
E-commerce em mercados emergentes: fatores para a internacionalização do calçado brasileiro na América do Sul

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Editor Científico: José Edson Lara
Organização Comitê Científico
Double Blind Review pelo SEER/OJS
Recebido em 09.10.2019
Aprovado em 05.12.2019



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Resumo

Objetivo do estudo: O artigo procurou analisar os fatores que afetam as operações internacionais de e-commerce na Argentina, Chile e Colômbia, no caso da indústria brasileira de calçado. Também buscou identificar as barreiras e o nível de controle na internacionalização por e-commerce.

Metodologia/abordagem: Pesquisa qualitativa por meio de entrevistas em profundidade com três especialistas em e-commerce e executivos de três empresas brasileiras de calçados. Estas empresas produzem calçados com suas marcas e comercializam no Brasil por e-commerce, mas exportam regularmente para a Argentina, Chile e Colômbia.

Originalidade/Relevância: Apesar do crescimento do e-commerce nos últimos anos na América do Sul, ainda há poucos estudos sobre o tema na região. No campo de negócios internacionais, há uma necessidade de se compreender as variáveis que estimulam ou impedem a internacionalização de empresas por e-commerce.

Principais resultados: Similaridades de logística, de infraestrutura de telecomunicações, de serviços relacionados, de opções de pagamento eletrônico e a propensão pela compra de calçados brasileiros são fatores externos que influenciam as operações de e-commerce. Contudo, as discrepâncias em relação à legislação local são as principais barreiras para essa atividade nos países analisados.

Contribuições teóricas: Empresas de mercados emergentes tendem a internacionalizar seu e-commerce por meio de estratégias de baixo risco, focando apenas nas atividades de marketing e vendas.

Contribuições para a gestão: A necessidade de um alto nível de controle sobre as atividades comerciais e de gestão da marca no exterior são fatores internos que podem afetar os custos e a velocidade da internacionalização do e-commerce das empresas de calçados brasileiros nos mercados analisados.

Palavras-chave: E-commerce sul-americano, Internacionalização do e-commerce, Internacionalização da indústria calçadista, E-commerce de calçados.

E-commerce in emerging markets: internationalization factors of brazilian footwear in south america

Abstract

Study objectives: This paper aimed to analyze the factors that affect international operations for e-commerce to Argentina, Chile and Colombia, in the case of Brazilian footwear industry. This study also sought to identify the main barriers to the internationalization and level of control required by Brazilian footwear firms into South American markets.

Method/approach: It was conducted a qualitative research with a data collection composed by in-depth interviews with three experts in e-commerce and executives from three Brazilian footwear firms. These firms produce their own branded shoes by e-commerce operations in Brazil and are current exporters to Argentina, Chile and Colombia.

Originality/Relevance: Despite of the significant growth of e-commerce in the recent years in South America, there is still a lack of research related to the topic with a specific focus for this region.

Main results: The findings suggest that the similar logistics and telecommunication infrastructure, the related services, the electronic payment options and the South American

consumer propensity regarding to Brazil shoes are external factors with influence on international operations by e-commerce. However, the discrepancies regarding local legislation are the main barriers for the internationalization of Brazilian footwear e-commerce.

Theoretical contributions: Firms from emerging markets tend to internationalize e-commerce operations through low risk strategies, focusing only on marketing and sales activities.

Managerial contributions: The need for a high level of control on the commercial activities and the brand management abroad are internal factors that can affect costs and pace of Brazilian footwear e-commerce internationalization.

Key-words: South American e-commerce, e-commerce internationalization, footwear industry internationalization, footwear e-commerce.

E-commerce en mercados emergentes: factores de la internalización del calzado brasileño en america del sur

Resúmen

Objetivos del estudio: El paper buscó analizar los factores que afectan las operaciones internacionales de e-commerce en Argentina, Chile y Colombia, para el caso de la industria brasileña de calzado. También identificó las barreras y el nivel de control en la internacionalización por e-commerce.

Metodología/abordaje: Investigación cualitativa haciendo uso de entrevistas especializadas a tres expertos en e-commerce y ejecutivos de tres empresas brasileñas de calzados. Estas empresas producen calzados con sus marcas y comercializan en Brasil por e-commerce, pero exportan regularmente para Argentina, Chile y Colombia.

Originalidad/Relevancia: A pesar del crecimiento del e-commerce en los últimos años en Sudamérica, todavía hay pocos estudios acerca de esa temática en la región. En el área de negocios internacionales, existe la necesidad de comprender las variables que estimulan o impiden la internacionalización de las empresas por e-commerce.

Principales resultados: Similaridades de logística, de infraestructura de telecomunicaciones, de servicios relacionados, de opciones de pago electrónico y la propensión por la compra de calzados brasileños son factores externos que influyen las operaciones de e-commerce. Sin embargo, las discrepancias acerca de la legislación local son las principales barreras para esa actividad en los países analizados.

Contribuciones teóricas: Empresas de mercados emergentes tienden a internacionalizar su e-commerce por medio de estrategias de bajo riesgo, enfocándose solamente en actividades de marketing y ventas.

Contribución para la gestión: La necesidad de un alto nivel de control sobre las actividades comerciales y de gestión de la marca en el exterior son factores internos que pueden afectar los costos y la velocidad de la internacionalización del e-commerce de las empresas de calzados brasileños en los mercados analizados.

Palabras-clave: E-commerce sudamericano, Internacionalización de e-commerce, Internacionalización de la industria calzadista, E-commerce de calzados.

1. Introduction

The diffusion of the internet and the consequent growth of e-commerce worldwide have changed the way of doing business in recent years, expanding the internationalization possibilities for many companies and demanding new business models and paradigms (Chrysostome & Rosson, 2009; Ekeledo & Sivakumar, 2004;). At the same time, several authors advocate that e-commerce enhances internationalization due to low operating costs, elimination of intermediaries and reduction of physical barriers (Luo *et al.*, 2005; Molla & Licker, 2005). According to Kshetri (2007), these characteristics have the potential of generating greater value for companies from developing countries than developed countries. The result is more companies competing at similar levels, increasing the competitiveness of the global market (Nagle, 2001; Chrysostome & Rosson, 2009).

The presence of e-commerce in developing countries is the subject of several studies in the academic field (Dada, 2006; Jamali *et al.*, 2015; Kshetri, 2007; Travica, 2002), as well as e-commerce as a driver of internationalization (Gregory *et al.*, 2007; Luo *et al.*, 2005). However, even with the significant growth of e-commerce in recent years in South America, there is still a lack of research related to the topic with a specific focus for this region (Emarketer, 2015; Meola, 2016; Paul, 2019). In 2015 and 2016, according to Ebit (2017), the Brazilian e-commerce sector registered a 22.4% increase compared to a 10% drop in physical retail sales.

The category of fashion and accessories, which integrates footwear, emerges as leader in number of orders being the sixth place in sales in purchases made by the internet in Brazil (Ebit, 2017). This is not surprising: Brazil is the fourth largest consumer of footwear in the world and the third largest producer on the planet (ABICALÇADOS, 2016). That is, the Brazilian vocation for the production and sale of footwear may be reflected in the behavior of its online consumer.

Meanwhile, the e-commerce market in South America is led by Brazil, with sales reaching USD 12.5 billion in 2015 (Ebit, 2017), followed by Argentina, Chile and Colombia. These three countries added together sales of USD 10 billion in the same year (Cace, 2016; CCS; 2016; Dinero, 2016). Corroborating the attractiveness of the South American market, several Brazilian e-commerce companies have already shown interest in expanding their business outside Brazil (Valim, 2017; Wakai, 2016). The business literature also highlights the potential of this model for internationalization (Chrysostome & Rosson, 2009; Luo *et al.*, 2005).

However, it is necessary to understand the factors that influence the execution of an e-commerce operation of Brazilian companies in South American markets.

Thus, this study aimed to analyze the factors, both internal and external, to Brazilian footwear companies, which influence the execution of e-commerce operations in South American countries. So, it was studied the main South American destinations of Brazilian footwear: Argentina, Chile and Colombia (ABICALÇADOS, 2016; Kaplan, 2017). In addition, it was intended to identify the main barriers to the internationalization of an e-commerce operation of the Brazilian footwear industry for Argentina, Chile and Colombia and the levels of control that a company would need to have on the main aspects of the international e-commerce of footwear. The results of this study are expected to stimulate Brazilian footwear companies to advance in their internationalization process through e-commerce, as well as to provide empirical subsidies to incorporate into the theoretical fields of e-commerce and international business.

2. Theoretical framework

2.1 Factors affecting adoption of e-commerce in developing countries

The recent growth of e-commerce in developing countries indicates that their potential is proportionally higher in these brands than in developed countries (Ahmad *et al.*, 2015; Kshetri, 2007). But the determinants for the adoption of e-commerce in developing countries were identified by Travica in 2002 and later updated in 2007 in a model that mainly analyzes external factors of companies (Alyoubi, 2015; Wresch & Fraser, 2012).

The study of Travica *et al.* (2007) sought to understand what infrastructure conditions are necessary for the e-commerce segment to thrive. The eight factors listed by the author were: logistic infrastructure; logistics services; Internet access; softwares available; level of banking and access to forms of electronic payments; local legislation; education; and consumer propensity to buy online (Sait *et al.*, 2004; Travica, 2002; Travica *et al.*, 2007).

Molla and Licker (2005) proposed another model to understand the internal factors that make the e-commerce business thrive in a country that is still developing in addition to factors external to companies (Dada, 2006; Fathian *et al.*, 2008; Ghobakhloo *et al.*, 2011). The study of Molla and Licker (2005) proposes a convergence between the internal factors of the company, called perceived organization e-readiness (POER), and perceived external e-readiness (PEER). The characteristics that define POER are the awareness of the importance of e-commerce as a business booster, company management commitment, trained human

resources, available technology, risk-taking and governance. While the attributes that characterize PEER are the readiness to adopt e-commerce by the government, the market and the e-commerce support industries (Dada, 2006; Molla & Licker, 2005).

The models of Travica *et al.*(2007) and Molla and Licker (2005) do not appear contradictory, once they are also complementary. Molla and Licker (2005) discuss the convergence between the organizational environment and the market, while Travica *et al.*(2007) propose a deeper look at the external environment. However, neither of them addresses the arrival of a foreign company as a full-fledged or full e-commerce operator in developing countries. Jamali *et al.* (2015) found family orientation and inter-organizational succession as internal factors for e-commerce readiness.

One of the most relevant and fundamental external factors for the development of e-commerce is to have at disposal an adequate logistics system, which is nothing more than the country's road infrastructure, together with carriers with a qualified level of service (Zurek, 2015). This ensures the entrepreneur reduced costs, on-time deliveries, and efficiency improvements that lead to customer satisfaction, improved communication and transparency with the cadence of supplies (Singh, 2014). Many managers reduce the logistics system only to transportation, however, there are several other activities that are essential to ensure efficiency in an e-commerce operation, such as storing, assembling, labeling, among others (Autio & Zander, 2016; Żurek, 2015).

Without a doubt, the success of an e-commerce goes through the efficiency of its logistic operations. However, it is not only up to the entrepreneur to do his / her activities at a high level, it is also necessary that the infrastructure provide the conditions for the system to be competent (Joong-Kun Cho *et al.*, 2008). In developed countries, the main competitive differentials that logistics management can offer are low prices or free shipping, traceability of orders and a reverse logistics system for convenient exchanges and regrets (Nica, 2015; Zurek, 2015).

In addition to logistics, another key factor for the birth of e-commerce is the telecommunications infrastructure that allows the population's access to the Internet. The importance of the internet is so present that the potential of consumers through e-commerce can be measured by the number of internet users in a country (Rajmohan, *et al.*, 2010). The logic is very simple: e-commerce is based on Internet sales, therefore, without access to the Internet, there is no possibility of this business progressing. In this case, there is nothing the entrepreneur

can do to evolve the market. This factor is totally linked to public policies encouraging the spread of internet access.

Consumers in developing countries with a high level of digital inclusion are well informed of the possibilities offered by e-commerce and even overestimate the real impact it can bring to business (Paul, 2019; Ricupero, 2004). On the other hand, e-commerce brings the opportunity for consumers from these countries to access the international market (Molla & Licker, 2005).

It is also fundamental for the development of electronic commerce to have a software industry to support the international systems already available for e-commerce or to have own development of e-commerce platforms integrated to the database electronic payments (Travica *et al.*, 2007). This enabling to provide cyber security while using these systems is also essential to gaining consumer confidence. It is necessary to take into account the level of service, cost of support and previous presence of suppliers in the market in which e-commerce is sought, since these partners will directly affect the results of a virtual retail operation (Molla & Licker, 2005).

In e-commerce, because it is a solitary and virtual experience, there is no human contact during the transaction and, consequently, no opportunity to exchange doubts and arguments in real time. Therefore, it is necessary a high level of security in the data transaction, added to the transparency in the information that the software provides (Singh, 2002). Other delicate issue related to security in e-commerce is the forms of payment. No matter how scientifically and technologically secure the means of payment that a virtual shopkeeper chooses for its business, what matters is the consumer's perception of security about the establishment and the solution chosen (Chellappa & Pavlou, 2002).

In an e-commerce operation, the availability of electronic payment forms is one of the critical points and a basic premise for the development of this business (Kim *et al.*, 2010). Access to credit and the level of banking of consumers are also points that must be analyzed. Without access to the banking system and the availability of credit e-commerce consumption is restricted. Also in the context of the e-commerce business there are the laws that govern it, as well as consumer protection rules and taxes. According to Oxley and Yeung (2001), the institutional environment and respect for laws are among the essential points for the development of e-commerce.

The diffusion of e-commerce encounters several legal challenges for its implementation, from validation of documents produced and exchanged electronically, to issues of copyright and trademark. The role of governments in this case should be to provide

adequate conditions for consumers and retailers to promote, to facilitate and to regulate e-commerce and its various requirements (Molla & Licker, 2005; Travica *et al.*, 2007). The combination of all the variables discussed to date reflects the consumer's propensity to conduct transactions over the internet. Although there is a good logistics distribution system, high level of access to the internet, adequate software industry and means of payment that meet the needs of consumers, if there is a lack of consumer confidence, there will be no prosperity for e-commerce. It is also possible to say that this is the highest requirement for development, because if there is consumer confidence and propensity, the market will organize itself to meet this demand (Travica *et al.*, 2007).

2.2 Internationalization of e-commerce operations

Because of the high coverage of the internet, the level of dependence on the physical presence to generate knowledge about a certain target market becomes less and less important (Autio & Zander, 2016). This phenomenon has made e-commerce a viable internationalization alternative for companies around the world (Berry & Brock, 2004; Wymbs, 2000). Over the past few years, a growing number of studies have suggested that the internet and its associated services facilitate access and quality of information about external markets. In the same way, it reduces costs such as customer service and travel due to the fact that physical operations require many resources for spatial distance (Arenius *et al.*, 2006; Brouthers *et al.*, 2015).

The physical barriers that e-commerce companies face to transcend their national borders are inferior to other types of firms, as well as less susceptible to fixed asset costs (Autio & Zander, 2016; Luo *et al.*, 2005). There is also a reduction in the need for intermediaries in the process, increasing business gains and jeopardizing the traditional model, where intermediaries are keys to the success of the business (Javalgi & Ramsey, 2001). However, Brouthers *et al.* (2015) argue that despite the internationalization risks of companies operating on the Internet, companies' biggest concern should be how to replicate their local operation in another market. Even if initial investments and psychic distances are diminished with the internet, there is still a need to acquire new consumers and participate in the local network.

Another factor relevant to e-commerce is its speed of internationalization, discussed in the study of Luo *et al.* (2005) as one of the main differentials of these companies in relation to the others. The results of the research pointed out that the speed of internationalization is not an isolated factor of other competences, such as innovation, marketing and international

experience. These results are supported by the subsequent research by Gregory *et al.* (2007), who assert that the more companies develop their potential, the greater these levels of adaptation, communication efficiency, distribution efficiency and price competitiveness are.

Table 1
Synthesis of Theoretical Framework

Constructs	Understanding of the theme	Main authors
Factors for adoption of e-commerce in developing countries	Factors such as logistics, technological infrastructure, telecommunications and consumer propensity.	Dada (2006); Jamali <i>et al.</i> (2015); Kshetri (2007); Kim <i>et al.</i> (2010); Molla & Licker (2005); Rahayu & Day (2017); Travica (2002); Travica <i>et al.</i> (2007); Zurek (2015).
Internationalization of e-commerce operations	Advantages such as direct access to international consumers with low operating costs and reduction of physical barriers; Identification of the greater internationalization speed for electronic commerce and greater access to and quality of information on external markets.	Autio & Zander (2016); Berry & Brock (2004); Brouthers <i>et al.</i> (2015); Gregory <i>et al.</i> (2007); Javalgi & Ramsey (2001); Luo <i>et al.</i> (2005).

3. Method

The methodological design used for this study is qualitative, exploratory and in-depth interviews as an approach to the data. The study of a qualitative nature is characterized by navigating in the universe of meanings, motives, aspirations, beliefs, values and attitudes, corresponding to a deeper analysis of relations and phenomena that cannot be reduced only to the judgment of variables (Welch & Piekkari, 2017). Although the topic of internationalization of companies is widely discussed in the academic field, few studies contemplate its deepening in e-commerce operations, especially in South America (Ribau *et al.*, 2018).

To achieve the results proposed by this project, it will be necessary to delimit the field of study and the subjects. Since the objectives of the project are around the footwear and e-commerce industry, the selection of the subjects of this study occurred in partnership with the Brazilian Association of the Footwear Industry (ABICALÇADOS), which indicated companies related to the institution, to be interviewed. This procedure is in agreement with Holstein and Gubrium (2005), who suggest to joint groups that have interest in the research to obtain help during the process of data collection and to promote greater support to the researcher.

According to the Sectorial Report of the Footwear Industry (ABICALÇADOS, 2016), Brazil has 7.7 thousand companies focused on shoe manufacturing, while ABICALÇADOS has 157 associates. However, these 157 members represent 70% of the national footwear production (ABICALÇADOS, 2016). In this study 3 executives of footwear firms associated to ABICALÇADOS were interviewed, accomplishing these four criteria: (i) export to Argentina, Chile and Colombia; (ii) e-commerce operation in Brazil; (iii) produce and sell their own branded shoe; (iv) demonstrate real interest in internationalizing their e-commerce operations to South America. In Table 2 they are identified through the code composed by the letter E added to label the name of the company that the interviewee represents, as well as the characterization of each one of these respondents.

Table 2
Brazilian footwear interviewers

Identification code	Description
EBIBI	Director of Retail that has been working for Calçados Bibi for 20 years and for about 10 years has been the manager of the retail area of the company, which is responsible for franchising and e-commerce operations both in Brazil and abroad.
EFIERO	Director of Marketing and founding partner of Fiero Group. The company focuses on winter products and high added value, mainly boots.
EDAKOTA	B2B and B2C E-Commerce Manager at Dakota Calçados, a company founded in 1976 that employs more than 8,000 employees and manufactures more than 1 million pairs of shoes per month.

In addition, this research also sought e-commerce specialists with experience in South American operations and in the footwear segment, as presented in Table 3. The search for the specialists was carried out with the e-commerce promotion agencies of Argentina, Chile, Colombia, and Brazil. This search showed two firms as the biggest e-commerce service providers with operations in these four countries. Additionally, it was interviewed one specialist from Chile.

This research was limited to a total of six interviewees, based on the criterion of saturation or redundancy that, according to Saunders et al (2017), is applied when the informants in question do not bring new contributions to the data collection, having exhausted the subject and brought the precision needed for the qualitative sampling process. The script of interviews was created based on the theoretical reference about the internal and external factors for e-commerce adoption. The average duration of the in-depth interviews was about two hours and sought to identify the interviewees' perception of external factors, transaction costs involved, desired level of control, competitive advantages, business risk, their companies'

readiness to internationalize e-commerce and the main barriers to internationalization of e-commerce.

Table 3

E-commerce expert interviewers

Identification Code	Description
ECSS	Executive Secretary of the Digital Economy Center of the Chamber of Commerce of Santiago (CCS), with over than 10 years of experience in the Chilean digital market.
EINFRACO	Founder and CRO of Infracommerce, the largest service company covering all aspects of an e-commerce operation in Latin America, with offices in Brazil, Mexico, Argentina, Chile and Colombia. The company has more than 800 employees worldwide, serving firms like Ambev, BRFoods, Havaianas, New Balance, Oakley, Rayban and Unilever.
EVTEX	Vice President of VTEX, one of the largest e-commerce platforms in Latin America.

The first in-depth interview was initially applied to an e-commerce expert with large experience in South America. After the first data collection with this interviewee, the interview script was adjusted and improved with the objective of enriching the data to be collected. The in-depth interviews were conducted in person and were recorded, between January and March of 2018, and were later fully transcribed.

The qualitative data analysis technique chosen for this research was the content analysis, which aims to find meaning for the texts acquired during the data collection (Kolbe & Burnett, 1991). For Bardin (2011), the analysis of content increases the chance of discovery and enriches exploratory research, because it seeks to know what lies behind the meaning of words.

Content analysis was developed in three stages. The first, pre-analysis, the preparation of the material for evaluation was carried out. The second was the classification phase when all data was classified according to categories defined as *a priori*, that is, before analysis of the results and based on the objectives of the research and the theoretical framework, and as an emerging category or *a posteriori*. Finally, the third stage was composed by the interpretation of the data. Content analysis takes place through the categorization of words, phrases or paragraphs, and can be defined as the process of grouping data considering the common part between them (Kolbe & Burnett, 1991).

For this research, the initial categories were divided between external factors and internal factors, as presented in Table 4. The categories of internal factors and external factors were created *a priori*. As the approach used was inductive-constructive, during the analysis of the results had emerged the *tropicalization of marketing activities* defined as *a posteriori* or emerging category. The categories of analysis are identified in Table 4.

Table 4
Content Analysis Categories

Categories <i>a priori</i>	Subcategories	Categories <i>a posteriori</i>
Internal Factors	Awareness of the importance of e-commerce as a business enabler	Tropicalization of marketing activities
	Commitment of the company	
	Trained human resources	
	Technology available	
External Factors	Logistics infrastructure and telecommunications	
	Local Legislation	
	Support Services	
	Forms of Electronic Payments	
	Consumer Propensity	

4. Discussion and the analysis of results

4.1 The e-commerce market in South America

The e-commerce in South America is still considered in the early stages of development because of its low representativeness *vis-à-vis* the physical retail when compared to North American and European standards (Ystats, 2017). However, the growth rate for the next few years is expected to be higher than in developed markets, as Internet penetration rates, access to smartphones and Internet payment security are reaching satisfactory levels, as projected by the report Latin America B2C E-Commerce Market 2017, according to YStats (2017).

Argentina has a population of about 44 million inhabitants and it is estimated that 54% of Argentines have already made purchases through the internet. According to Statista (2018), total sales of the e-commerce segment in Argentina reached 5.1 billion dollars, making it the second largest market in this segment in South America, only behind Brazil. Colombia has reached USD 4.2 billion in internet sales in 2016 (Ebanx, 2018). The country has a population of 49 million and 75% of it has bank accounts and access to credit, while only 18% of Colombians have already made purchases online, according to Ebanx (2018). Because of this, according to yStats.com (2017), the annual growth forecast for online sales is over 20% by 2021.

With a total of USD 2.8 billion in internet sales in 2016, Chile ranks fourth on the continent in this indicator (CCS, 2016). According to the E-Commerce Foundation, 36% of

Chileans shop online, spending an average of \$ 692 annually. Internet penetration in the country is 67%, number greater than Brazil, which is 61%.

4.2 External factors for international e-commerce operations

There are several external factors determining the adoption of e-commerce in developing countries (Rahayu & Day, 2017; Travica *et al.*, 2007). Regarding these factors, EVTEX, Vice President for Hispanic Markets at VTEX, one of the largest e-commerce platforms in Latin America, points out that in his evaluation there are four main pillars for e-commerce operations, namely: infrastructure and platform; support services in the areas of marketing, warehousing and logistics; and customer service. In his view, the markets of Chile, Colombia and Argentina are matured in the main themes, but still lack service providers for warehousing and logistics:

If you do an analysis of these four pillars (infrastructure and platform, marketing support services, fulfillment and logistics, and service) you have that both Chile, Colombia, and Argentina already have the maturing of logistics and has matured services of support, but still do not have, for example, many players in what is fulfillment and outsourced logistics, that is, what we call full e-commerce.

EINFRACO, an Infracommerce executive, the largest service company covering all aspects of a Latin American e-commerce operation, with offices in Brazil, Mexico, Argentina, Chile and Colombia, agrees with EVTEX's analysis of the South market and adds that the level of support and logistics services in these countries is in a situation close to that found in Brazil. However, it shows that there is a difference between the cultural level of the consumer between the Colombian market and the others, which is less developed:

Colombia is a little less developed in the cultural part, e-commerce started to get there really, two years ago, three years, so they are still in maturity and should grow a little more than Argentina because of this.

The affirmation of both interviewees is supported by ECCS, Executive Secretary of the Digital Economy Center of the Chamber of Commerce of Santiago (CCS) and illustrated by their opinion that the support services in Chile are absolutely competitive with the other countries:

In support services it is absolutely competitive with other countries. There are many digital marketing agencies, various services, portals, measurement companies. It is a very, very competitive environment.

E-commerce platforms played a subject of high relevance during data collection, as one of the first decisions that a company must make after deciding to internationalize. E-commerce platforms not only include softwares that perform business transactions, they also integrate a collection of systems from supply chain activities to product display, stock control, logistics, electronic payment and customer relationship (Zhonghua & Erfeng, 2010).

In terms of e-commerce platforms, there is a convergence among the interviewees that the VTEX is the main provider of this service in Latin America, although there are other options such as Magento, Shopify, ATG and Demandware. EBIBI, retail manager of Calçados Bibi and EFIERO, founding partner of Fiero Group, also uses the platform and considers that its adaptation to the markets of South America is one of the differentials and facilitators for their companies to plan international expansion. In this sense, to have e-commerce operations in Brazilian shoe market brings certain advantage in the internationalization process because the software support services partners directly affect the results of a virtual retail operation abroad (Molla & Licker, 2005).

With regard to electronic payment methods, their availability is one of the basic assumptions and critical points for the development of e-commerce operations, as well as their security (Chelappa & Pavlou, 2002; Kim *et al.*, 2010). For those interviewed, the availability of forms of payment and security in the Hispanic countries of South America is no different than Brazil. EFIERO points out that "the payment model and level of service are very similar to Brazil" and EBIBI, EVTEX and EINFRAÇO agree with this evaluation. However, Chile has a peculiarity. As pointed out by ECCS, this service is centralized in the hands of an absolute market leader, making the level of service not the most appropriate: "In Chile there is a kind of Transbank monopoly to operate the means of payment, then it is a subject that complicates in some moments".

EVTEX corroborates that in Chile there is only one supplier and adds that because of this monopoly, the approval rate of electronic transactions in Chile is 40%, while in Argentina and Colombia the approval rate is close to 80%. However, to overcome this problem, the Chilean market developed an electronic payment solution similar to the Brazilian bank slip, according to ECCS and EINFRAÇO. Also in this area, having a support software that helps prevent fraud is a good point in the South American e-commerce market, according to EVTEX "there are many suppliers like Mercado Pago and Pay U, which have solutions, but there are now Cyber Sus ". EINFRAÇO states that this subject is mature for the countries concerned.

Another important factor for the development of an e-commerce operation in South America is the need to respect local legislations and institutional environments that, according to Travica *et al.*(2007), present several challenges for its practice (Oxley & Yeung, 2001). Asked what would be the main barriers to implementation of e-commerce operations outside Brazil, EINFRACO highlights the local legislation of each country as the main obstacle:

Legislation is completely different, when you take Argentina, Colombia and Brazil, there are three completely different realities. When you go to pick up a bookkeeping company, you can't have one for the three countries because each country has its specifics.

EBIBI and EDAKOTA, the executives responsible for Bibi and Dakota Calçados' e-commerce operation, respectively, agree that many barriers are encountered in tax matters, particularly in the tax side. EFIERO also emphasizes that among the main obstacles encountered, taxation and taxes are included, and also adds the customs problems in the transfer of goods from Brazil to Argentina:

The biggest challenge between Brazil and Argentina is undoubtedly the customs factors of cargo approval. It is not possible for a product to stand still for 4, 5 months until it actually enters Argentina and can be marketed.

This type of barrier, according to the interviewees, is one of the determining factors for the choice of entry mode. As already presented during the theoretical, the decision of the mode to enter in a country has a long-term impact on the company, once it is put into practice it is difficult to change. Still according to the bibliographic reference, there are two categories of entry modes being one with shareholding in the international operation, such as subsidiaries, acquisitions, joint ventures and others.

Table 5

External factors of e-commerce operations in South America

Factor	Summary	Evidences
Logistics infrastructure and telecommunications	The theme of logistics and telecommunications is well developed in these countries, with levels of development similar to that of the Brazilian market.	EVTEX: "... you have that both Chile, Colombia, and Argentina already have the maturing of logistics ..."
Local Legislation	The main obstacle was internationalization through e-commerce due to the complexity and lack of homogeneity between countries.	EINFRACO: "Legislation is completely different, when you take Argentina, Colombia and Brazil, they are three completely different realities."
Support Services	Services available such as e-commerce platforms, support software and digital marketing and logistics are at a level close to Brazilian standards.	ECCS: "In support services is absolutely competitive with other countries. There are many digital marketing agencies, various services, portals, measurement companies, it is very, very competitive."
Forms of Electronic Payments	Despite the wide offer of means of payment in Colombia and Argentina, Chile has a great market leader that offers services to an unsatisfactory level.	ECCS: "In Chile there is a kind of Transbank monopoly to operate the means of payment, then it is a topic that complicates in some moments ..."
Consumer Propensity	Argentina and Chile have a consumer market prone and accustomed to buying online. In Colombia there is a tendency, but the culture of digital consumption is still evolving.	EINFRACO: "Colombia is a little less developed in the cultural part, e-commerce started to get there really, two, three years ago."

4.3 Internal factors for international e-commerce operations

From the point of view of the company's internal factors, Molla and Licker (2005) explain that companies, in order to expand their e-commerce operations internationally, need to have convergence between the factors they denominate as readiness for the adoption of e-commerce perceived by the organization. They are aware of the importance of e-commerce as a business driver, the commitment of the company's management, human resources, available technology, risk-taking and governance.

During the data collection process, it was possible to notice that the footwear companies interviewed were aware that e-commerce is one of the main means of their business being leveraged, as well as the involvement of the company's management. This is evidenced by the fact that only top-level managers participated in data collection.

The human resources available in Brazil, according to the interviewees, respond very well to the needs of their operation. However, EINFRACO warns that it has suffered much from the human resources issue in its previous internationalization processes:

We could not hire. We have hired 80 employees in a year. From those 80 we only have three. There is a high turnover due to the lack labor skills. We had to send a lot of people from Brazil to international operations.

Under the technological aspect, as mentioned previously, there are several companies that provide e-commerce platform services as well as various support services. The main e-commerce platform of the market, inclusive, is a Brazilian company widely used by the footwear market and has solutions for the countries of Colombia, Chile and Argentina (VTEX, 2017).

With respect to risk tolerance, by the inclination of the footwear industries to the cooperative models, which according to Morschett *et al.* (2010) are more conservative when it comes to risk, it is possible to interpret that footwear companies have a low tolerance to risk. However, they have enough tolerance to accept the risk of internationalization. On the other hand, EVTEX warns about a possible fragility of Brazilian companies. The fact that it is the largest country on the continent in terms of territory, economy and population may make other markets seem uninteresting:

The main barrier is Brazil. The problem for all Brazilians is to leave Brazil, because Brazil is very big and all markets outside Brazil have little volume and multiple complexities. Then you have to do a medium and long term strategy to make volume.

For EINFRAÇO, the fragility of Brazilian companies lies in their ability to adapt to the needs of international markets. According to the interviewee, Brazilian companies are not born with a global head and when they decide to expand internationally they end up learning much more than expected because of lack of preparation. This last EINFRAÇO statement is corroborated by EVTEX, who argues that it is necessary to adapt the national operation to the local target market, requiring investment, time and effort:

Another problem that Brazil has to get out of Brazil is what I call global thinking and local action. You have to tropicalize, you have to adapt the operation to the local market. And that adaptation needs more than money, it needs time. Time and effort. It is not a problem of e-commerce only. It is a problem of Brazil.

The debate over the adaptation versus standardization of marketing activity during internationalization processes has existed for long time (see Levitt, 1983), when standardization of communication has become a necessity for companies to boost their exports and minimize costs. However, the evolution of the markets and the demand of the consumer made the view

only on cost minimization reviewed by the companies and the adaptation of the marketing activity gained strength (Vrontis *et al.*, 2009).

According to EVTEX, there is no doubt about how to operate. For he, it is necessary to adapt with native local team. EVTEX even illustrates saying that a Brazilian e-commerce abroad may work, but at some point it will lack knowledge of the local culture:

To do e-commerce in Latin America, you have to tropicalize. If you think why VTEX succeeds outside of Brazil it is because it thinks global and acts locally. You have local equipment, you need to have local equipment, at some point you need ... the Brazilian working in Colombia serves, but not for all the time. You need to have local equipment.

The vision of EVTEX is supported by Singh *et al.* (2005), which indicates that there are difficulties in using a standardization approach due to cultural differences between countries and even between regions within the same countries. Dimitrova and Rosenbloom (2010) also argue that cultural distance could create a barrier to a standardized channel strategy in global markets, that seems to be the case in South American countries and in others emerging markets (Paul, 2019).

However, adapting all marketing activity in a Brazilian e-commerce operation to South America is not an option for one footwear executive interviewed. EFIERO comments that he intends to execute marketing activity from Brazil, but using the knowledge of native professionals of the target country to adapt the material:

Work uniquely on campaign templates and promotions among all countries, only tailoring actions to the local culture. Hire native professionals from the target country to translate the material, making the operation communicate clearly with the country where the operation exists.

In agreement with EFIERO, EBIBI adds that its idea is to follow the strategy used by the company in its franchise segment, where the matrix determines a commercial calendar and provides the basic graphic materials, leaving the partner or international subsidiary to adapt the language. Without being radical, EBIBI still comments that there will certainly be adaptations in the calendar of each region, but that everything should pass through the sieve of the Brazilian matrix.

Their opinion is supported by several authors (Paul, 2019; Schmid & Kotulla, 2011) who emphasize the need for a balance and the non-exclusion of standardization and adaptation within the same strategy. The research of Vrontis *et al.* (2009) concluded that companies should

standardize their activities when possible and adapt only when necessary, which differs from the idea of global thinking and local action.

The main argument of the footwear in defending that the marketing activity is as standardized as possible is related to the positioning of its brand abroad. EDAKOTA explains that his biggest concern is with brand identity and the preservation of its essence: “My concerns would be with the brand. Be careful with the brand, you cannot forego presenting the brand in a suitable way”.

EFIERO further argues that the perception of the brand by new international consumers is the point that will require greater attention so that the value perceived by it is equivalent in all markets: “Perception of brand value is undoubtedly one of the points that requires more attention, that is, to ensure that the brand has the same perceived value in all countries”. EBIBI also reports that control over brand ownership and communication is essential, especially to avoid mistakes. She exemplifies that “We cannot afford to sell our sneaker to a larger audience for a female audience” in relation to its products aimed at children.

Still in the field of marketing, another relevant factor for an e-commerce operation of the Brazilian footwear industry in South America is the investment in this area. EINFRACO warns that the need for investment in advertising for brands is not yet well known:

When you are a global brand like Havaianas, which is already known, you do not have to make as much investment in marketing because people already know you. When you are a Brazilian brand type, Calçados Bibi, Martinê, Schutz, Arezzo, Lança Perfume, which are very well known here, but only export, you hardly exist.

EBIBI's thinking is similar, however, according to the interviewee, the investment has to be from the local partner who will manage the operation, in a model similar to the one carried out by the company with its franchises in Brazil. For this, the partner must have since the beginning of the operation science that this is a necessary cost for the success of the business:

The idea is to grow through investors. As we have here in Brazil, develop local business plan. This project is like an international e-commerce licensing. We would initially work on a business plan, will have to suddenly predict that in the beginning will need a little more investment in branding.

In this way, it is possible to conclude that the Brazilian footwear companies with the intention to internationalize their e-commerce operations are prepared from the point of view of human resources, commitment of the company's management and technology. However, from the risk-taking point of view, the same cannot be affirmed because they will not give to a

local partner the e-commerce. It can be argued that companies still need to acquire more confidence and experience in order to be able to work alone in internationalization of its e-commerce operations, according with Autio and Zander (2016). With this in mind, Table 6 presents a summary of what emerged in this section of the internal factors analysis of companies. The table is divided by the subcategories *a priori*, as in Table 4, and shows a text about the main points that the data collection helped to elucidate, and presents evidences that illustrate the conclusions.

Table 6

Internal factors of e-commerce operations in South America

Factor	Summary	Evidences
Awareness of the importance of e-commerce as a business enabler	Managers see as a good opportunity for new revenues and strengthening their brands abroad	Managers in charge of e-commerce internationalization projects
Commitment of the company	Satisfactory level of management.	Only top-level managers participated in data collection and had mastery of the topic of e-commerce internationalization.
Trained human resources	Brazilian companies have trained human resources in Brazil. However, they do not have staff abroad.	"We had to send a lot of people from Brazil to international operations."
Technology available	Large range of technology companies available to South America, being the main Brazilian companies or already with consolidated performance in Brazil.	Brazilian e-commerce platform adapted to the markets of Argentina, Chile and Colombia.

5. Discussion and implications

The result of the analysis of the information obtained during the data collection process and its correlation with the findings of the theoretical foundations made it possible to analyze the influence factors in a Brazilian e-commerce operation of the Brazilian footwear industry in South America. From the point of view of the internal factors of the firm readiness, it was possible to verify that Brazilian companies are prepared to internationalize their e-commerce operations with a low risk propensity, in a lean fashion way (Autio & Zander, 2016). But they still focus only on marketing and sales activities, according with other studies in emerging markets (Paul, 2019; Rahayu & Day, 2017).

From the perspective of external factors, it was possible to perceive that the e-commerce market of Argentina, Chile and Colombia has a maturity level similar to the Brazilian market in terms of logistics infrastructure, internet access, available software, access to forms of payments electronic and consumer propensity to buy online. However, the theme of local

legislation has presented itself as a barrier for Brazilian companies, since each country has peculiarities and differences in high degree. It can also be concluded that Brazilian companies cannot renounce control over commercial and brand management, allowing other activities to be delegated to local partners.

In addition, despite the fact that this study has only the Brazilian footwear segment, the results are broad enough to assist other segments of the Brazilian retail industry to internationalize its e-commerce operations to the South American market. Support providers for e-commerce in South America can also take advantage of the analysis of the data collected to understand the perception of the Brazilian market about their level of services and opportunities.

For theoretical purposes, this study can be considered a pioneer in the topic of internationalization of Brazilian e-commerce companies for South America, but confirms some results found in previous research on factors influencing e-commerce operations in other developing countries with regard to external factors, the main ones being: logistics infrastructure; local legislation; support services; electronic payment means; and consumer propensity.

Besides, the indication that human resources, company commitment, available technology and awareness of the importance of e-commerce as being the internal factors of the most relevant companies match previous researches results. Also, during the data analysis, the theme of adaptation versus standardization of marketing activities emerged as a relevant discussion for the internationalization of e-commerce operations of the Brazilian footwear industry.

This study was limited to the analysis of influence factors for the internationalization of Brazilian e-commerce operations only in the footwear industry and only in Argentina, Chile and Colombia. It has also limited itself to interviewing only companies that have an interest in becoming international, since it is not yet known that some shoe manufacturing company in Brazil has already internationalized its e-commerce operation. Therefore, the sample number has been reduced. There was also no comparison with footwear companies from other countries nor with the differences between factors of influence in markets other than South America. Another limitation of the study was the fact that retailers operating in the virtual environment of the target countries of this study were not interviewed.

As a proposition for future studies, it is suggested for a longitudinal study to be carried out to reassess the factors of influence and barriers of Brazilian footwear companies that have actually carried out their internationalization for the South American market, as well as to

compare the results with footwear industries in other countries. In addition, another proposition would be to expand the research object to other segments besides the shoemakers from emerging countries.

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