UNIVERSIDADE CATÓLICA PORTUGUESA

# INTERNATIONALISATION PROCESS OF PORTUGUESE COMPANIES IN THE FASHION SECTOR IN THE UNITED KINGDOM

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# INTERNATIONALISATION PROCESS OF PORTUGUESE COMPANIES IN THE FASHION SECTOR IN THE UNITED KINGDOM

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by

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*"Para ser grande, sê inteiro: nada*
*Teu exagera ou exclui.*
*Sê todo em cada coisa. Põe quanto és*
*No mínimo que fazes.*
*Assim em cada lago a lua toda*
*Brilha, porque alta vive"*

*Ricardo Reis*

# Resumo

O trabalho a seguir apresentado tem como principal objetivo estudar o processo de internacionalização de empresas portuguesas no setor da moda no Reino Unido. Depois de uma revisão de literatura sobre a internacionalização das empresas e uma caraterização deste setor em Portugal, são apresentados e analisados quatro casos de estudo de empresas portuguesas deste setor e exportadoras para o mercado britânico, mais concretamente a A. Ferreira e Filhos, SA, a Tri-wool, SA, a Coisas do Algodão SA e a marca Lemon Jelly. Estes estudos de caso foram construídos com base em entrevistas com gestores de topo destas empresas que seguiram um guião previamente elaborado para o efeito. Com estas entrevistas procurou-se obter informação de caracterização das empresas, do seu processo de internacionalização, especificando o caso do mercado do Reino Unido, das dificuldades que possam ter tido e do papel da AICEP nesse processo.

Com base na análise destes quatro casos de estudo foi possível concluir que todas as empresas consideram os mercados internacionais obrigatórios para que as empresas tenham sucesso na medida em que, o mercado doméstico é bastante pequeno. No que diz respeito ao mercado britânico, no início da exportação das várias empresas, estas não encontraram barreiras difíceis à entrada. Porém desde a entrada em vigor do Brexit que têm mais desafios para levar as suas mercadorias para este mercado, nomeadamente devido aos custos do transporte e dos processos alfandegários.

Tal como decorre da revisão de literatura, nestes estudos de caso foi possível evidenciar a importância para o sucesso da internacionalização de fatores como a boa reputação da marca própria das empresas, o aproveitamento das possibilidades de integração em cadeias de produção internacionais e a capacidade de adaptação às necessidades dos clientes nos mercados estrangeiros, sem esquecer algum recurso a novas tecnologias de comercialização como o comércio eletrónico.

Como a internacionalização é vista como fundamental para as empresas do setor da moda, e tendo em conta que se trata de uma indústria tida em boa consideração pelos mercados de exportação, são algumas as organizações que apoiam as empresas portuguesas no processo de internacionalização, como é o caso da AICEP. Nas entrevistas realizadas pode compreender-se que esta organização é considerada uma ajuda importante, maioritariamente para empresas mais pequenas que estejam a iniciar este processo e por isso necessitem de mais informações.

Palavras-chave: AICEP, Empresas Portuguesas, Indústria da Moda, Processo de internacionalização, Reino Unido

Número de Palavras: 7855

# Abstract

The main objective of this work is to study the process of internationalisation of Portuguese companies in the fashion sector in the United Kingdom. After a literature review on the internationalisation of companies and a characterisation of this sector in Portugal, four case studies of Portuguese companies in this sector and exporting to the British market are presented and analysed, namely A. Ferreira e Filhos, SA, Tri-wool, SA, Coisas do Algodão, SA and the brand Lemon Jelly. These case studies were built on the basis of interviews with top managers of these companies following a script prepared beforehand for this purpose. With these interviews we sought to obtain information on the characterisation of companies, their internationalisation process, specifying the case of the UK market, the difficulties they may have had and the role of AICEP in this process.

Based on the analysis of these four case studies, it was possible to conclude that all companies consider international markets mandatory for their success as the domestic market is quite small. As far as the British market is concerned, when the various companies started exporting, they did not encounter difficult barriers to entry. However, since the entry into force of Brexit, they have more challenges to take their goods to this market, namely due to the costs of transportation and customs processes.

As can be seen from the literature review, in these case studies it was possible to highlight the importance for the success of the internationalisation of factors such as the good reputation of the companies' own brand, the use of the possibilities of integration in international supply chains and the ability to adapt to the needs of customers in foreign markets, without forgetting some use of new marketing technologies such as e-commerce.

As internationalisation is seen as fundamental for companies in the fashion sector and taking into account that it is an industry held in high regard by export markets, there are some organisations that support Portuguese companies in the internationalisation process, such as the case of AICEP. In the interviews carried out, it can be understood that this organisation is considered an important help, mainly for smaller companies that are starting this process and therefore need more information.

Keywords: AICEP, Portuguese Companies, Fashion Industry, Internationalisation Process, United Kingdom

Number of words: 7855

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# Introduction

The present Master's Thesis, developed in the context of the Master's in Marketing, was carried out in an organisational context. The internship took place at the AICEP Office in London, but, due to the current pandemic situation, it was conducted remotely, for a period of 6 months. The object of this work is to study the internationalisation process of Portuguese fashion companies in the United Kingdom.

The fashion industry is currently one of the most important sector of the Portuguese economy, corresponding to 10% of the total exports (ATP-Associação Têxtil e Vestuário de Portugal, n.d.). After a troubled period, due to the Covid 19 pandemic, the sector has been improving considerably, with 5.4 billion euros of exports in 2021, an increase of 4% compared to 2019, a year that had been a record for this industry (AICEP, 2022). One of the main export markets of the Portuguese textile-fashion sector is the UK. It is the sixth largest world economy and the second at the European level. In the British household budget, clothing consumption represents 4.5%, and the textiles and clothing that consumer buy most on the high street, 90% is imported (Portugal Têxtil, 2021) .

During the internship I participated in meetings with companies that intended to start exporting to the British market and asked AICEP to help them in this process in different aspects, such as the identification of possible local business partners and support in the preparation and implementation of business programs and investments in this market

As for my Master's Thesis I had the possibility to choose the theme I wanted to address in my dissertation. When I was assessing the different possibilities that

I could study, I had a meeting with AICEP's London team in July 2021 to know which sectors they most address in their work, and consulting with my thesis's advisor, I proposed that I would study the internationalisation of the Portuguese fashion companies in the UK market addressing the following research questions:

RQ1: How can an organisation such as AICEP help the internationalisation process of Portuguese fashion companies?

RQ2: Is the UK market a business opportunity for Portuguese companies in the fashion industry?

RQ3: What motivates Portuguese companies in the fashion industry to go to the British market?

RQ4: What are the difficulties that Portuguese companies in the fashion industry find when entering the British market?

The work is divided in 5 parts:

- literature review covering the internationalisation process in general and the online internationalisation (e-commerce);
- characterisation of the fashion industry in Portugal and some possible consequences of the Brexit for companies that intend to or are already in the process of internationalising to the UK;
- methodology based on case studies, how they were selected and the questionnaire that was used to collect data for these case studies;
- presentation and analysis of the data collected in the case studies;
- conclusions that can be drawn from this analysis, its shortcomings and suggestions for future research.

# Chapter 1
# Literature Review

## 1. Literature review about internationalisation

### 1.1 Internationalisation

There is a vast literature about the importance of internationalisation for the economic success of business organisations (Azevedo Lobo *et al.*, 2017). More and more companies are aware that the domestic market is not enough for their survival and exporting is a necessary strategy for that (Couto & Ferreira, 2017).

Nowadays, internationalisation is not considered to be such a difficult process compared to the past. The tendency of economic globalisation is increasing with the elimination of trade barriers and technological improvements facilitating international exchanges. All these changes have resulted in increased competition in the domestic market (Couto & Ferreira, 2017).

When firms study the possibility of internationalisation, they have to be conscious of the risks they have to face in this process. Concerning small and medium-sized enterprises (SMEs), risk is higher because they tend to have less information about foreign markets, and insufficient financial and human resources for their foreign trade (Serra *et al.*, 2012).

According to Doyle, the brand has an enormous importance, as it is allows the differentiation between companies in relation to the products they present (Doyle, 1989). An additional extremely important factor for the brand to assert itself in foreign markets is the quality of the product, as well as the fact that it is a unique product in the market and also the strength of the product (Serra *et al.*, 2012). Therefore, market orientation is a factor that can be important for firms to succeed in foreign markets.

Market orientation can be described as the collection of relevant information about various market constituents including competitors and customers. With this information firms can explore different ways to satisfy the customers' needs (Fernandes *et al.*, 2020; Kohli & Jaworski, 1990). For this reason, one of the export marketing *strategies* which firms should take into consideration is the product adaptation. Firms that take this adaptation into account in their strategy have a higher propensity to export (Serra *et al.*, 2012).

The literature on this topic identified a relationship between market orientation and the firms' performance. This is due to the fact that through market orientation there is an innovation at organisational level which will result in an increase in business performance (Maçães *et al.*,2007). With market orientation there is a constant search for the market needs as well as the use of the knowledge already existing in the firm in order to innovate not only the organisation itself, but also the performance of the product (Fernandes et al., 2020).

In an international context this kind of strategy is especially relevant because the foreign markets have a complexity that is different from the domestic market. These differences exist in the technological, economic, political, cultural and social dimensions (Fernandes *et al.*, 2020). Technology plays a decisive role in the propensity to export in firms from various sectors. However, there are some research concluding that the greater the technological orientation, the lower the level of adaptation on the part of firms, due to the position of the product in the market and also in the way export promotion is done (Serra *et al.*, 2012).

Because of the economic globalisation and the deregulation that has been happening in the textile industry, the way firms compete in this market has changed a lot (de Jorge Moreno & Carrasco, 2016). The ability to expand into worldwide markets and compete for new customers, the adoption of new technology and new organisational structures (particularly related to the supply chain) and the hunt for new suppliers provide significant opportunities for corporate expansion. Since the removal of barriers to trade on textiles and clothing in January 2005, a new scenario has emerged, providing opportunities for major exporters such as China and India to significantly increase their market share while also posing challenges for European Union member states to remain competitive (de Jorge Moreno & Carrasc*o*, 2016).

The fashion business is an excellent illustration of globalisation. This sector has evolved considerably in the last 20 years. One of the major changes is the introduction of fast fashion which focuses on providing the latest items swiftly and efficiently at a low price (de Jorge Moreno & Carrasco, 2016; Sheridan *et al.*, 2006).

## 1.2 E-commerce and online internationalisation

In our society, the overly occupied routine of the consumers, allied more recently with the pandemic situation, have led more and more firms to invest in online shopping instead of physical retail. Consumers have less free time. So they rely on the convenience of online shopping for getting information ("search convenience") and getting it more easily and faster ("access convenience") (Duarte *et al.*, 2018). This facilitates "transaction convenience", that is, the speed and ease with which transactions can made.

Other types of conveniences involved in market transactions are the following (Duarte *et al.*, 2018):

- evaluation convenience which corresponds to the detailed and easiness to understand product evaluation;

- attentiveness convenience where retailers provide personalized service and attention to consumers;
- possession convenience which includes the efforts with respect to time and money that consumers have to spend to purchase what they want;
- post-possession convenience which arises after the change of service where the consumer equates the time spent as well as the efforts to restart the contact with a firm after the purchase of the desired product.

New selling and communication channels have been made possible by technological innovation, opening up new possibilities for retail firms (Pauwels & Neslin, 2015; Silva *et al.*, 2020).

According to Joines *et al* (2003), factors like interactivity, consumer intimacy and the possibility of buying online, make the internet-based advertising stand out from other advertising channels. Being able to visualize the products and to buy them on the spot, also distinguishes the Web from other advertising media. In addition, people feel safer about their personal data as the transaction systems are already more secure (Joines *et al.*, 2003). Many businesses utilized these new channels in order to attract new clients and improve service quality for existing ones (Silva *et al.*, 2020).

As regards to interactivity, consumers like to be in control. This allows them to have their needs and desires "uncovered, modified and satisfied" by a brand (Joines *et al.*, 2003). Through a more interpersonal communication, it is possible to make advertising more personalized, leading consumers to believe that brands can get to know their consumers in more detail, including their individual behaviours, and can therefore meet more effectively the consumer needs (Joines *et al.*, 2003).

Despite the global economic and financial crises, internet sales of luxury goods have increased in recent years. The link between luxury and e-commerce is elusive from a theoretical standpoint. In general, it is linked to the main difficulty of luxury enterprises, which is expansion, as point out by (Kapferer, 2014). In fact, luxury firms face unique problems as a result of the risk of losing the aura of exclusivity that distinguishes their value propositions. However, as indicated by the same author, the online channel offers tremendous prospects, especially given the consistent growth in luxury product purchases by customers in emerging and developing nations (Simone; & Runfola, 2015).

"The conduct of economic transactions across national boundaries, when the "crossing" of national boundaries takes place in the virtual rather than the actual or spatial realm" is what is called “online internationalisation” (Simone; & Runfola, 2015).

International retailers are increasingly using franchising as a mode of operation in foreign markets (Doherty & Alexander, 2004). Fashion retailers have been characterized as successful internationalists. In terms of the number of retail enterprises operating in foreign markets, the fashion sector is the most internationalised in the UK, accounting for nearly one-third of all international retailers (Doherty & Alexander, 2004). Fashion shops have a higher chance of international success than other retailing sectors because they have low start-up costs, ease of entry and exit in the market compared to manufacturing and often have a focus on a single brand format (Doherty & Alexander, 2004).

One major concern of fashion firms is to handle all touchpoints in a synchronized manner in order to provide customers with a distinctive brand experience (Silva *et al.*, 2020). Research conducted by Silva *et al* (2020) concluded that “low cost, mid-priced and luxury segments” do not have many differences since all use the available channels and have a website with “clear and updated information”.

In general, fashion brands have good integration between their physical channels and websites, with some brands going so far as to extend this integration to their physical stores (Silva *et al.*, 2020) .

# 2. The fashion industry in Portugal

## 2.1 Characteristics of the industry

The textile, clothing and footwear industries are very important in the Portuguese economy. They are among the oldest industries in the country. They have been strengthening their position over the years, creating new jobs requiring diverse skills and increasing its competitive position in a sophisticated market like Europe, where Italy and France are well recognized competitors due to the quality of their products (Marques *et al.*, 2016).

According to recent data of Instituto Nacional de Estatística treated by the association representing these industries (ATP-Associação Têxtil e Vestuário de Portugal, 2021), there are about 6000 firms in the textile and clothing industries representing:

- 10% of the Portuguese total exports;
- 20% of the employment, 9% of the turnover and 9% of the production of the manufacturing industries.

**Table 1** - Economic indicators for the textile and clothing industries

| **Indicators** | **2015** | **2016** | **2017** | **2018** | **2019** | **2020** |
|---|---|---|---|---|---|---|
| Production (millions of €) | 6.767 | 7.147 | 7.425 | 7.638 | 7.487 | 6.176 |
| Turnover (millions €) | 6.942 | 7.363 | 7.597 | 7.800 | 7.701 | 6.597 |
| Exports (millions €) | 4.811 | 5.036 | 5.224 | 5.313 | 5.215 | 4.646 |
| Imports (million €) | 3.835 | 3.940 | 4.148 | 4.338 | 4.443 | 3.796 |
| Employment | 131.513 | 135.521 | 137.017 | 137.989 | 136.336 | 131.539 |

Source: data from INE as treated by ATP - Associação Têxtil e Vestuário de Portugal (2021)

Most of the firms in these industries are labour intensive and are located in the densily populated region of Northwestern Portugal. They are mainly small or medium sized enterprises where most of the production and employment are from those which are in business for 20 years of more.

**Table 2** - Distribution of the number of enterprises, turnover and number of employees by size in the textile and clothing industries in 2020

| | **Microenterprises** | **Small enterprises** | **Medium-sized enterprises** | **Large enterprises** |
|---|---|---|---|---|
| **Number of enterprises** | 61,18% | 30,11% | 8,1% | 0,61% |
| **Turnover** | 6,73% | 26,3% | 48,7% | 18,27% |
| **Number of Employees** | 9,54% | 33,98% | 42,84% | 13,63% |

Source: Banco de Portugal (2021)

**Table 3** - Distribution of the number of enterprises, turnover and number of employees by age of enterprise in the textile and clothing industries in 2020

| | **Up to 5 years** | **6-10 years** | **11-20 years** | **More than 20 years** |
|---|---|---|---|---|
| **Number of enterprises** | 27,25% | 19,24% | 25,66% | 27,85% |
| **Turnover** | 5,93% | 10,14% | 15,84% | 68,09% |
| **Number of Employees** | 10,17% | 13,17% | 20,21% | 56,45% |

Source: Banco de Portugal (2021)

The clothing industry is intimately linked to the fashion industry and to end-user markets. Product design, fashion, distribution, and logistics, as well as branding, are all important aspects of their business' success in foreign markets which are the main destinations of their products (David *et al.*, 2013). Tables 4, 5 and 6 present the recent trends of the products and foreign markets of these industries.

**Table 4** - Exports of the Portuguese textile and clothing industries by types of products

| Value of products (millions €) | 2019 | 2020 | 2021 | Variation 21/20 | Variation 21/19 |
|---|---|---|---|---|---|
| **Textiles (except home textiles)** | 1363 | 1224 | 1410 | 15,2% | 3,4% |
| **Knitted Clothing** | 2143 | 1840 | 2336 | 26,9% | 9,0% |
| **Fabric Clothing** | 985 | 743 | 796 | 7,2% | -19,1% |
| **Home Textiles and other made-up textile articles** | 723 | 846 | 876 | 3,5% | 21,1% |
| **TOTAL** | 5215 | 4653 | 5419 | 16,5% | 3,9% |

Source: Data from INE as treated by ATP (Jornal T, 2022)

**Table 5** - Exports of the Portuguese textile and clothing industries by products

| Value of products (millions €) | 2019 | 2020 | Variation |
|---|---|---|---|
| **Silk** | 0,2 | 0,1 | -50,4% |
| **Wool** | 58,4 | 41,9 | -28,3% |
| **Cotton** | 153,8 | 148,4 | -3,5% |
| **Other Vegetable textile fibres** | 7,8 | 8,3 | 6,6% |
| **Man-made filaments** | 77,2 | 65,9 | -14,6% |
| **Wadding, felt and nonwovens** | 276,4 | 212,8 | -23,0% |
| **Carpets and other floor coverings** | 259,5 | 274,9 | 5,9% |
| **Special woven fabrics** | 80,0 | 60,5 | -24,3% |
| **Impregnated fabrics** | 110,1 | 102,1 | -7,3% |

| | | | |
|---|---|---|---|
| **Knitted or crocheted fabrics** | 287,0 | 258,4 | -10,0% |
| **Knitted or crocheted apparel and accessories** | 132,8 | 117,6 | -11,5% |
| **Woven apparel and accessories** | 2.143,2 | 1.852,6 | -13,6% |
| **Other made up textile articles** | 984,9 | 733,3 | -25,5% |
| **Other made-up textile articles** | 643,3 | 765,9 | 19,1% |
| **Total** | 5.214,6 | 4.642,7 | -11% |

Source: ATP - Associação Têxtil e Vestuário de Portugal (2020)

**Table 6** - Main export markets of the Portuguese textile and clothing industries (millions €)

| Countries | 2019 | 2020 | 2021 | Variation 21/20 | Variation 21/19 | % total in 2021 |
|---|---|---|---|---|---|---|
| **Spain** | 1598 | 1195 | 1377 | 15,2% | -13,8% | 25% |
| **France** | 671 | 716 | 790 | 10,4% | 17,8% | 15% |
| **Germany** | 436 | 449 | 465 | 3,5% | 6,7% | 9% |
| **EUA** | 340 | 333 | 447 | 34,3% | 31,5% | 8% |
| **United Kingdom*** | nd | nd | 387 | nd | nd | 7% |
| **Italy** | 325 | 281 | 384 | 36,8% | 18,1% | 7% |
| **Netherlands** | 230 | 208 | 263 | 26,7% | 14,7% | 5% |
| **Sweden** | 103 | 95 | 118 | 24,4% | 14,5% | 2% |
| **Belgium** | 97 | 100 | 116 | 16,2% | 19,3% | 2% |
| **Denmark** | 77 | 83 | 100 | 20,8% | 30,3% | 2% |
| **Intra UE (27)** | 3853 | 3428 | 3964 | 15,6% | 2,9% | 73% |
| **Extra UE (27)** | 1361 | 1225 | 1455 | 18,8% | 6,9% | 27% |
| **TOTAL** | 5215 | 4653 | 5419 | 16,5% | 3,9% | 100% |

*Except Northern Ireland
Source: ATP - Associação Têxtil e Vestuário de Portugal (2020)

With Portugal's accession to European Free Trade Association (EFTA) in the early 1960s, the country became one of the world's largest exporters of textiles and clothing, and its products were recognized worldwide for their excellent price-quality relation (Amador & Opromolla, 2009; Sierra, 2007).

The accession of Portugal to the European Economic Community (EEC) in 1986, as well as the adoption of the European Single Market in 1993, contributed even more to the liberalisation of the export markets for these industries. Nonetheless, import limitations established under the Multifibre Arrangement (MFA) protected the European Economic Community (EEC) market, giving Portuguese exporters a competitive advantage in the European market (Amador & Opromolla, 2009).

Textile firms, particularly those focused on technical textiles demonstrated a high level of innovation by adding new features and capabilities to traditional textiles, and obtaining, or reinforcing a competitive advantage over international competitors. So, the evolution of the Portuguese textile sector has been very positive, producing a wide range of competitive products with different applications and features (David *et al.*, 2013).

In high-value-added categories of products, research and development are critical competitive factors: materials, design, and marketing, for example, are critical in the fashion and sportswear industries (Amador & Opromolla, 2009).

The apparel and knitwear industries account for most of Portuguese textile exports. Most of the exports are to other European countries, namely, Spain, Germany, the United Kingdom, France, the Netherlands, and Italy. Because of this orientation towards foreign markets this sector is particularly exposed to changes in the international arena (Marques *et al.*, 2016).

As was expected, the pandemic had a negative impact on the exports of almost all textile and clothing products (table 4). However, these exports quickly recovered and to levels higher than before pandemic, except for fabric clothing.

Textiles and clothing are different activities, but they are interrelated in terms of technologies and trad. The textile industry is generally more capital intensive and highly automated when compared to the garment sector, especially in more industrialized countries. Furthermore, it is less adaptable than the garment business when it comes to responding to seasonal consumer demands (Sierra, 2007). Textiles are the main input of clothing products (Amador & Opromolla, 2009). Clothing is often a labour-intensive industry, with most of the production taking place in small and medium-sized firms. However, low and high value-added segments occur within the same sectors or even within the same industry, indicating that textiles and clothes are not uniform in terms of production sophistication (Amador & Opromolla, 2009). The apparel business is a low-wage, labour-intensive industry that supplies a high-quality, inventive fashion market. It provides non-qualified workers with entry-level jobs in both developed and developing countries. It is a highly advanced sector, and the characteristics have made it suited as the first rung on the industrialisation ladder in developing countries. There are high-value-added segments in this sector where design and research and development are critical competitive drivers. Both industries are intimately linked in terms of technologies, trade and vertical supply chains that are rapidly connecting them at a micro level (Sierra, 2007).

Table 7 provides data about the relative importance of the textile and the apparel industries in terms of number of firms, turnover, and workforce.

**Table 7** - Portuguese textile and clothing industries in 2020

| | **Textiles** | **Clothing** |
|---|---|---|
| **Number of firms** | 31,49% | 68,51% |
| **Turnover** | 49,44% | 50,56% |
| **Number of Employees** | 35,62% | 64,38% |

Source: (Banco de Portugal, 2021)

In the last years there has been a strategic change in the business model of firms in the fashion sector, mainly in the footwear, with the development of new products and their own brands supported by marketing campaigns abroad with some help by the Portuguese government (Marques *et al.*, 2016). With this investment in the foreign markets, 95% of production is exported to 152 countries in the 5 continents. The representation of Portuguese fashion industries in international fairs, exhibitions and congresses have been increasing over the years (Marques *et al.*, 2016).

The development of new goods resulting from the use of novel fibbers, yarns, or tissues is not the only kind of innovation present in this industry. It is also possible to innovate through manufacturing processes, but this is not the more frequent situation. Given the maturity of the sector, process innovation comes faster from changes in business processes, than from changes in the production system (David *et al.*, 2013).

Some firms focus mainly on their core capabilities, while their external partners improve the other parts of the value chain (Velasquez *et al.*, 2021) .

The clothing and the footwear produced in the country are well recognized internationally. "Made in Portugal" means more and more that the products the customers are receiving have a creative design, customization, excellent production and a very strong engineering and production design (AICEP, 2020).

During the conference "Marca Portugal" held by AICEP in September 2021, one of the topics under discussion was the image the British market has about the Portuguese products and companies. The study carried out by VMLY&R Lisboa considered 48 attributes defining the image of a brand, as presented in table 8.

**Table 8** - 48 Attributes defining the image of a brand

| | | | |
|---|---|---|---|
| Arrogant | Independent | Creative | High Performance |
| Bold | Improving your Market | Kind | With Social Concern |
| In Fashion | Sociable | Glamorous | Classy |
| Charming | Intelligent | Radical | Healthy |
| Gaining Popularity | Simple | Practical | Worth Payment More for |
| Cool | Carefree | Sensual | Energetic |
| Friendly | Prestigious | Traditional | Direct |
| Different | Distinguished | Caring for Customers | Distant |
| Dynamic | Authentic | High Quality | Safe |
| Good Value for Money | Unique | The Original | Innovative |
| Stylish | A leading Brand | Visionary | Up to Date |
| Trustworthy | Entertaining | Helpful | Progressive |

Source: Data from VMLY&R Lisboa as treated by (aicepPortugalGlobal, 2021) from Conferência Marca Portugal

In 2019, according to this study of VMLY&R Lisboa, the UK considered the “Made in Portugal” brand as "Charming, Authentic, Practical, Fashionable, Cool, Stylish, Distinctive and Different". In terms of brand health, the results were the following (aicepPortugalGlobal, 2021):

- Portugal was characterized as being a country where companies have a distinct differentiation, more relevance, more esteem;
- in terms of knowledge the situation was the same compared to previous years;
- the valuation of “Made in Portugal” as a brand was growing more and more.

# 3. Brexit

Brexit is a process that has brought about new challenges for the firms which are already exporting, or are considering to export to the UK (Casadei & Iammarino, 2021). In spite of what has already been agreed between the UK and the EU, there is a lot of uncertainty about their future trade policies.

Several recent studies have found that Trade Policy Uncertainty (TPU) has a negative impact on enterprises' investments and involvement in foreign markets. TPU has a great negative impact on trade in labour-intensive industries. These industries usually include many micro and small firms, financially constrained and less capable of quickly adjusting the production in response to trade shocks (Casadei & Iammarino, 2021).

According to Euratex (The European Apparel and Textile Confederation), Brexit has brought losses to the textile and clothing industry in both the EU and the UK which could get worse due to the new entry rules that will now come into effect with the new customs regime (Euratex, 2022).

Data provided by the confederation shows that in the first 9 months of 2021, trade figures have seen a significant drop compared to the same period in 2020, the EU imported 44% less (€2 billion) and exported 22% less (€1.6 billion) of textiles and clothing to the UK. Of these sectors, the one that was reported to suffer the most significant drop was clothing, which lost 3.4 billion € in the first 9 months of 2021. In spite of this, the British market remains the most important export market for the EU countries (Euratex, 2022).

A recent study conducted in 2021 by the UK Fashion and Textile Association (UKFT) referred by Euratex , with 138 firms including textile producers, fashion brands, wholesalers, agencies, garment producers and retailers, concluded that 71% of respondents relied on imports from the EU, 92% reported an increase in transport costs, 83% experienced an increase in customs costs and red tape, 53%

experienced order cancellations due to the way the EU-UK deal was being developed and finally 41% were affected by double taxation (Euratex, 2022). Euratex, also mentioned that perhaps the current situation could get worse, given that since January 2022, customs controls have been tightened, which makes export and import rules more stringent. The products must have a valid declaration and a customs approval, and exports from the UK to the EU must have declarations from suppliers and product codes which have changed.

With the new trade deal in place, the confederation says it is necessary for both the EU and the UK to cooperate in order to avoid constraints due to the issues now raised with Brexit, which is holding back the flow of trade on both sides.

# Chapter 2
# Methodology

The initial plan for my internship at AICEP's offices in London was to find business opportunities in the UK for Portuguese companies in the fashion sector. The first phase of this plan was to find fashion stores from clothing to footwear in the West Midlands (Birmingham), West Yorkshire (Leeds) and Greater Manchester (Manchester, Merseyside). The second phase of the plan was to collect information from the people in charge of the stores. The third phase would be to contact this people by phone to see if they were interest in receiving information about the Portuguese supply in the fashion industry.

Since this was going to be a time-consuming process, the initial plan was changed and replaced by the methodology followed in this thesis. This methodology consisted in constructing case studies based on semi-structured interviews with top managers of 4 companies of the textile and clothing industries engaged in internationalisation towards the UK market with the support of AICEP.

In order to help me in the process of finding companies in the fashion sector to do the interviews, AICEP provided a list of some companies with whom they currently work or have already worked in a more active way in the past. After analysing the contacts provided, 6 companies were chosen to be contacted through AICEP’s client managers, who did it by email. Of the 6 contacts that were made, 4 accepted to have the interview which took place remotely in March.

In spite of being a small sample, there was an effort to choose companies operating in the UK market which are of different sizes, age, products exported and experiences of internationalisation.

The interviews were structured in order to collect information adequate to examine the research questions presented in the introductory chapter and taking into account the literature review and the data presented in chapters 2 and 3.

The interviews were divided in the following 6 parts:

1) Characterisation of the company
2) General characterisation of the internationalisation process
3) Motivations for the internationalisation process
4) Characterisation of the internationalisation process in the UK
5) Barriers to entry to the UK market
6) Role of AICEP and other entities in the internationalisation process of the company in the UK

The full contents of the interviews guidelines is presented in appendix.

# Chapter 3
# Case Studies

## 3.1 Case Study 1 - A. Ferreira e Filhos, SA

### 3.1.1 Description of the company

According to information available on the company's website and declarations of its Administrator and Commercial Director Mr. Noel Ferreira in the interview he had with me, the company A. Ferreira & Filhos, S.A. (Aferfi), with headquarters in Caldas de Vizela, was founded in 1980. Although it is a Public Limited Company, all the shares are held by the family. The focus of this family business is the design and production of outerwear, including clothing for men, women, children and blankets and pillows (home textiles).

The company has annual production of 300,000 pieces and a turnover of around 5 million € totally made in Portugal. The number of employees is above 80. The production capacity and quality are oriented to meet the needs of the different clients, adapting to the demands of various markets (A.Ferreira e Filhos, n.d.).

Given their products quality and accuracy and their ability to innovate and anticipate the needs of increasingly demanding markets, the company's goal is to consolidate an already strong position in domestic and international markets, offering products of excellence, and continuing to be a reference company in the sector. In addition, one of the company’s goals is to create collections with more sustainable materials and processes compared to conventional ones, ensuring an environmentally and socially responsible production of goods.

### 3.1.2 Characterisation of the international process

The internationalisation process of the company began in 1986, 6 years after its foundation. The first country selected for internationalisation was Germany. According to Mr. Ferreira, since the beginning, the aim has been to produce for export which now represent more than 98% of the total production.

When the company was founded, and still under the leadership of the company's founder, Mr. Ferreira’s father, only intermediate products were produced. So, at that time, the company did not export. This only began to happen when the company was able to produce finished products.

Exports are mostly done through direct marketing. In the beginning this was a time-consuming process because of the paper work required for export registration and the quotas that constrained exports before the accession of Portugal to the EU.

Currently, Aferfi produces for both its own brand and for other brands (private labels), with the own brand representing 51% of the total production. One of the other brands for the company´s production is the INDITEX group, the largest Spanish fashion and retail group.

Considering both the company’s own brand and other brands, the main external market is Italy, with a clear dominance of the other markets. Portugal is the second most important market, here with the prevalence of the own brand sale. The third market is France where the other brands prevail. The UK, the focus of this study, is the fourth market.

In the words of Mr. Ferreira "the rest of the world is bigger than Portugal. So, we never saw Portugal as a business place". This was the main reason responsible for directing the company, since the beginning, to go international.

The company has a strategy to grow in size because this helps in terms of capacity to export and because customers prefer to buy from larger companies. This strategy is paying off because the demand from the external markets is increasing.

### 3.1.3 Characterisation of the international process to the United Kingdom

The exports to the UK market began at the private label level at the end of the 1980s. Currently they represent about 11% of exports, but in the recent past they represented much more.

Regarding the own brand, it is currently available on the electronic platform "Children Salon", and the main private label is "The White Company" in London.

Mr. Ferreira has also mentioned that they prefer direct export, so that indirect export has little expression.

Regarding the possible adaptation of the products to correspond to the United Kingdom markets and their different demands, it was mentioned that any error, namely in a label, forces everything to be customized. The initial proposal of the product is made by the company. Then the customer chooses and changes this proposal according to his will.

Written communication is normally in Portuguese and English, not only on their website, but also in the virtual showroom launched in March 2022, a new form of promotion that, due to the pandemic situation, the company had found as a novel alternative to reinvent itself.

This virtual showroom has been very important in the commercial communication and promotion in the British market, together with the participation in fairs, and the travels and in-person visits to customers.

The company did not feel any difficulties in the internationalisation to the UK in terms of language, specifications and transportation. However, this situation has changed due to the Brexit. The increase of the transportation prices became a great obstacle because it increases the price of the product putting this market at risk. There is, however, some hope that this will not happen. Portugal is very well known not only in the United Kingdom market, but also in other markets for the rapidity, and price of its fashion sector products.

It is also relevant to mention that this company has never experienced difficulties related to the perceptions of the UK market about the Portuguese products and companies. The company has certifications that ensure that it follows good and ethical practices which is important for British consumers.

Regarding the role of AICEP for Aferfi, Mr. Ferreira mentioned in the interview that currently they do not use AICEP services so much. He recognises many strengths in this agency, namely the youth that the agency now has, making it more dynamic when compared with previous years.

Nowadays, he considers that his company is able to internationalise without AICEP.

## 3.2 Case Study 2 - Tri-wool, SA

### 3.2.1 Description of the company

Tri-wool SA is a company based in Porto, founded in 2011. With a sustainable and innovative technology, it focuses on the design and production of knitwear (Tri-Wool SA, n.d.). Nowadays it employs 160 people, producing around 3.8 million per year and 8900 prototypes. In the interview with one of the founding partners and current Commercial Director, Dr. José Pedro Barros, he reported that the Covid pandemic influenced the company's turnover. In the pre-pandemic period, the company's sales were around 24 million € per year, but in the last two years they came down to 10 million €.

### 3.2.2 Characterisation of the international process

Since the foundation of Tri-wool, SA, the goal has been to export their production. The company only exports its own products. The first export markets were France, Spain and the UK. There is no sales in the domestic market.

Currently, the company is present in 11 markets. The most representative one in terms of sales is Spain (around 15 million €), followed by France, Germany and the UK. Most of the exports are for EU countries.

According to one of the company's founding partners, "the world is here to be conquered and you can't have scale if you don't leave Portugal (...) The domestic market is not even relevant when you are in the foreign market". This was the main push for the company to start its internationalisation process.

### 3.2.3 Characterisation of the international process to the United Kingdom

Tri-wool began its internationalisation process in its first year, exporting to a small British shop. From there the company began to conquer the UK market. 10% of the total turnover comes from this market. In the past years new collaborations were formed, including high street fashion stores, such as Topman, Topshop, River Island and Paul Smith, one of the most renowned shop due to its quality, not only in the UK but also in the rest of the world. The INDITEX group is also a client of the company.

As Tri-wool is considered a company with a strong creative component, it has the possibility to work with different markets directly, all their exports are done directly.

As far as product adaptation is concerned, Tri-wool presents a range of products in which the company is considered an expert. A creative team of 12 designers is responsible for the development of products meeting the needs of consumers from different markets.

Tri-wool designs the products, and then their clients select the ones they want. After this choice, the company's factory in Esposende (Portugal) produces the quantity of pieces ordered by the client in a relative short time. If necessary, small adjustments are made depending on the specification of the market to which the product is being exported. As fashion is increasingly globalized, according to Dr. Barros, what is consumed in the USA will eventually be consumed in other countries such as the UK, turning the product into a global one.

It was also mentioned in the interview that no difficulties arose at the beginning of the internationalisation process. However, since the UK left the EU, "administrative barriers" have been created. In spite of these problems the British market continues to desire to work with Portugal because of its closeness, quality, and speed/short delivery periods.

Dr. Barros didn’t provide information on how AICEP supported his company, but he showed interest in meeting with AICEP in order to discuss a future strategy to be more present on the UK market, has Tri-wool, own brand, is looking for an agent to represent the brand in this market.

## 3.3 Case Study 3 - Coisas do Algodão, SA

### 3.3.1 Description of the company

The company Coisas do Algodão SA, founded in 1999, in Barcelos (Portugal), is dedicated to the development and production of knitted garments. In the interview conducted with the Business Developer Manager of the company, Dr. Francisco Miranda, it was reported that the turnover dropped during the Covid-19 pandemic to about 7 million €. The company currently has 65 employees who work to respond effectively to the customers, developing products to meet their needs. The materials used by the company are of high-quality because the company's policy is the have a high standard of perfection in their products (Coisas do Algodão SA, n.d.).

### 3.3.2 Characterisation of the international process

The internationalisation process of Coisas do Algodão SA, began through indirect exports, in the very first year of the company's exports to the UK market. In the following years, the company had almost no sales in the domestic market, with exports accounting for 99.9% of the total sales. Besides the UK, the company has a close business relationship with Germany and Sweden. Currently, international markets represent 90% of the total turnover. Because of the Covid-19 pandemic and the war in Ukraine, the demand has decreased.

There is no exclusive allocation of employees to the internationalisation activity, following what is the practice in many clothing businesses.

The main motivation responsible for the internationalisation of the company was to grow. In fact, given the fact that the domestic market is small, and the production for that market would also be of a small scale. A workforce of 65 employees would not be justified. So, exports are crucial for the company to sustain and grow its capacity and to have opportunities for learning and for gaining competitive advantages positioning ahead in terms of the offer of certain articles, finishes and types of washing.

### 3.3.3 Characterisation of the international process to the United Kingdom

As previously mentioned, the process of internationalisation to the UK began in 1999.

As far as the adaptation of the products to the UK market is concerned, their characteristics meet the client's requirements and are adjusted accordingly.

When the process of exporting to the UK market began it was only for one client. According to Dr. Miranda, it was a difficult process because it was a demanding client which required numerous certifications and was very strict regarding the quality of the products.

For Coisas do Algodão, like for other companies exporting to the UK, Brexit is the biggest hindrance in this export process because of the increase in the transaction costs, but Dr. Miranda, is hopeful that the UK market will keep its demand of the Portuguese fashion products due to the credibility they have gained in recent decades.

AICEP reached Coisas do Algodão, SA initially through campaigns that the agency has. The interviewee considers that is important the fact that AICEP provides contacts with companies and possible partners form other markets. It was mentioned that AICEP helped in identifying business opportunities and strategic partnerships.

## 3.4 Case Study 4 - Lemon Jelly

### 3.4.1 Description of the company

The case study that will be discussed next is the brand called "Lemon Jelly" belonging to the company Design e More, SA which is part of the group PROCALÇADO SA, a family company. According to the Commercial Director of Lemon Jelly, Dr. Catarina Vestia, this group has already 50 years in the market. In the beginning of its activity it produced soles for the biggest brands in Europe (Lemon Jelly, n.d.). In 2013 own brands of injected footwear were created, namely WOCK for the professional market and "Lemon Jelly" for the fashion segment.

Because it is a business group, the mother company has some shared services, the total workforce being of 400 employees. 15 of these employees are dedicated exclusively to Design e More SA.

Its was not possible to get information about the company's turnover. Dr. Catarina Vestia only mentioned that in 2021 it increased by 100% compared to the previous year.

### 3.4.2 Characterisation of the international process

Internationalisation was the goal of Lemon Jelly since the creation of the brand, with nowadays 95% of the total production sold in foreign markets. The first foreign invoicing came from Japan. This strong focus on exports is due to the fact that the domestic market is small, not only in terms of number of consumers, but also because there are not so many fashion shops in the medium-high positioning aimed by this brand.

Exports are made both directly to the consumers and indirectly, through intermediaries such as agents and distributors. In the case the export is made through an agent, this one is responsible for representing the brand in the market in question, and invoicing is conducted by the company to the client, as required from a legal point of view. When it comes to more distant markets, the brand usually uses distributors, which are considered partners to whom it invoices and then they make the distribution in that market.

Given the brand's strong focus on internationalisation, many of its employees are dedicated to this process.

The most important markets for Lemon Jelly are the European countries, but USA and Canada area also important. To be more precise, of the 35 markets in which the brand is currently present, the top three are Germany, France, and the USA.

For Lemon Jelly, internationalisation was an easy process because of the unique characteristics of its product. The particular smell of lemon of its boots brings a special sensory felling, leading customers to wonder where that smell come from.

### 3.4.3 Characterisation of the international process to the United Kingdom

The internationalisation to the UK market began in 2014. UK was one of the most difficult markets to penetrate, particularly in the fashion segment. It is a very "performance driven" market. When this does not happen, second chances are not common. The decisive factors are either the performance or the price. So, Lemon Jelly's path in this market has been characterised by ups and downs, but with a positive trend.

Initially the exports of the brand were made directly. However, a representative in the market is now responsible for invoicing, shipping, and contacting the clients.

Because Portuguese footwear products are well recognized in international markets this facilitates the beginning of the internationalisation process. However, like for the other companies operating in the UK market, there are now problems because of the duties, the increasing transaction costs caused by the Brexit.

The products associated with this brand turn out to be the "perfect product" for the UK market insofar as a large part of the offer are boots. In fact, the UK is recognized as being a country with unstable weather, mostly raining. This is the reason why the company did not feel the need to adapt the product to this specific market. This does not exclude that, in the future, modifications or adaptations may occur.

In fact, the company is currently investing in stronger communication and participation in fairs in the UK market. It is also carrying out a pilot test to understand the acceptance of its products in this market, using a PR agency, digital platforms, and influencers to gain recognition with the end client. Furthermore, the brand is highly focused on environment and sustainability.

Regarding the prices of the products, in a world where there is easy access to information, the company's policy is the equalization of prices mainly at the European level.

The role of AICEP in this company was mainly through programmes, such as the support to participation in fairs. The company was also helped by AICP in terms of data and studies about the UK market. The interviewee considers that the support Lemon Jelly has received so far has been very good, in the sense that AICEP has always been very helpful, and she believes that they could use more support than what they have asked so far.

# Chapter 4
## Conclusion, shortcomings, and suggestions for future work

As we have seen in the literature review, in all the four case studies internationalisation is a strategy for firm´s economic sustainability and growth when the domestic market is small which is the case of Portugal.

Also, as we have seen in the literature review, firms' own brands when associated with good quality can be very important for promoting internationalisation. This has been very clear in the case studies that were presented. This being said, in a world with globalised supply chains, integration in this kind of chains also provides good opportunities for successful internationalisation. This kind of strategy is also present in the case studies.

The literature review also pointed out the importance for a successful internationalisation of the capacity to adapt the products design to the specific needs of the clients in the export markets. Again, this strategy is clearly present in the case studies.

In the literature review we have referred to the growing importance of online internationalisation through e-commerce. In the case studies that were presented some companies include this kind of market channel in their strategies.

Finally, as expected, Brexit is causing problems to the companies exporting to the UK market. The company managers that were interviewed were hopeful that the established recognition of the quality of their products by the UK consumers and the investments they are making to improve this recognition even further will help to overcome those difficulties.

Also, the persons interviewed recognised that organisations such as AICEP are useful to support the internationalisation process in various ways, such as, the provision of information about export markets and the support for the participation in fairs.

The main shortcoming of this work is that there was not enough time to make more case studies. Also, concerning more specifically the UK market, it is still too early to know the full effects of the Brexit.

So, work to be done some years from now would make possible to study better the effects of Brexit. Also, with more time to continue this work, it would be possible to collect more case studies and see if, as in the cases presented here, it is important for the success of internationalisation factors such as brand, integration in global supply chains, adaption to consumers' needs and the inclusion of e-commerce in the channels to reach foreign markets.

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# Appendices

## Appendix 1 – Interview Script

**1. Caracterização da empresa**

1.1. Nome da empresa: ________________________________

1.2. Qual a sua posição na empresa: ____________

1.3. Data de fundação da empresa: ________________

Empresa familiar:

- ☐ Sim
- ☐ Não

1.5. Número de funcionários: ____________

1.6. Qual é o valor aproximado do volume de negócios da empresa no ano mais recente para o qual tem informação: _______

1.7. Indique, por favor, qual o CAE (Classificação Portuguesa de Atividades Económicas) da sua empresa: ___________________

**2. Caracterização geral do processo de internacionalização**

2.1. Indique, por favor, qual o ano da primeira internacionalização e qual o país de destino: ________________

2.2. Em que momento se iniciou o processo de internacionalização:

- ☐ Depois de a empresa estar estabelecida no mercado interno
- ☐ No início da atividade da empresa, em simultâneo com o processo de estabelecimento no mercado interno

2.3. De que forma foi feita a primeira internacionalização:

- ☐ Exportações diretas realizadas pela empresa
- ☐ Exportação indireta (por exemplo através de um agente)
- ☐ Outra (especificar): ____________

2.4. Pode, por favor, indicar em quantos mercados internacionais está presente atualmente, e quais considera serem os mais importantes em termos de volume de negócios: ____________

2.5. Em relação ao volume de negócios da empresa associado a mercados internacionais, pode, por favor, dar uma indicação sobre o seu valor? __________________

2.6. Se aplicável, indique, por favor, o número de colaboradores dedicados exclusivamente às atividades de internacionalização da empresa: ____________

2.7. Indique se tem contacto com entidades no estrangeiro ou com entidades portuguesas com ligações ao estrangeiro? Se sim, como caracteriza o impacto dessas relações no processo de internacionalização da vossa empresa? (Por entidades entende-se grandes empresas, outras empresas, associações comerciais e organizações do sistema científico e tecnológico (como por exemplo universidades)).

**3. Motivações para o processo de internacionalização**

3.1. Pode, por favor, indicar quais os motivos que conduziram à internacionalização da empresa?

- ☐ Oportunidade de crescimento

☐ Saturação do mercado interno

☐ Pressão competitiva no mercado interno

☐ Procura do mercado externo

☐ Exploração das competências fundamentais/ vantagem competitiva

☐ Possibilidade do aumento da carteira de clientes

☐ Outra (especificar): ____________

**4. Caracterização do processo de internacionalização no Reino Unido**

4.1. No que respeita ao processo de internacionalização para o Reino Unido, pode, por favor, indicar qual o primeiro ano de internacionalização: __________

4.2. Em termos do volume de negócios total da empresa, pode, por favor, indicar qual a percentagem proveniente de atividades internacionais para o mercado do Reino Unido: _____________

4.3. De que forma foi feita a entrada no mercado do Reino Unido:

☐ Exportações diretas realizadas pela empresa

☐ Exportação indireta (por exemplo através de um agente)

☐ Outra (especificar): ____________

4.4. Atualmente, a presença da empresa no Reino Unido continua a ser caracterizada pela forma referida na questão anterior, ou optaram por uma presença de outro tipo? Se sim, qual?

☐ Exportações diretas realizadas pela empresa

☐ Exportação indireta (por exemplo através de um agente)

- _Acordos contratuais
- _ Licensing
- _ Franchising

- _ Outro (especificar): _________

☐ Joint venture

☐ Aquisição

- _ Subsidiária de vendas
- _ Subsidiária de produção
- _ Outro (especificar): ___________

☐ Investimento greenfield

- _ Subsidiária de vendas
- _ Subsidiária de produção
- _ Outro (especificar): ___________

4.5. O(s) produto(s) foi(foram) adaptado(s) para corresponder aos mercados do Reino Unido e às suas diferentes exigências? De que forma?

4.6. O preço e o posicionamento de preços (cf. baixo custo vs. premium) têm sido diferentes no mercado britânico e no mercado interno?

4.7. Que tipo de comunicação e promoção comercial está a empresa a utilizar no mercado britânico?

**5. Barreiras à entrada no mercado do Reino Unido**

5.1. No que respeita ao processo de internacionalização do Reino Unido, indique se surgiu algum tipo de barreira/dificuldade que possa de alguma maneira ter prejudicado especificamente o processo de internacionalização nesse mercado? Se sim, qual ou quais?

☐ Falta de informação sobre o mercado estrangeiro

☐ Falta de incentivos e apoio do governo

☐ Dificuldade em adaptação aos requisitos locais

- ☐ Dificuldades de financiamento
- ☐ Outra (especificar): ________________

E de que forma lidaram com essas barreiras?

5.2. De que forma tentaram ultrapassar essas barreiras? Adotaram uma estratégia específica pensada para o mercado do Reino Unido ou adotaram uma estratégia já implementada num outro mercado?

5.3. No que respeita ao Brexit, considera que este já teve algum impacto direto na vossa empresa? Se sim, indique, por favor, quais os efeitos sentidos.

5.4. Pela sua experiência no mercado do Reino Unido, o que pensa serem as características procuradas por este mercado nas empresas portuguesas no setor da moda, como têxteis/ vestuário e calçado?

5.5. Tendo em conta as características atrás referidas, pensa que estas facilitaram o processo de internacionalização da sua empresa? Sentiram algum tipo de dificuldades relacionadas com as perceções que o mercado do Reino Unido tinha/tem sobre os produtos portugueses/ empresas portuguesas, que tenham obrigado a empresa a investir em estratégias para ir de encontro ao que o mercado do Reino Unido procura? Se sim, pode, por favor, elaborar um pouco sobre as dificuldades sentidas e as estratégias adotadas?

5.6. Daria algum tipo de recomendações às PME que pretendem atualmente iniciar o seu processo de internacionalização? Se sim, qual ou quais e pode, por favor, elaborar um pouco sobre isso?

**6. Papel da AICEP e de outras entidades no processo de internacionalização da empresa no Reino Unido**

6.1. A empresa teve a necessidade de recorrer à AICEP e/ou a outras entidades para obter apoio ao processo de internacionalização da empresa no mercado britânico?

- ☐ Sim
- ☐ Não

(ATENÇÃO: No caso de resposta ser "Não", o questionário terminou)

6.2. Quais os principais motivos que levaram a sua empresa a recorrer aos serviços da AICEP?

6.3. Pode, por favor, indicar o tipo de serviço que a AICEP prestou na sua empresa, e em que medida essa ajuda pode ter tido influência no sucesso no mercado britânico.

- ☐ Ações de promoção no mercado britânico
- ☐ Esclarecimento de dúvidas relativas a regras e regulamentações
- ☐ Apoio na identificação de parcerias estratégicas
- ☐ Realização de estudos setoriais e de mercado
- ☐ Consultoria em todas as fases do processo de internacionalização
- ☐ Apoio à participação em feiras comerciais no mercado britânico
- ☐ Representação da empresa no mercado britânico
- ☐ Ajuda na constituição de redes de cooperação orientadas para o mercado britânico
- ☐ Outras (especificar): ___________________

6.4. Se aplicável, como classifica o apoio da AICEP à empresa? (classificar de 1 a 5 a experiência)

Muito obrigada pelo seu tempo e colaboração

# Appendix 2 – Consent Form for the use of the information collected in the interviews for the Final Paper of the master's degree in Marketing

**Formulário de Consentimento para utilização da informação recolhida nas entrevistas para o Trabalho Final de Mestrado em Marketing de Matilde Fonseca a submeter à Católica Porto Business School intitulado** "Internationalisation Process of Portuguese Companies in the Fashion Sector in the United Kingdom"

Com a presente entrevista pretende-se entender o processo de internacionalização das empresas portuguesas no setor da moda, nomeadamente os motivos que as levaram a esse processo, bem como as dificuldades e soluções encontradas, sobretudo no mercado do Reino Unido. Esta informação destina-se exclusivamente à elaboração do meu Trabalho Final de Mestrado em Marketing a submeter à Católica Porto Business School. Nenhuma informação recolhida nesta entrevista será utilizada de modo contrário às autorizações abaixo expressas pelo entrevistado.

(Matilde Fonseca)

Eu, abaixo-assinado,

Autorizo que a entrevista seja gravada:

- ☐ Sim
- ☐ Não

Autorizo que a informação recolhida na entrevista seja incluída no Trabalho Final de Mestrado em Marketing de Matilde Fonseca:

- ☐ Sim
- ☐ Não

Autorizo a divulgação da minha identidade assim como o nome da organização a que pertenço:

- ☐ Sim
- ☐ Não

Data: _____/______/_______

Assinatura:

________________________________