SMALL AND MEDIUM SIZED TIMBER ENTERPRISES CAPABLE OF EXPORTING

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KEY WORDS Management, Export, Productivity, Competitiveness

INTRODUCTION

The forest-industrial sector, is strongly inserted and is of socioeconomic importance in the Province of Misiones, Argentina, the same as in the regional and national environment, since the foreseen and fulfilled, foreign investments carried out in the sector between 1994 and 2001 were of U$S 3 billion, (60% settled in the region. Misiones, Argentina: U$S 1.2 billion and in the Province of Corrientes, Argentina, U$S 600 million).

Argentina has a great potential, manifested through no less than 15 million hectares of soil, apt for commercial forest cultivation; 5 million hectares are in the Mesopotamia, 6 million in Buenos Aires and other 4 million in the Andean Patagonian Region.

The opportunities which are in the region are: exceptional ecological condition to achieve better results, material genetically improved, diversified forest base (Pinus Eliotti, Pinus Taeda, Pinus Caribbean, Eucalyptus, etc.), availability of high productivity soil and low cost, promotion regimens and important foreign investments in the sector.

This is due fundamentally to the comparative advantage that, nature itself with its subtropical climate, causes the implanted forests to grow quickly. While 20 years are needed to complete a forest in the red soil; Southern Argentina, Canada and the Scandinavian Countries; need more than 70 years. Also, the price of land is low; and the soil, does not compete with agricultural activity (Peirano, 1996: 48).

Although 50% of the forested surface is in the hands of big land owners', with surfaces of more than 2,000 hectares each one, Misiones, Argentina presents a great property atomization, where it is considered that there are nearly 8,000 forest producers with an average surface from 20 to 25 hectares each, prevailing those who are genuinely local.

The main consumers are sawmills and wood cellulose industries, as for the laminators and the reconstituted board industries they are consumers at a smaller scale.

The Misiones Argentina forest industry, based on structural wooden products is diversified, it is composed of sawmills.

According to the Misiones' Province Ministry of Ecology and Renewable Natural Resources, 2000 Industrial Forest Census, there are 732 wood transformation industries, with 7,103 employees. (see chart 1).

Chart Nº 1: *Wood Transformation Mechanical Industries - Misiones, Argentina*

Classification	Production Range	Nº of industries	Participation %
Small industries	0 - 600 m3	700	95.63
Medium	601 - 1900 m3	24	3.28
Medium Large	1901 - 3500 m3	5	0.68
Large	more than 3500 m3	3	0.41

Source: Misiones - Ministry of Ecology and Renewable Natural Resources. Forests and Forestation Undersecretary. 200I Forestry Census.

The Misiones, Argentina sawmill industry, is the main sawed wood producer in Argentina. More than half the consumption is covered by Misiones' production. The growth of the industry in Misiones increased 152% and the exports 5 times, between 1991 and 1997 (Peirano, 1999:14).

The Misiones Province forest sector small enterprises have increased the production volumes in a remarkable way, at the end of the 90's. From the following chart, (see chart 2) one can see that the timber wooden production volume increased, in the period 1992-1998, 61%, while the value of this production has only been increased by 40%, that is to say that the marginal yield of each increased production unit, is falling.

***Chart Nº 2**: Volume and production and export value of industrialized products of: Misiones' native and implanted forest, between 1992 and 1998*.

	1992	1993	1994	1995	1996	1997	1998
Native Wood Production (m3)	215,174	206,348	194,382	168,633	187,115	203,280	226,697
Implanted Wood Production (m3)	441,259	528,646	567,575	529,806	588,399	715,438	829,280
Production (in millions of $) *	244,095	242,865	202,885	205,562	247,814	265,454	3,425,047
Exports (in thousands of U$S)	1,196	1,393	3,064	13,161	16,680	11,261	15,229

Source: Forests and Forestation - Ministry of Ecology and Renewable Natural Resources Undersecretary of Commerce and Integration MA and P Province Institute of Statistics and Census -
*It includes sawmills and laminated and three-ply factories.

This fact observed from the economic point of view, would show a decrease of general productivity of the sector in terms of money, from the perspective of management one could also say that there exists a process of value deterioration.

A hypothesis could be that the value deterioration is directly linked, among other variables, to the kind of management of the enterprises' sector, since in spite of production value loss; they increase volumes production with the apparent purpose of compensating the losses or the expectations of increasing their earnings

The Brazilian consultant's study (STCP, 2002), indicates that technology is differentiated in function due to industry types and depends on a mixture of capital goods of different origin (domestic and exported). In the Small and Medium Sized forestry-industry Enterprises, low mechanization levels and automation prevail. On the other hand, three critical factor groups are identified, that are presented interrelated

and limit the development of the Small and Medium Sized forestry-industry Enterprises: **a)** ***Management:*** if this were better qualified it would provide an optimum use of the resources available; **b*) Technological Level***: "due to the low technological level employed in the primary process (sawmill) and secondly (remanufacture), the industries lose competitiveness, due to high production costs, consequence among other factors, to the low yield obtained in the transformation of raw material and **c) *Productivity":*** ...are consequences of the relationship among the factors indexed previously. Their revision is of fundamental importance for reducing costs and for competitiveness earnings"

The Misiones, Small and Medium Sized forestry-industry Enterprises, have not shown, up to the present (2004), the necessary dynamism for the integral use of the existent forest plantations in the region, to generate solid goods and services suppliers markets, and to significantly favour the development of related activities. On the contrary, what one observes in general is that there are few enterprises that achieve and have technological and exportation dynamism. In a market of great competitiveness, without development of the second transformation of raw material, they must have qualitative jump to improve their productivity level, and to surpass the first transformation stage from timber to the second transformation and to the final product, managerial organization technological jump.

Due to this, our research pursues as general objective the determination of the conditions to increase competitiveness and production through the exercise of Small and Medium Sized Enterprises exports of forestry-industry timber products, located in the Province of Misiones, Argentina; for that it was necessary to:

- Prospect and determine the specific geographical, economic, social and cultural factor conditions where Small and Medium Sized Enterprises are found in the territory.
- To describe the structure of the forest-industry to which the enterprises belong, including an outline of rivalries between each other.

- To characterize the organization state of each one of the forest-industry Small and Medium Sized Enterprises capable of exporting.
- To identify the demand conditions.

An obstacle in the intents of generating any regional development, starting off from the increase of the Small and Medium Sized Enterprises forestry-industry, productive activities, is to find forms of guaranteeing their competitiveness, especially through the exports. Also those that operate on the same product are disarticulated among themselves, inhibiting the appearance of the synergies and complementarities. To face countless barriers that harm their competitiveness, the Small and Medium Sized Enterprises, almost always need new organization weapons that strengthen them, to react positively to such challenges. One of the competitiveness options is seen through the exports of the small and medium enterprises.

It is important to consider that it is a process, in which cultural factors necessarily intervene, which dimension themselves according to place, time, actors, available resources (technology, capacity, etc.). Those dimensions become stronger according to the incorporated knowledge degree.

KNOWLEDGE MANAGEMENT

The term "management" together with the concept of knowledge, has raised many controversies due to the fact that it supposes that knowledge can be managed as a very tangible good. But today nobody no longer argues that intangible assets constitute a very fundamental enterprise good, as Karl Sveiby says... “In the era of knowledge, the intangible assets gain protagonism and an outstanding place in the balance" (Kan Sveiby. 2000)

Knowledge is a social good, produced under determined conditions, hegemonized basically by its economic value. It is bound to life quality because it updates and perfections human nature and because it allows a fuller realization of the social group. Also, the production of knowledge, its distribution and appropriation are also conditioned by the forms of social organization and by the representations and senses nets had by individuals and groups.

The three papers (Mintzberg. 1974) in charge of administration in enterprise management are: the interpersonal, decision making and the informative. The interpersonal involves the agent with other people as much inside as outside the organization, the decider puts the agent in the decision making on operative topics, resources assignment and negotiations with the different organization levels; and the informant's role involves the agent as addressee and sender of information to a great variety of people and institutions.

Mintzberg's concepts present highly social connotations since the "making of agents" is interpreted as the acting of the agents and "coordinator's" role be taken as an "activities facilitator", because what is sought is to:

- Leave behind the idea of "work enterprises" for them to become "action enterprises."
- To obtain greater development possibilities when in processes, one gives way to creation and knowledge gestation.
- To leave behind the industrial era in the conception of these enterprise structures to go on to the era of knowledge.

Intellect management that is to say, to find the ways to transfer knowledge from one group to other, through functional and geographical frontiers - has become as important as to manage capital. In this kind of systems, the generation procedures and knowledge transfers are associated to research processes in the work practice and the

performance of evaluation and compensation systems are oriented to initiative promotion and to the search of results.

The concept of Knowledge is understood as knowledge that is built collectively and that circulates within an enterprise. This is due to the fact that knowledge only takes place in contexts that allow learning, and for which he who manages, should give place to a space where one can be original and creative, and not only from where information comes, when it has been selected, purified and modernized, according to a certain focus.

Those that adopt Knowledge Management processes should manage the use and reutilization of the built up knowledge, (effective, efficient and daily) and they circulate in an enterprise, among their internal clients, like part of their culture and that differs them from others. This differentiation is due to: the characteristics that it takes on in the individual knowledge integration dynamics, to the groups and between these (social knowledge); and for the Know How communication and information of the vital processes, when this it is taken correctly to people that need it, in the quickest and most economical way.

Said otherwise, it is about embodying organizational processes that look for data synergic combinations, with the capacity to process technological information and creative and innovative capacity. Yoguel (2003) considers when approaching the technological and innovation matter, that the complexity of technological policy design increases when incorporating the evidence that the agents also learn and that they generate knowledge by means of a tacit knowledge recombination, - that it acquires a fundamental role - the codified one; technological diffusion incorporates codification and formalization of new knowledge; and the innovation is nurtured from the tacit transformation of generic knowledge, by means of the practice of a private enterprise.

In the new scenario, given by the territorized enterprises and in search of knowledge this innovations development process, goes beyond the existence of formal

R&D laboratories, and beyond Nonaka's Knowledge Outline, seen previously, as to this one, an action characterized to possess a double circulation of knowledge, is added, (a going and coming between enterprises) and that when settling in each one of the net frameworks it acquires multiple forms. In that way Nonaka's Outline is reformulated by Yoguel, and would be as follows: knowledge internalization (coded knowledge transformation to tacit knowledge), socialization (enterprise tacit knowledge to the rest of the system), externalization (tacit knowledge that becomes coded) and transfer (transfer between coded knowledge enterprises) (Nonaka and Takeuchi, 1995, Yoguel, Gabriel, 2003).

lso, the intensity reached by the innovative process depends on the way in which knowledge is generated, circulates, is absorbed and adapts itself to the agents' specific necessities. Knowledge - especially the tacit one - cannot be assimilated to the information, reason why its circulation acquires a central role. This requires putting emphasis on the existent articulations among the enterprises' agents. That is to say, the effectiveness of the innovation system depends on the degree of existent connection between the agents and of their capacity to absorb information and knowledge (Yoguel. 2003).

THEORETICAL BASIS

According to what as the already been consigned in the Introduction, Misiones, Argentina is a dynamic province due to the diversity of its productive network, as well as the volume of its economic activity, but particularly as it has several regional poles (forestry-industry, yerba mate (*ilex paraguayensis*), tobacco, tea and others) with their own economic life and with ample competitive potential. It possesses a comparative localization advantage, due to its geographical position in Argentina, bordering with two MERCOSUR *(South American Common Market)* partners. However, Misiones,

Argentina has not translated this comparative advantage fully, into a Competitive advantage that allows it to be developed optimally, be it in the Argentine or in the foreign market.

Due to globalization, there is no other option but to market the goods, domestically or internationally, with the enough resources to enter the new game. This, demands that the enterprises, sectors, regions and countries competitively interact simultaneously in a sustainable way, under efficient articulation conditions to each other – be it inside productive conglomerates or clusters -, also operating under a competitive environment whose immediate scope is that of a favourable territorial and regional environment, full, sustained and sustainable developed, which imposes an analysis under *Systemic Competitiveness* focus.

In accordance with the Systemic *Competitiveness Model*, a dynamic interaction exists among several systems that affect the enterprises' competitive acting. The functioning of any of these alters the others in a direct way. That is why, a correct competitiveness discernment or competitive growth is impossible, without analyzing the interaction that there is among them. To carry out the systemic analysis, it is necessary to distinguish six levels of the systemic competitiveness. They are (Villarreal, R. 2002) 1) Microeconomic; 2) Mesoeconomic; 3) Macroeconomic; 4) International; 5) Institutional and 6) Political Social.

1. Microeconomic Competitiveness This requires a new model of managerial management based on sustainable competitive enterprises that are intelligent in the organization, flexible in production and agile in commercialization, indispensable attributes to face the three instigators of the XXI century new economy: The era of knowledge, continuous change and market globalization.

2. Mesoeconomic Competitiveness or at sectoral level requires a new industrial and productive model supported by three fundamental capitals: a) The Organizational Capital that allows to generate the mass economies based on the productive articulation among enterprises through managerial chains; among enterprises of

different sectors that form the productive conglomerates or clusters, and among communities and cities that form the regional development poles. b) The Logistical Capital that allows the development of competitiveness through the integration of integral infrastructure axes in their three dimensions: multimodal transport, telecommunications and energy, c) The Intellectual Capital which is the new competitiveness factor in the knowledge era requires to go beyond the traditional concept of scientific and technological development, to focus this in the systemic creative capacity to promote innovation in the different fields.

3. **Macroeconomic Competitiveness** goes beyond the stabilization of prices and it is manifested in two fundamental areas: The macroeconomic dynamics, i.e., the variables that determine the full and sustained growth in the medium term and the macroeconomic efficiency characterized by the decisive variables in the cost-prices at enterprise levels.

4. International or External Competitiveness refers to the aperture model and the formation of commercial capital. It implies not only agreements of free trade but preventive programs due to very common disloyal competition in the current world and of smuggling which is a self dumping phenomenon that can cancel the Misiones industry competitive growth.

5. **Institutional and Government Competitiveness** refers to the model of government management and rights, that are decisive in the enterprises' competitiveness environment. A government with intelligent quality that provides public services and economic and social development through public effective and efficient policies, in a non de bureaucratic scheme, transparent and that operates with administrative simplification. This is what forms the government capital of a modern society.

6. Political-social Competitiveness level is sustained in the formation of the Social Capital which is trust. An insufficient economic growth, with low capacity for generating productive and well remunerated employments, generates social margination, political uncertainty and governability problems that finally become a vicious circle.

METHODOLOGY

In this research, of quantitative and descriptive type, the gathering of the data was carried out through a semi-structured survey to managers / owners of forest-industry enterprises of the Province of Misiones, Argentina. The sample was of 39 Small and Medium Sized Enterprises. Survey researchers, masters and PhD's from the Faculty of Economic Sciences, belonging to the Misiones National University, worked in the gathering of data, during 2005.

The construction of the instrument for the gathering of data was designed starting off from a matrix that considered the necessary information for the variables and the corresponding operational needs. Variables were identified in enterprises, as in their managers. Among the first: management, productivity, competitiveness, quality, security, legal, ecological or environmental and ethical aspects were considered. Among second those linked to the managers' profile and their appreciations regarding the performance.

The gathering of data was carried out with the purpose of creating a database whose analysis was not completed with the present research work, since it only approaches some aspects of the enterprises for the outlined objectives. The database and later prosecutions were carried out with the statistical program SPSS version 11.5.

CONCLUSIONS

The results obtained in this work were achieved according to the statistical calculations carried out in each one of the built variables starting from the data matrix. Work hypothesis were built that guided the different analyses.

The idea had been posed about the objective of describing the timber Small and Medium Sized Enterprises, of the Province of Misiones, Argentina, which use inputs coming from implanted forests and the derived products, with the purpose of identifying the management variables and their impact in the competitiveness and the managerial productivity, contemplating the strengthening from the inducing aspects to the development process for export and the mitigation of those considered restrictive.

When facing the research it was found out that: there are a diversity of approaches in the ways of defining the "size of the enterprise" according to which entity or author establishes the normative; when the Data Gathering was done among those that showed a certain Profile (for example that "use wood from implanted forests") there appeared those that do not use the supposed inputs, transitorily or permanently; the data given of timber rolls which conform the process "input", what is really processed, which is counted as stock and, finally, what is sold (output), is described, by those interviewed, in different measure units.[1]

The enumerated obstacles, all salvageable ones, show, as so many others, the incipient state of development of the sector in this Province. These make their noxious

[1] It is supposed that for practical measuring reasons, timber is bought per Ton and processed and dispatched in m^3. This last normalized measure, in many timber enterprises, is replaced, very naturally, by square foot (with which the wood is marketed in the deposits and offices of the region). That would not constitute an inconvenience since the coefficient of conversion 1 m3 = 424 square feet, is known by all, as the measuring system in Argentina, since they tried to change it, (even today in the Argentine hardware stores "all" nails, great part of the bolts, brackets and other inputs, are bought in inches). Other distorting factors (if you can call them so) is when, for example, the thickness of **An INCH** has only 20 mm to consider the product "finished" (since it was planed, for example) and due to that it lost more than 5 mm (more than 20%), or when one declares that there enters a quantity of square feet per roll for primary sawing, because the proprietor already knows that, that is what "will remain" as profitable when faced by later processes. The examples mentioned, among other matters, disguise and naturalize the losses, they impede comparisons, etc.

effect when not allowing to make comparisons among enterprises from only one territory, among territories of a region and among regions (to do benchmarking, for example). They contribute in the same way to hinder government authorities' decisions making, since they do not typify the analysis units, they introduce uncertainty in the data in those which are based for action.

Regarding the statistical correlation between the variables "Enterprise Size" and "Preparation for the Domestic Market" with "Foreign Sales" this gave significant values, that is to say that the enterprises that sell abroad are the biggest and those that have approached with success the domestic market. 36% of those that fulfil the requirements for the preparation of the domestic market, export. An important contribution of the work consists in the identification of those that although they carry out activities corresponding to the preparation for the domestic market, but they did not export. There are eleven cases of those that could be able to change this situation in the future.

When the variable "International Channels" was studied we obtained the data that the enterprise that declared to have foreign contacts, also sold abroad.

In general, it would seem that most communicated in Spanish and in second place in Portuguese. On the other hand the export enterprises were those that maintained contact with the enterprises that marketed with foreign countries. Mostly those who sold abroad corresponded to those who spoke a language, different from Spanish.

Diverse indicators allowed affirming that language is an obstacle for communication in business transactions with the foreigners, since very few of those that communicated personally made it in Spanish language and it was not very frequent that they did it through interpreters.

It was proven that only 9 enterprises fulfilled the 3 excellent requirements for the realization of international contacts, these variables were: “communication modality”, “language usage” and “nationality of the enterprise contacted”

It was observed that the 15 enterprises that exported in the last year used external people or middlemen to do the customs paper work for exports, in the smaller ones; they did the paper work themselves. One could notice that the small and medium enterprises went to middlemen. This contrasted with some medium enterprises and all the medium big ones - that did so with external people.

It was observed that 6 enterprises that do not export but contacted foreign enterprises, it could be said that they were potential exporters due to this variable.

One of the built results showed that there were practically no enterprises with high exporter profile, except two enterprises (a small one and a medium one) that were exporting all their production, although in small volumes. The medium-big and big, exported their surpluses they did not figure in the high percentages of committed production for export.

In the analysis of the variable “Domestic Channels” resulted in the fact that the enterprises that had as destination for their products small markets did the distribution in a direct way, on the other hand those that approached the medium markets and the big ones did so using the three resources (“Domestic Commercialization Channels” “Distribution Forms” and “Vehicles that it uses” conveniently reordered) but preferably the direct form, that in turn was a low scale indicator.

Regarding “technology” it was considered that to greater quantity of technological changes, bigger impacts would be achieved and that the same ones obeyed changes of management of the most severe material resources. The enterprises that had bigger quantity of areas with personal computers were those that showed greater quantity of technological changes, likewise those that expressed themselves about the impacts due to those changes. The technological changes were accompanied by the changes of management of the material resources, among them

“elimination of refuse” and “greater use of the inputs”. Approximately 62% had implemented new technology. The reason of the technological change in two cases was only considered due to “Credit Stimulation” it was considered that it could be due to the fear of facing indebtedness, as well as to a reactive attitude. There were 6 cases that declared to be motivated due to obsolescence an by “clients’ requirements” but they did not think of implementing new technologies this year.

Most (1/3 of the sample) were motivated by an external factor such as the “clients’ requirements”.

Most of the worked variables are sufficiently studied in enterprises of the world, but it became necessary to make the report in this context not only to identify them accurately and to prioritize them but to locate in what paradigm were knowledge and beliefs located, with which the managers and or owners act and understand the possible influences that the trans-national enterprises exercise, in an environment like this. With the registered variables, in turn, the indicators of the Small and Medium Sized exporters were compared with those that were not, and the industries that have capacity to export were identified, predicting which are those that can do so, although they have not done it.

Great part of these enterprises have a family profile, with not a very professional domestic management, low production capacity, relatively low productivity, high waste levels, lack of insurance of inputs and a quality appraised by their own criteria, not normalized. All these conclusions, none of them new, show that from the first diagnoses made in the 90’s, nothing has changed in these aspects, save in some punctual technological matters. It has been shown how the competitiveness of the forest and forest-industrial sector was related to some human resources characteristics; nevertheless only three enterprises (33%) declared that they had a Human Resources plan.

With regard to the enterprise strategies and when referring to the competitors, the majority “see” their similar ones, and almost none “see” the multinational one that

produces more than all the "small" ones together and is the owner of a third of what is forested in Misiones, Argentina. This look is reinforced in the description of the strengths and weaknesses, as in the first there appears the product Quality and other tangible aspects when on the other hand we know that only one enterprise, certified quality. In the weaknesses we highlight the lack of being the owner of the forest, and its localization, and contradictions are evidenced towards the answers of the "strengths" that already emphasizes the commented lack of the interviewees', administrative professionalism.

When considering the sequence with which they intend and they orchestrate the strategies, it is observed that there is a clear advantage for the few bigger enterprises interviewed, opposite to the smaller ones, and when wondering what to do so that the numerous small and medium ones can get out of this situation, the almost obvious answer is: by means of association. Nevertheless the great majority (80%) do not know how their colleagues make efficient decisions, which is an indicator of the superficial relationship that exists, which creates a barrier for the integration that is supposed, could be the salvation for the weakest. Happily almost a third of the cases that maximize the arbitrary marks, of the horizontal Integration studied, concentrate on the expressions of the smallest enterprises.

It is reinforced that *integration* can be the salvation for the smallest when one studies the enterprises that have contact abroad, finding as a result that those are the bigger ones, to what is added as a reinforcement, when studying the barriers, that in most of cases shortage is detected in those whose source is “Scale Economies” and its variants (“Cost Reductions”, “Technological Changes” and “Vertical Integration”) and those that go to “Products Differentiation”.

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