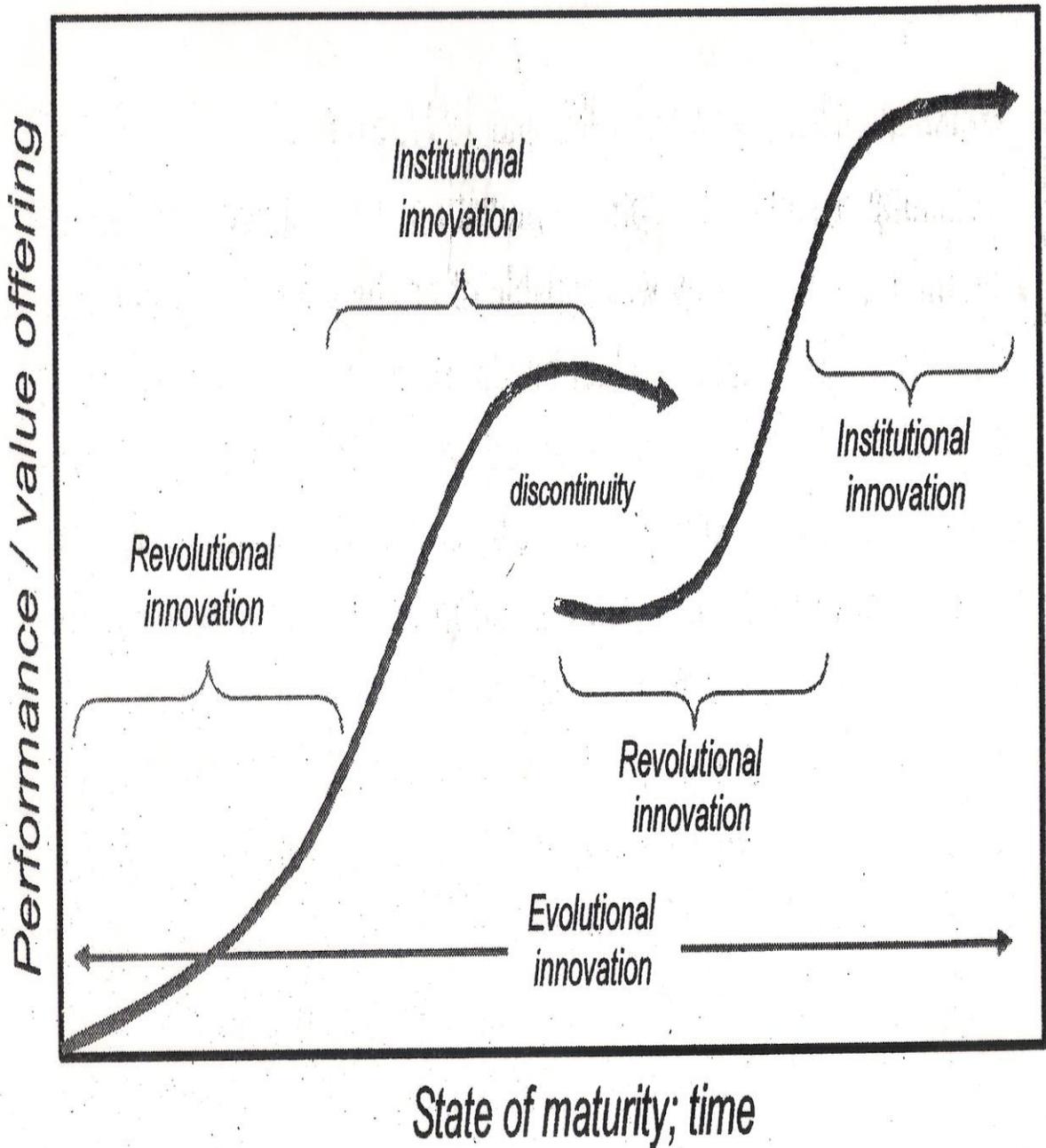
Integration of international best practice in models of management

Substantial increase in scale and scope of science and research and diversity in provision ('the new production of knowledge')

Technological collaboration a feature of government policies and corporate strategies

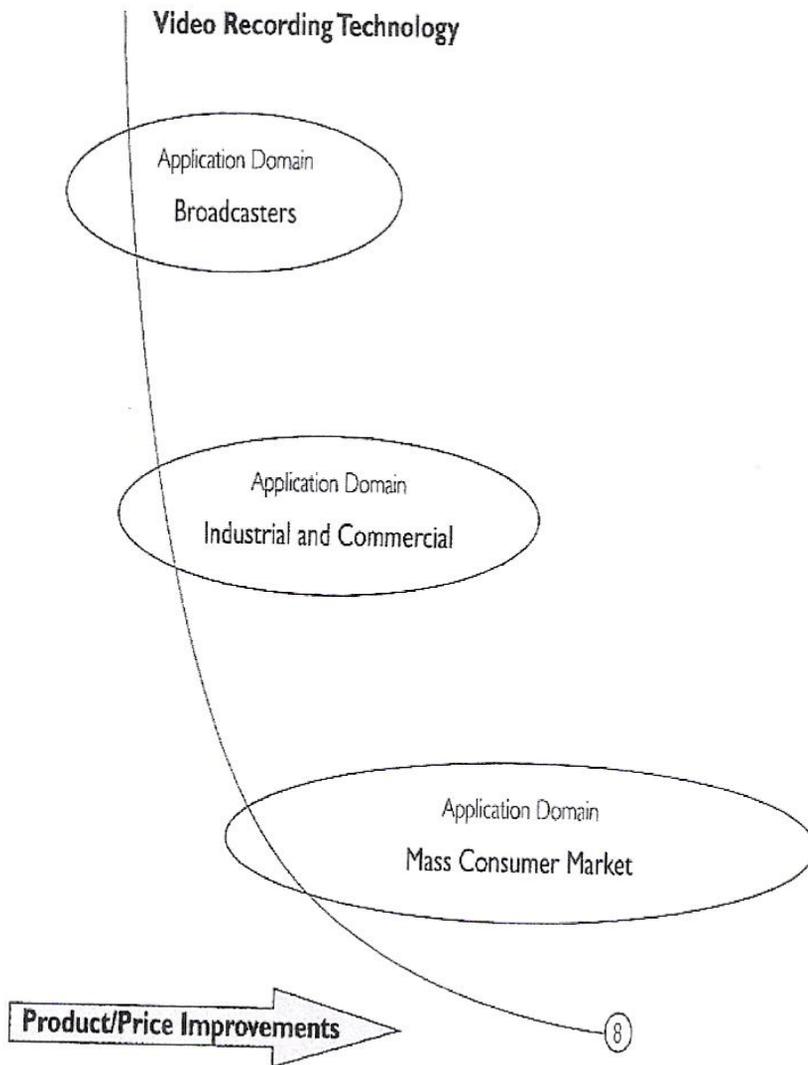
Blurred boundaries in the knowledge economy

Competitiveness derived from intangible assets: skills, capabilities, creativity.



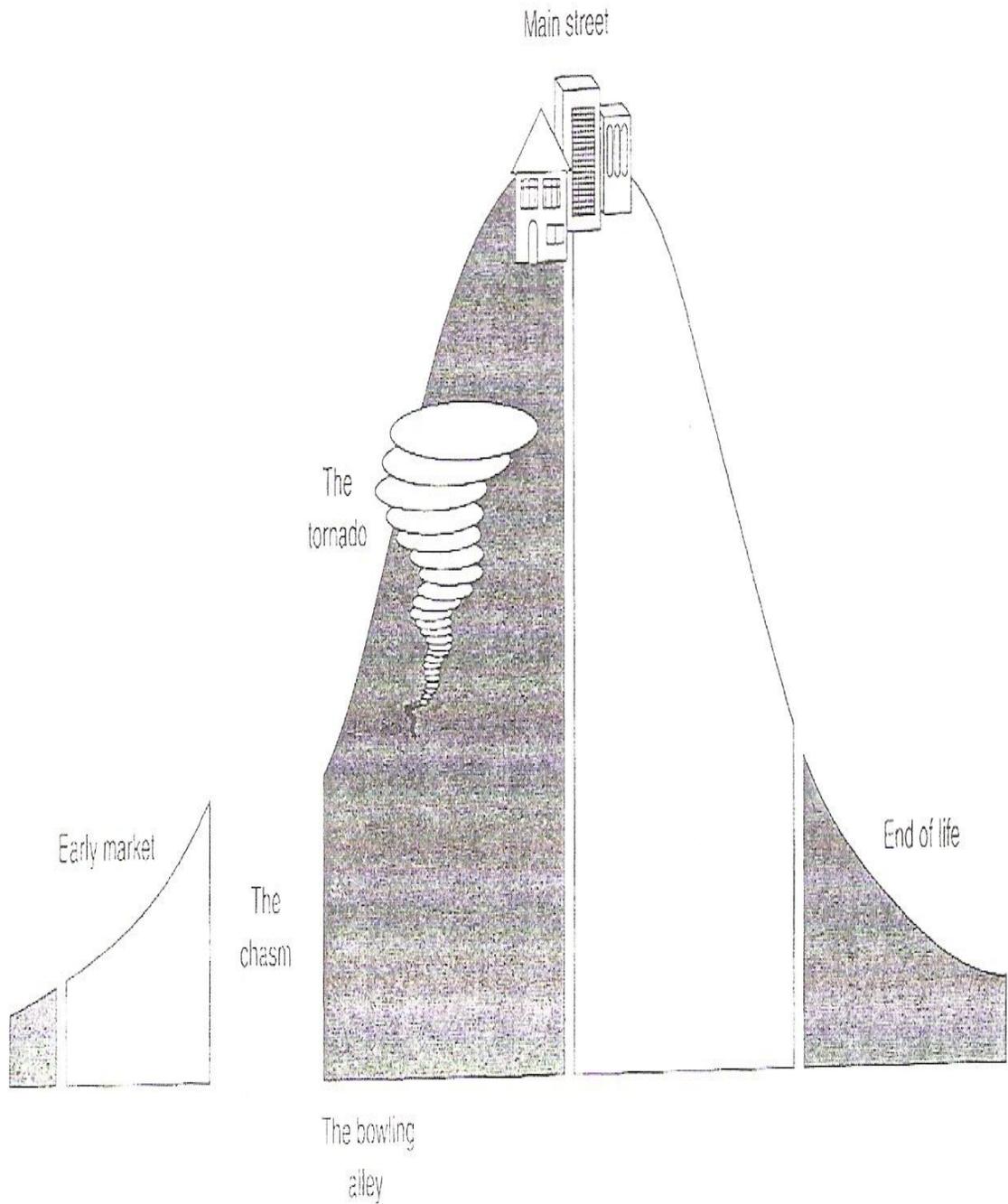
**Figure 6.3** Innovation cycles and management implications for their strategic management

**FIGURE 3.** Technology Evolution and Penetration of Application Domains by Video Recorders



Fonte: Ron Adner e Daniel Levinthal (2003), 'The emergence of emerging technologies', California Management Review, Vol. 45, n.º1, pp. 50-66.

# EXHIBIT 4 The Landscape of the Technology Adoption Life Cycle.



**Fonte:** Moore (2000)

## **2.2. TRAJECTÓRIAS TECNOLÓGICAS**

# TRAJECTÓRIAS TECNOLÓGICAS

TRAJECTÓRIA TECNOLÓGICA é “a actividade de progresso tecnológico através dos trade-offs económicos e tecnológicos definidos por um paradigma\*” (Dosi e Orsenigo, 1988)

As trajectórias tecnológicas definem caminhos possíveis de evolução tecnológica

As estratégias de inovação empresarial são condicionadas pelos caminhos percorridos, nomeadamente em resultado de 2 tipos de restrições:

- Estado actual do conhecimento tecnológico
- Competências acumuladas (Base de Conhecimentos)

\*Um paradigma tecnológico incorpora um conjunto de propriedades técnicas, heurísticas de solução de problemas e experiência acumulada. Cada paradigma envolve uma definição dos problemas a abordar, das tarefas a desempenhar, do padrão de investigação, da tecnologia material a ser utilizada, e dos tipos de artefactos básicos a serem desenvolvidos e melhorados (Dosi e Orsenigo, 1988: 16)

**Table 5.1** Five major technological trajectories

	<b>Supplier-dominated</b>	<b>Scale-intensive</b>	<b>Information-intensive</b>	<b>Science-based</b>	<b>Specialized suppliers</b>
Typical core sectors	Agriculture Services Traditional manufacture	Bulk materials Automobiles Civil Engineering	Finance Retailing Publishing Travel	Electronics Chemicals	Machinery Instruments Software
Main sources of technology	Suppliers Production learning	Production engineering Production learning Design offices Specialised suppliers	Software and systems departments Specialised suppliers	R&D Basic research	Design Advanced users
Main tasks of technology strategy	Use technology from elsewhere to strengthen other competitive advantages	Incremental integration of changes in complex systems Diffusion of best design and production practice	Design and operation of complex information processing systems Development of related products	Exploit basic science Development of related products Obtain complementary assets Redraw divisional boundaries	Monitor advanced user needs Integrate new technology incrementally

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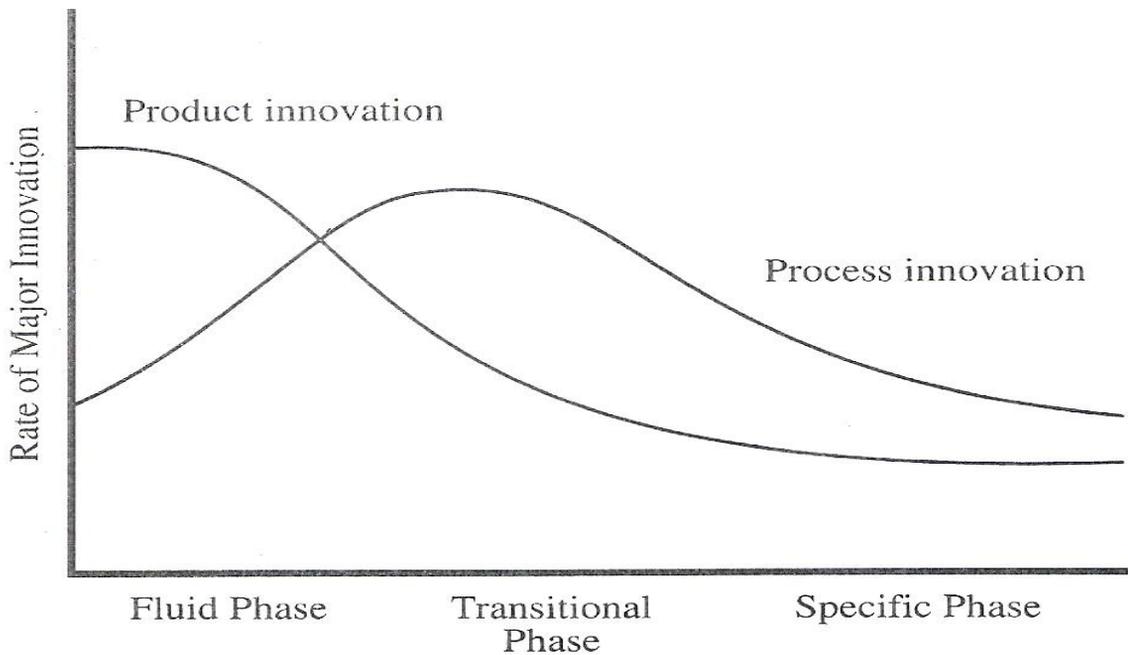
## **2.3. DESCONTINUIDADES TECNOLÓGICAS:**

**DOS NOVOS  
PARADIGMAS ÀS  
CONCEPÇÕES  
DOMINANTES E ÀS  
PLATAFORMAS**

FIGURE 8-2. Waves of Innovation and Change

Industry	Waves of Innovation
Typewriters	<ul style="list-style-type: none"><li>• manual</li><li>• electric</li><li>• word processors</li><li>• personal computers with word-processing software</li></ul>
Ice and refrigeration	<ul style="list-style-type: none"><li>• harvested ice</li><li>• machine-made ice</li><li>• electromechanical refrigeration</li><li>• aseptic packaging</li></ul>
Lighting	<ul style="list-style-type: none"><li>• candles and oil lamps</li><li>• distilled gas</li><li>• incandescent electric lamps</li><li>• fluorescent lamps</li></ul>
Plate glassmaking	<ul style="list-style-type: none"><li>• crown glass</li><li>• cast glass</li><li>• float glass</li></ul>
Photography	<ul style="list-style-type: none"><li>• daguerrotype</li><li>• tin type</li><li>• glass plates</li><li>• dry plates</li><li>• celluloid roll film</li><li>• electronic imaging</li></ul>

FIGURE 4-3. The Dynamics of Innovation

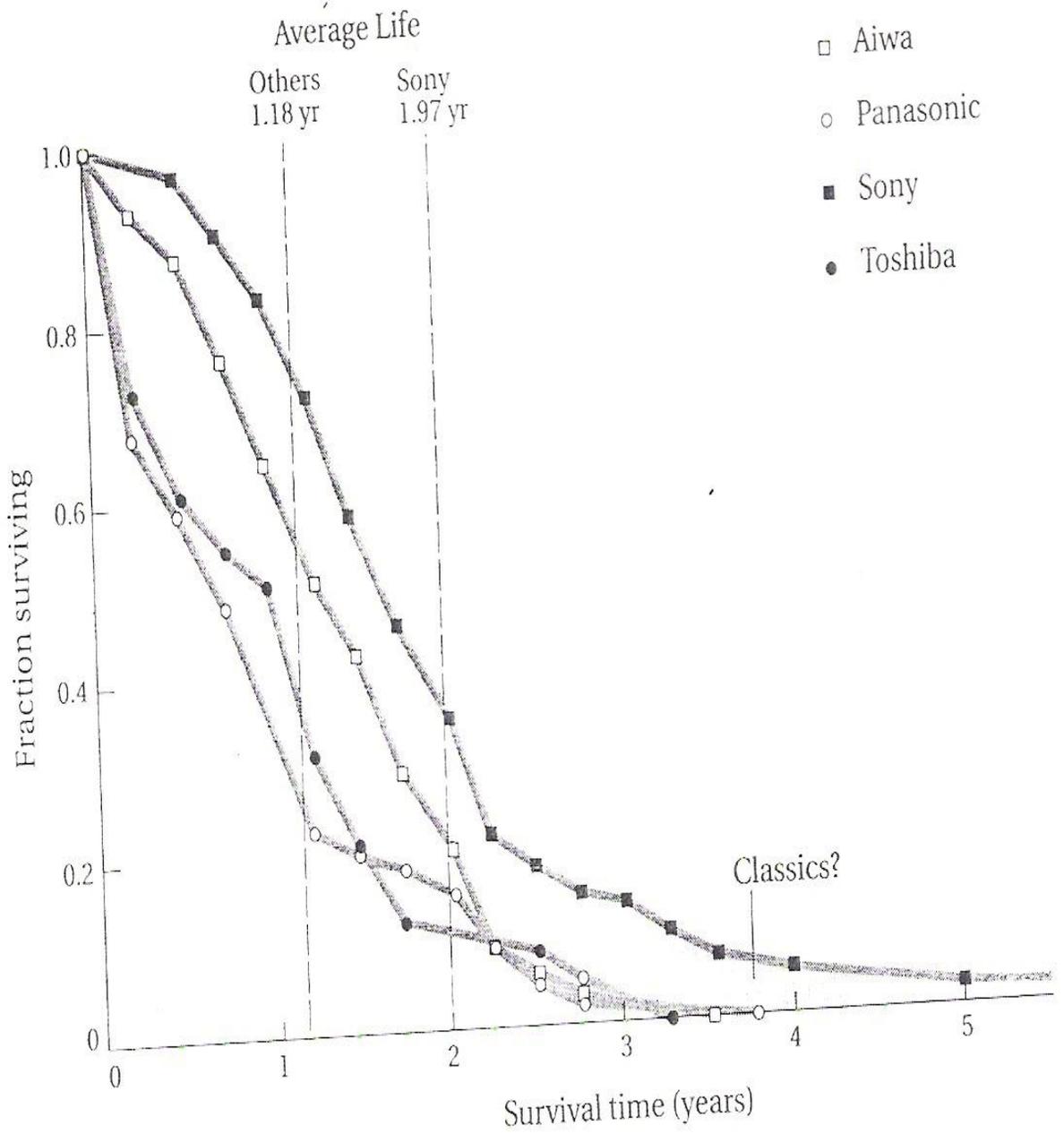


Product	From high variety, to dominant design, to incremental innovation on standardized products
Process	Manufacturing progresses from heavy reliance on skilled labor and general-purpose equipment to specialized equipment tended by low-skilled labor
Organization	From entrepreneurial <i>organic</i> firm to hierarchical <i>mechanistic</i> firm with defined tasks and procedures and few rewards for radical innovation
Market	From fragmented and unstable with diverse products and rapid feedback to commodity-like with largely undifferentiated products
Competition	From many small firms with unique products to an oligopoly of firms with similar products

FIGURE 4-4. Significant Characteristics in the Three Phases of Industrial Innovation

	Fluid phase
Innovation	Frequent major product changes
Source of innovation	Industry pioneers; product users
Products	Diverse designs, often customized
Production processes	Flexible and inefficient, major changes easily accommodated
R&D	Focus unspecified because of high degree of technical uncertainty
Equipment	General-purpose, requiring skilled labor
Plant	Small-scale, located near user or source of innovation
Cost of process change	Low
Competitors	Few, but growing in numbers with widely fluctuating market shares
Basis of competition	Functional product performance
Organizational control	Informal and entrepreneurial
Vulnerabilities of industry leaders	To imitators, and patent challenges; to successful product breakthroughs

Transitional phase	Specific phase
Major process changes required by rising demand	Incremental for product and with cumulative improvements in productivity and quality
Manufacturers; users	Often suppliers
At least one product design, stable enough to have significant production volume	Mostly undifferentiated, standard products
Becoming more rigid, with changes occurring in major steps	Efficient, capital intensive, and rigid; cost of change high
Focus on specific product features once dominant design emerges	Focus on incremental product technologies; emphasis on process technology
Some subprocesses automated, creating islands of automation	Special-purpose, mostly automatic, with labor focused on tending and monitoring equipment
General-purpose with specialized sections	Large-scale, highly specific to particular products
Moderate	High
Many, but declining in numbers after emergence of dominant design	Few; classic oligopoly with stable market shares
Product variation; fitness for use	Price
Through project and task groups	Structure, rules, and goals
To more efficient and higher-quality producers	To technological innovations that present superior product substitutes



**FIGURE 9-3. Competence-Destroying Product and Process Discontinuities**

<p><b>Assembled/ Substitutes</b>            Photolithographic aligners (A)            Radial tires (A)            Diesel locomotive (A)            Ballpoint pen (A)            Jet aircraft engine (A)            Refrigerators (A)            Incandescent lamps (A)            All-steel automobile (A)</p>	<p><b>Assembled/ Market Broadening</b>            Solid-state minicomputers (N)            Integrated circuits minis (A)            Transistor (A)            Electronic calculator (A)            Tufted carpet (A)            Massively parallel supercomputers (A)</p>
<p><b>Nonassembled/ Substitutes</b>            Suspended preheating (D)            Glass drawing (D)            Continuous forming (D)            Float glass process (D)            Basic oxygen steel (A)            Direct reduction of iron (A)            Optical fibers (A)</p>	<p><b>Nonassembled/ Broadening</b>            Rotary kiln (A)            Container machine (N)            Owens process (A)            Vinyl (E)            Celluloid film (A)            Manufactured ice (A)            Synthetic gems (A)            Small liquid oxygen plants (A)</p>

(A) denotes an innovation originated predominantly from a new entrant or attacker; (D) denotes an innovation originated predominantly from an established firm or defender; (N) denotes that the origin of the innovation has not been classified, mainly cases in which no prior industry existed.

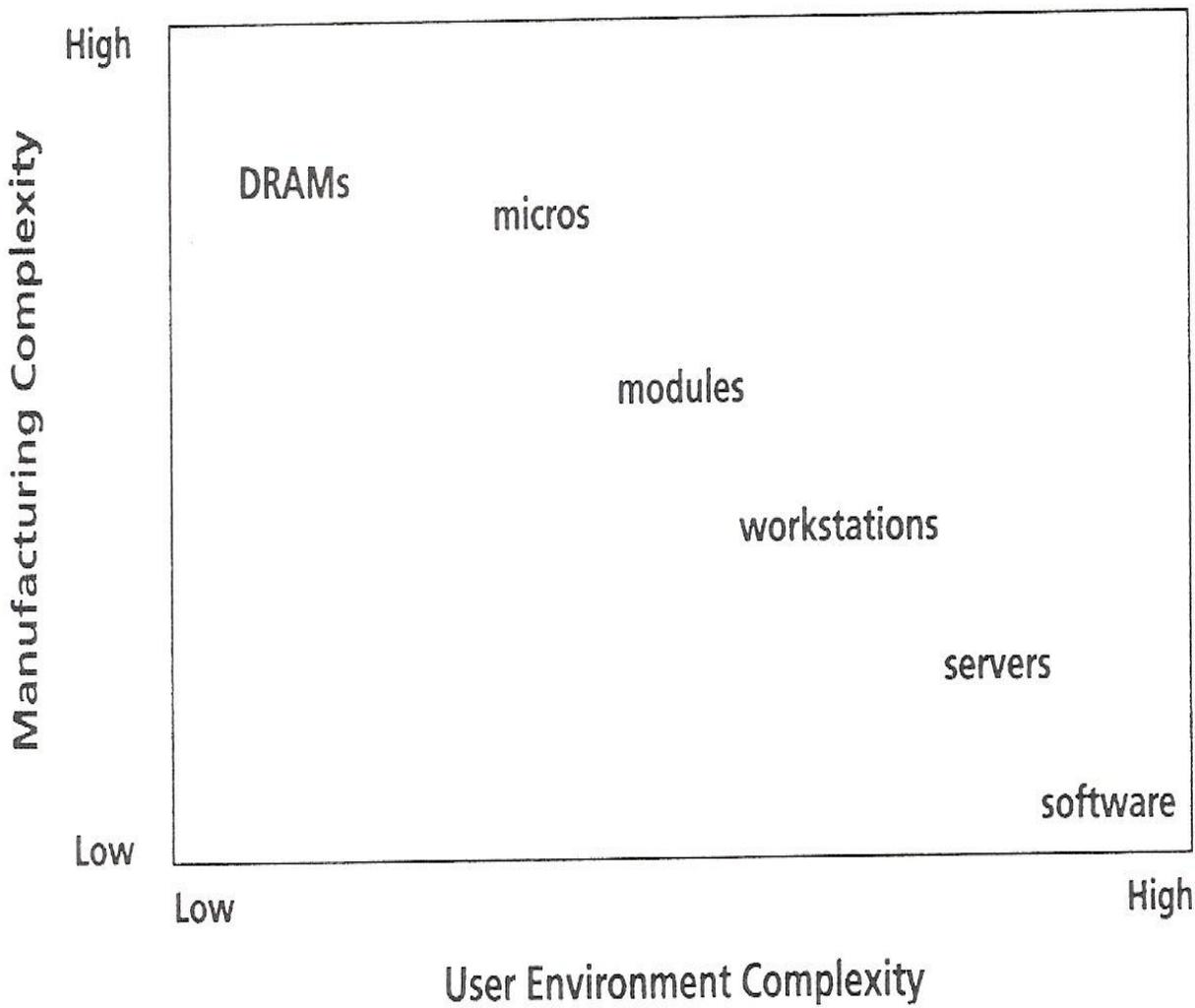
FIGURE 9-4. Competence-Enhancing Product and Process Discontinuities

<p><b>Assembled/ Substitutes</b>            Nuclear steam supply (A)            Air-cooled engines (D)            Nylon tire cord (N)            Hydrogen-cooled generator (D)            Fluorescent lamps (N)</p>	<p><b>Assembled/ Market Broadening</b>            Semiconductor memory (D)            Electric typewriter (A)</p>
<p><b>Nonassembled/ Substitutes</b>            Computerized kiln (D)            Edison long kiln (D)            Machine cylinder glass (D)            Gob-fed bottle machine (D)            Double gob machine (D)            Continuous casting (D)            Continuous drawn copper (D)            Oriented strand board (D)</p>	<p><b>Nonassembled/ Broadening</b>            Integrated circuits (A)            Continuous vertical kiln (A)</p>

(A) denotes an innovation originated predominantly from a new entrant or attacker;  
 (D) denotes an innovation originated predominantly from an established firm or defender;  
 (N) denotes that the origin of the innovation has not been classified, mainly cases in which no prior industry existed.

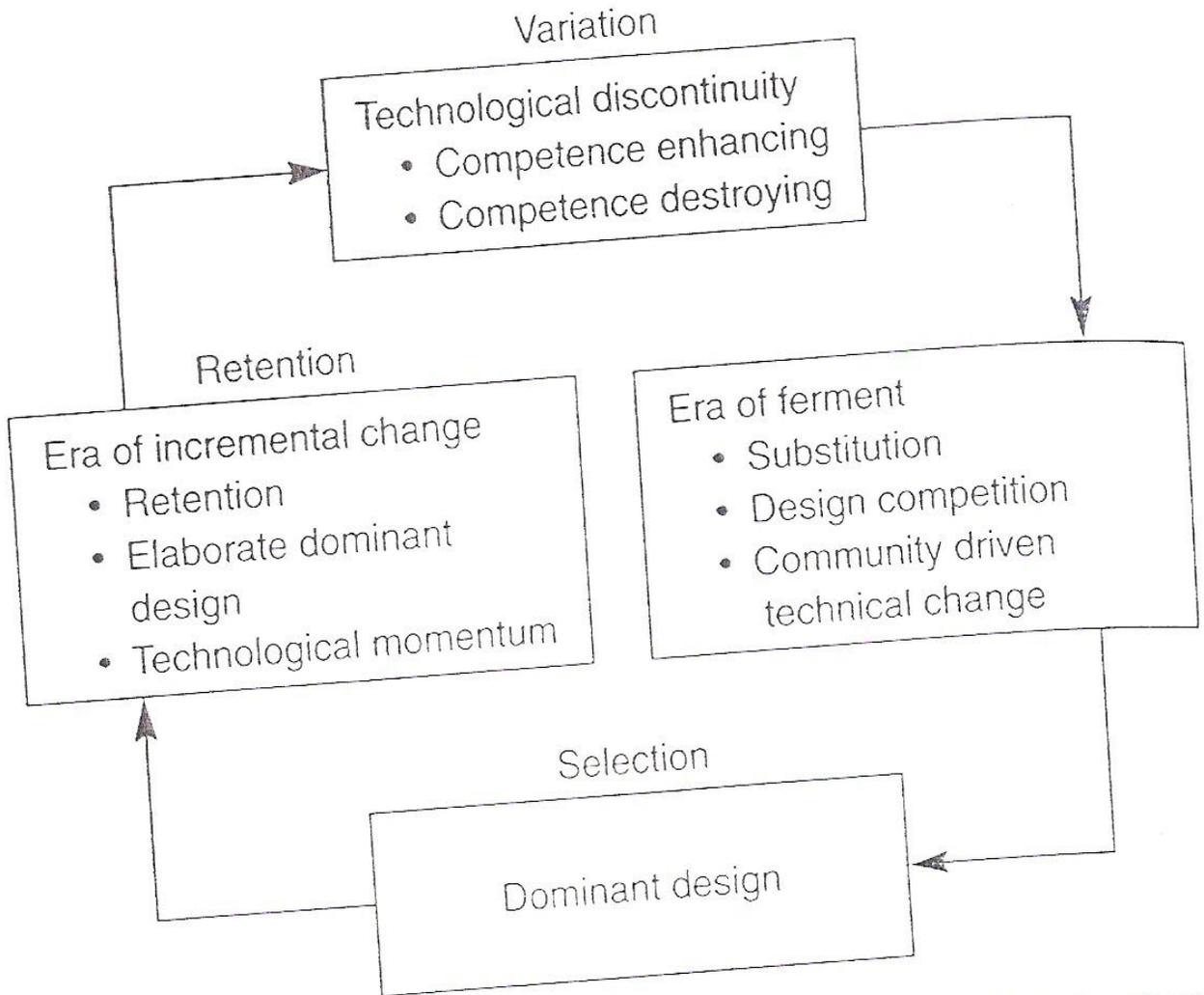
**FIGURE 3-3**

### Sources of Complexity in the Empirical Environments



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# EXHIBIT 1 A Technology Cycle



# PLATAFORMAS:

## ❖ A PLATAFORMA

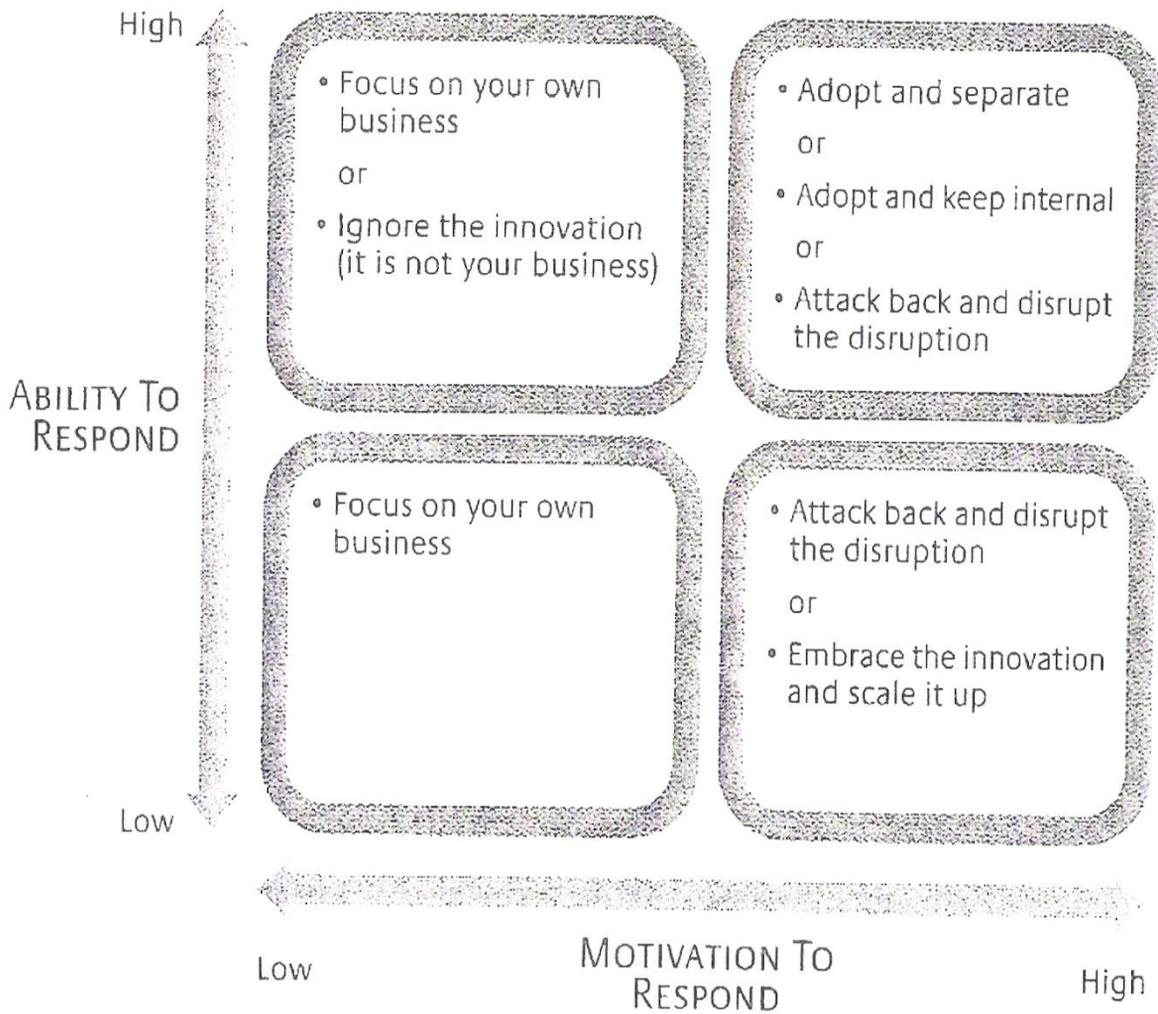
como base orientadora do desenvolvimento de novas aplicações/modelos e como base de redução de custos de produção

## ❖ PLATAFORMAS E DESENHOS ROBUSTOS

Exemplos

SONY: 200 modelos diferentes do Walkman baseados em 3 plataformas

INDÚSTRIA AUTOMÓVEL: A plataforma como base de concepção e produção de diversos modelos



Fonte: Constantinos Charitou e Constantinos Markides (2003), 'Response to disruptive strategic innovation', Sloan Management Review, Winter, p. 55-63

## **2.4. AS BATALHAS PELA DOMINÂNCIA TECNOLÓGICA**

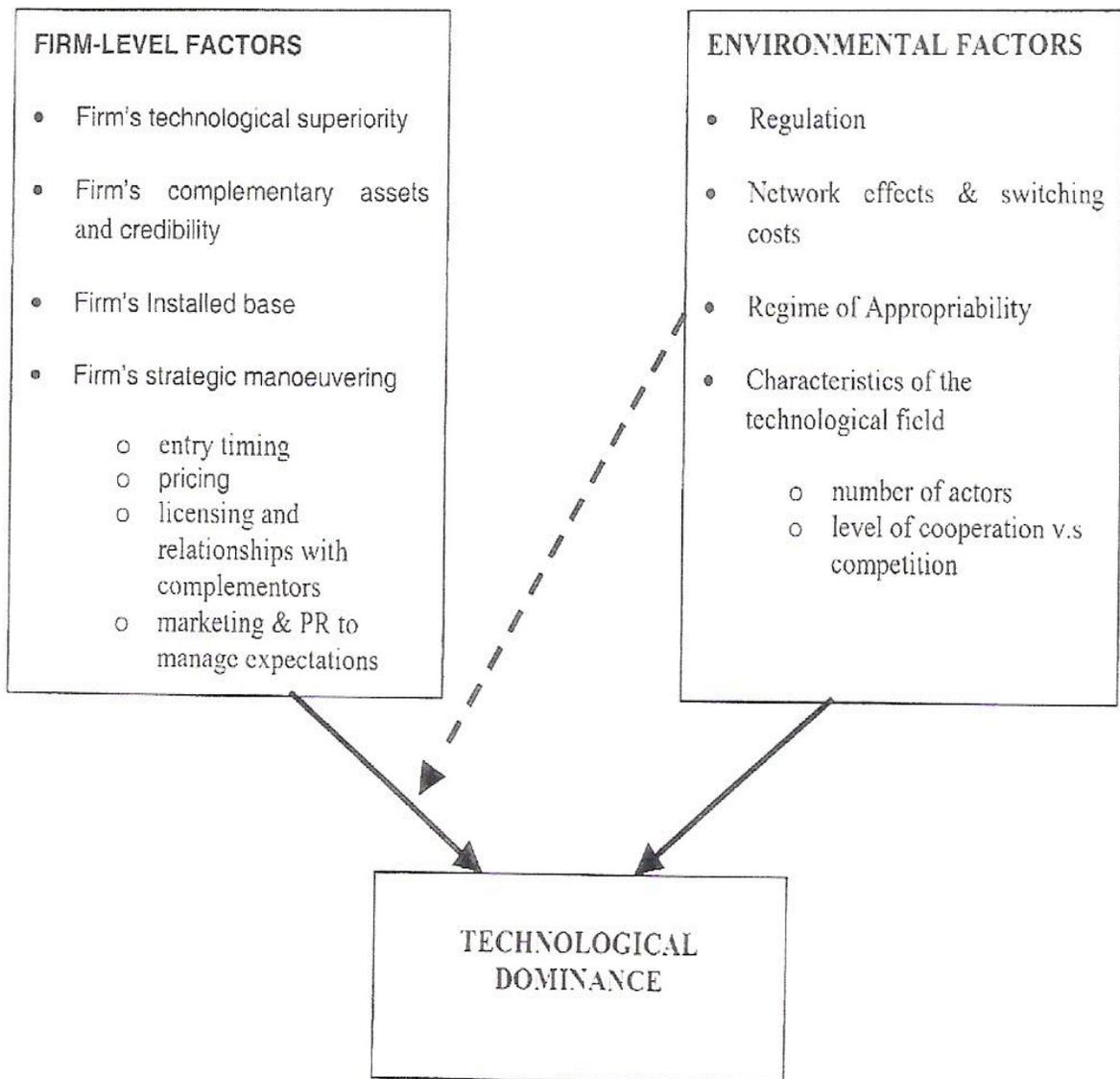
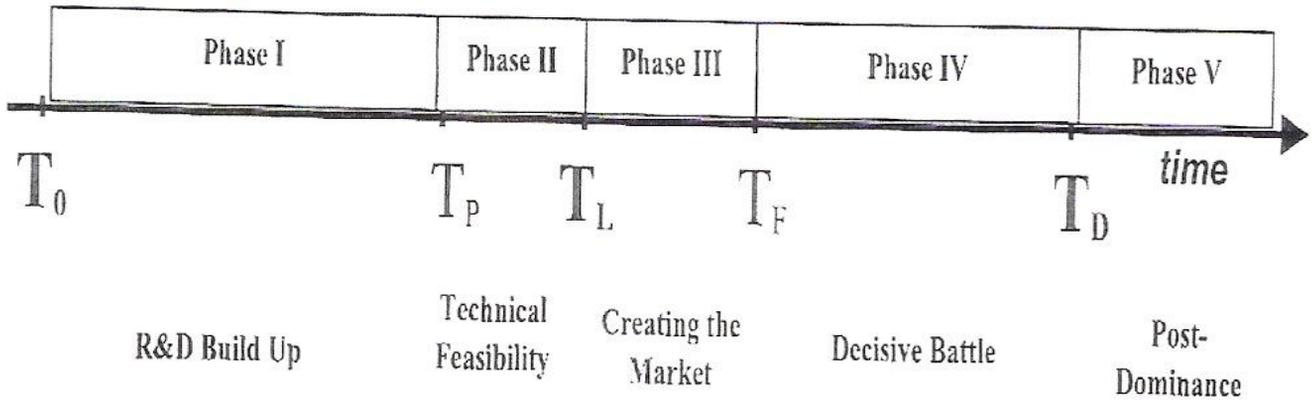


Fig. 1. Firm- and environment-level factors influencing the outcome of technology battles.

**Fonte:** Fernando Suarez (2004), 'Battles for technological dominance: an integrative framework', *Research Policy*, Vol. 33, pp. 271-286



Factor Type	Dominance Factor	Phase I	Phase II	Phase III	Phase IV	Phase V
Firm-level	Technological superiority		***			
	Credibility/complementary Assets	***			***	
	Installed base				***	***
	Strategic manoeuvring			***		
Environmental level	Regulation		***			
	Network effects and switching costs				***	***
	Regime of Appropriability	***				
	Characteristics of the technological field	***				

Fig. 3. Key factors of success at each stage of the dominance process.

**Fonte:** Fernando Suarez (2004), 'Battles for technological dominance: an integrative framework', *Research Policy*, Vol. 33, pp. 271-286

# **O CASO KODAK**

# O CASO KODAK

(22 Fev 2012)

- Quais as razões que estiveram na base da ascensão da Kodak?
- Quais os factores que conduziram à sua queda?
- Como podemos interpretar o declínio da Kodak com base no que estudámos neste Capítulo?