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Management Department
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Brazilian Citizen, U.S. Permanent Resident

Education

London Business School, University of London

Ph.D. in Strategic and International Management, 2008

London Business School, University of London

M.Res. (Master of Research) in Business and Management, 2005

COPPEAD, Graduate School of Business Administration, Federal University of Rio de Janeiro (UFRJ)

M.Sc. in Business Administration, 2000

Exchange MBA student, Anderson School, University of California at Los Angeles (UCLA)

Faculdade Nacional de Direito, Law School, Federal University of Rio de Janeiro (UFRJ)

LL.B – Bachelor of Laws (JD equivalent), *cum laude*, 1995

Academic Employment History

University of Pennsylvania, The Wharton School

Assistant Professor of Management, 2008 – present

London School of Economics and Political Science (LSE)

Fellow, Department of Management, 2006-2007

Harvard University, Graduate School of Business Administration

Senior Researcher and Case Writer, Latin America Research Center, 2000-2002

Research and Teaching Interests

Global knowledge sourcing, multinational management, knowledge sharing processes, global innovation management, emerging markets multinationals, field research methods

Publications

A. Articles Published in Referred Journals

[1] Monteiro, L.F., Arvidsson, N., Birkinshaw, J. 2008. Knowledge Flows within Multinational Corporations: Explaining Subsidiary Isolation and its Performance Implications. *Organization Science*, 19(1), 90-107.

- **Winner, Best Paper Award, Academy of Management (International Management Division)**

B. Articles In Best Paper Proceedings

- [2] Monteiro, L.F.; Mol, M & Birkinshaw, J. 2011. External knowledge access versus knowledge protection: A necessary trade-off in open innovation? Academy of Management Best Paper Proceedings
- [3] Monteiro, L.F., Arvidsson, N., Birkinshaw. 2007. *Intra-firm knowledge flows: explaining subsidiary isolation and its performance implications*, Academy of Management Best Paper Proceedings
- [4] Monteiro, L.F., Arvidsson, N., Birkinshaw. 2004. *Knowledge Flows within Multinational Corporations: Why are Some subsidiaries isolated?*, Academy of Management Best Paper Proceedings

C. Invited Articles In Managerial Journals

- [5] Monteiro, L.F., Arvidsson, N. & Birkinshaw, J. 2008. Being in the Out Crowd: Why Do Some Subsidiaries Become Isolated – And Does It Matter? (Research Brief). Sloan Management Review, 49(2), 13-14.
- [6] Monteiro, L.F. & Sull, D. 2006. How can Emirates Airline maintain profitability while achieving growth? European Business Forum, Issue 23, 59-61.
- [7] Sull, D.; Ghoshal, S. & Monteiro, L.F. 2005. The Hub of the World. Business Strategy Review, Vol.16, 35-40.

D. Case Studies and Teaching Materials

- [8] Monteiro, L.F., Montuori, N. and Pacheco, R. 2012. *EBX: Eike Batista and the 'X' Factor*. Wharton School Case (in preparation)
- [9] Monteiro, L.F, Klueter, T. 2012. Building the Virtual Lab: Global Licensing at Merck. Wharton School Case (in preparation)
- [10] Monteiro, L.F.; Sull, D. 2006. *British Telecom: Bringing External Innovation Inside*, London Business School case CS-07005, ecch case 307-045-1
- [11] Monteiro, L.F. Ghoshal, S.; Gratton, L. 2005. *Royal Bank of Scotland*. London Business School case CS-06-011.
- [12] Monteiro, L.F; Sull, D.; Ghoshal, S. 2005. *Emirates Airlines* London Business School case CS-0513, ecch case 305149-1.
- [13] Applegate, L.; Monteiro, L.F.; Collura, M. 2003. Submarino Teaching Note. Harvard Business School Publishing, TN 5-803-010.
- [14] Applegate, L.; Monteiro, L.F. 2002. *Submarino (B)*. Harvard Business School Publishing, Case 9-803-012.
- [15] Arnold, D.; Herrero, G.; Monteiro, L.F. . 2001. *Elektra*. Harvard Business School Publishing, Case 9-502-039 (also published in Spanish, Harvard Business School Publishing Case, 9-503-S39).
- [16] Bower, J.L.; Monteiro, L.F.; Hout, S. 2001. *Gerdau*. Harvard Business School Publishing, Case 9-302-016.
- [17] Applegate, L; Collura, M.; Monteiro, L.F. 2001. *Submarino: The Challenges of B2C E-commerce in Latin America*. Harvard Business School Publishing, Case 9-801-350.
- [18] Applegate, L.; Monteiro, L.F.; Collura, M. 2001. *Note on E-Commerce in Latin America*. Harvard Business School Publishing, Note 9-801-388.

[19] Ghemawat, P.; Herrero, G. and Monteiro, L.F. 2000. *Embraer: The Global Leader in Regional Jets*. Harvard Business School Publishing, Case 9-701-006.

Working Papers

[20] Monteiro, L.F. 2011. Going Far For Something Close: Unveiling the Initiation of the External Knowledge Sourcing Process”

- **Finalist, Richard Farmer Best Dissertation in International Business Award, Academy of International Business**
- **Finalist, Wiley Blackwell Outstanding Dissertation in Business Policy and Strategy Award, Academy of Management, Business Policy and Strategy Division**
- **Finalist, Barry Richman Best Dissertation in International Business Award, Academy of Management, International Management Division**

[21] Monteiro, L.F.; Mol, M & Birkinshaw, J. 2011. Does Strategic Protection of Knowledge Undermine the Effectiveness of External Knowledge Sourcing?

- **An abridged version of this paper was published at the Academy of Management Best Papers Proceedings, 2011**

[22] Monteiro, L.F. and Birkinshaw, J. 2011. How Do Firms Identify And Make Use Of External Sources Of Knowledge? A Brokerage Process Perspective

- **An earlier version of this paper was Finalist, Temple/Academy of International Business Best Paper Award**

[23] Klueter, T. and Monteiro, L.F. 2011. In Harsh –and Slack Times: How Does Firm Performance Affect the Intensity and the Direction of External Technology Sourcing?

- **Finalist, Best Conference Paper for Practical Implications, Strategic Management Society**
- **Winner, Best Conference PhD Paper Prize, Strategic Management Society**

[24] Klueter, T. and Monteiro, L.F. 2012. No Strings Attached: When Do Firms Benefit from Loosely Coupled Research Partnerships?

Research in Progress

- Monteiro, L.F., Klueter, T. What Factors Drive The Selection Of External Technologies? A Longitudinal Analysis
- Dunlap, D. Monteiro, L.F, Klueter, T. Global Knowledge Sourcing in the Pharmaceutical Industry
- Monteiro, L.F and Meyer, M.W. The Cross Border Transfer of Management Innovations Made in Emerging Markets

Refereed Conference Presentations

- Klueter, T. and Monteiro, L.F., Dunlap, D. 2011. Breadth & Depth: How External Knowledge Sourcing Shapes Innovation Performance
Strategic Management Society Conference, Miami, 2011
- Monteiro, L.F.; Mol, M & Birkinshaw, J. 2010. External knowledge access versus knowledge protection: A necessary trade-off?
Academy of Management Conference, San Antonio, 2011
- Monteiro, L.F. & Meyer, M.W. 2011. Management Innovation Made in China?
Strategic Management Society Special Conference, Rio de Janeiro, 2011
- Monteiro, L.F. 2011. Is God Brazilian: Competition Among Emerging Multinationals from Emerging Economies in the 21st Century
Strategic Management Society Special Conference, Rio de Janeiro, 2011
- Klueter, T and Monteiro, L.F. In Harsh –and Slack Times: How Does Firm Performance Affect the Intensity and the Direction of External Technology Sourcing?
Strategic Management Society, Rome, 2010
Academy of Management conference, San Antonio 2011
- Monteiro, L.F. and Birkinshaw, J., Understanding Boundary Spanning at the Initiation of the External Knowledge Sourcing Process
Academy of International Business conference, Rio de Janeiro, 2010
- Monteiro, L.F. Going Far for Something Close: Explaining Knowledge Stickiness in the Initiation Stage of the External Knowledge Sourcing Process
Academy of Management conference, Chicago, 2009
Academy of International Business conference, San Diego, 2009
- Monteiro, L.F and Birkinshaw, J. Global Sensing: The Internal Challenges of External Knowledge Sourcing
Academy of Management conference, Chicago, 2009
Academy of International Business conference, San Diego, 2009
- Monteiro, L.F. Subsidiary Isolation: The Phenomenon and Its Organizational Implications
Academy of International Business conference, San Diego, 2009
- Monteiro, L.F. Connecting the dots: Uncovering the Technology Scouting Process
European Academy of Management conference, Paris, 2007
Academy of International Business conference, Indianapolis, 2007
Academy of Management conference, Philadelphia, 2007

Strategic Management Society conference, San Diego, 2007

- Monteiro, L.F. Bringing External Innovation Inside

Academy of Management conference, Atlanta, 2006

- Monteiro, L.F., Birkinshaw, J. and Mol, M. External knowledge access versus knowledge protection: a necessary trade-off in open innovation?

European Academy of Management conference, Paris, 2007

Academy of Management conference, Philadelphia, 2007

- Monteiro, L.F., Arvidsson, N., Birkinshaw. Intra-firm knowledge flows: explaining subsidiary isolation and its performance implications

Academy of International Business conference, Beijing, 2006

Academy of Management conference, Philadelphia 2007

Strategic Management Society conference, San Diego, 2007

- Monteiro, L.F. Dominant Logic and Cognitive Dissonance: A Closer Look at a Major Challenge to Open Innovation

Strategic Management Society conference, Orlando, 2005

- Monteiro, L.F., Arvidsson, N., Birkinshaw. Knowledge Flows within Multinational Corporations: Why are Some subsidiaries isolated?

Academy of Management conference, New Orleans, 2004

Invited Presentations

- Harvard Business School, Organizational Behavior group, February 2012
- George Mason University, Center for Global Innovation and Transformation, October 2011
- Harvard Business School, Strategy Conference, November, 2009
- Fox School of Business, Temple University, Department of Strategic Management, September, 2009
- Rutgers Business School, Department of Management and Global Business, February 2008
- Robert H. Smith School of Business, University of Maryland, Management & Organization Dept, February 2008
- The Wharton School, University of Pennsylvania, Management Department, February 2008
- IESE Business School, Strategic Management Department, February 2008
- USC Marshall School of Business, Management & Organization Department, January 2008
- The Paul Merage School of Business, UC Irvine, Strategy Department, January 2008
- INSEAD, Strategy Department, January 2008

- Instituto de Empresa (IE), Strategy Department, December 2007
- ESADE Business School, Business Policy & Entrepreneurship Department, December 2007
- Carroll School of Management, Boston College, Operations & Strategic Management Dept, December 2007
- Catholic University of Portugal (UCP), FCEE, November 2007
- Nova University of Lisbon, Faculdade de Economia, November 2007
- George Washington University, International Business Department, November 2007
- Northeastern University, College of Business Administration, October 2007
- 13th Consortium on Competitiveness and Cooperation (CCC), Ecole Polytechnique Federale de Lausanne (EPFL), Lausanne, Switzerland, May 2006

Academic Honors and Awards

- Finalist, Best Conference Paper for Practical Implications
Strategic Management Society, 2010
- Winner, Best Conference PhD Paper Prize (co-authored with a PhD student)
Strategic Management Society, 2010
- Finalist, Richard Farmer Best Dissertation in International Business Award
Academy of International Business, 2009
- Finalist, Wiley Blackwell Outstanding Dissertation in Business Policy and Strategy Award
Academy of Management, Business Policy and Strategy Division, 2009
- Finalist, Barry Richman Best Dissertation in International Business Award
Academy of Management, International Management Division, 2009
- Finalist, Temple/AIB Best Paper Award
Academy of International Business, 2007 (for best paper across all divisions)
- Winner, Best Paper Award
Academy of Management (International Management Division), 2004

Research Grants & Scholarships

- Claude Marion Endowed Faculty Scholar Award, 2011-2012
- Dean's Research Fund Grant, "The Global Knowledge Sensing Mosaic: Putting External Ideas, Market Opportunities and Internal Needs Together", \$8,000, 2010
- Research Grant, "Knowledge Sharing Strategies from Multinational Corporations in the BRICs", Wharton Global Initiative, \$10,000, 2010
- Research Grant, "In Harsh and Slack Times: How Does Performance Affect the Intensity and the Direction of External Technology Sourcing?", Mack Center for Technological Innovation, Wharton School, \$15,000, 2010

- Penn Lauder CIBER travel grant, University of Pennsylvania, \$1,000, 2010
- Research Grant, “Knowledge Seeking Foreign Direct Investment from the BRIC’s (Brazil, Russia, India and China) Multinationals”, Wharton Global Initiative, \$13,500, 2009
- Research Grant, “External knowledge access versus knowledge protection: A necessary trade-off in open innovation?”, Mack Center for Technological Innovation, Wharton School, \$8,000, 2009
- Penn Lauder CIBER travel grant, University of Pennsylvania, \$800, 2009
- Research Grant, Mack Center for Technological Innovation, Wharton School, \$14,500, 2008
- 5th Year Ghoshal Funding , London Business School, £6,500, 2007
- PhD studentship, Society for the Advancement of Management Studies (UK), £40,000, 2004/2006
- Research Grant, The Advanced Institute of Management Research (AIM), £3,900, 2004
- PhD Studentship, London Business School 2002/2004

Teaching Experience

2009- present **The Wharton School, University of Pennsylvania**

- *Graduate Courses*

MGMT 655- Global Strategic Management (MBA core course), Spring 2009, Spring 2010, Spring 2011, Spring 2012

MGMT 655/LAW 519 – Global Strategic Management (MBA/JD joint degree), Summer 2010, Summer 2011

MGMT 654/655 Competitive Strategy & Global Strategic Management, Lauder Institute (MBA/MA in International Studies joint degree), Spring 2011

MGMT 890 – Managing in Emerging Markets: Energy and Infra-Structure in Brazil (Global Modular course), co-designed and co-taught with Mauro Guillen, January 2011, March 2012

- *Undergraduate Courses*

MGMT 111 – Multinational Management (undergraduate elective), Spring 2010

- *PhD/Faculty Development*

Taught sessions on case writing and international management pedagogy and on process and performance research in international business at PennLauder CIBER Faculty Development Workshop in International Business, 2011, 2012

- *Executive Education*

Academic Director and lecturer on “Strategies for International Expansion”, Strategy and Business Innovation Program for CNI /IEL(Brazil’s National Confederation of Industry), July 2010, June 2011

Academic Director and lecturer on “Global Open Innovation” and “Brazil in the New Global Environment”, Innovation Strategies for New Markets Program for CNI/IEL (Brazil’s National Confederation of Industry), March 2012

Lecturer on “Doing Business in Brazil” for DSM Executive Leadership Program, April 2011, June 2011, April 2012

2005/2007

London School of Economics and Political Science (LSE)

Managerial Economics and Strategy Group, Department of Management

Lecturer (2006/7) and Class Teacher (2005/6)

MN200 - Process of Management (2nd year required undergraduate course)

2004/ 2007

Centre for Management Development at London Business School

Lead Tutor in the open-enrolment executive education course “Developing Strategies for Value Creation”. Tutor in customized strategy courses for British Telecom, EDS, IBM and Microsoft. Lead group discussions and advised participants on projects

2000/2001

Harvard Business School (HBS)

Attended, in two consecutive years, the Colloquium on Participant Centered Learning (CPCL), a two-week faculty training course on the case method teaching and writing

1998/2002

Ibmec Business School, Rio de Janeiro, Brazil

Adjunct Professor (part-time)

Lectured on the 1st year required MBA course on “Change Management” and on the 2nd year MBA course on “Writing Case Studies”. Taught to more than 20 MBA cohorts and received in approximately 90% of them the best rating (Excellent) in the students’ evaluation. Taught in-company executive education courses for major multinational corporations, including Telefonica, Petrobras, Embratel (Telmex) and Oi (Telemar).

Teaching Awards

- Wharton Undergraduate Excellence in Teaching Award, 2011, The Wharton School, Undergraduate Division
- “Goes Above and Beyond the Call of Duty” Teaching Award, The Wharton School, MBA Program
 - o MBA Class 2010
 - o MBA Class 2011
 - o MBA Class 2012

- “Departmental Teaching Award”, Interdisciplinary Institute of Management, London School of Economics and Political Science (LSE), 2006
- Seven teaching awards, Executive MBA Program, Ibmec Business School, Rio de Janeiro, 1998/2002

Professional Service

Editorial Review Board

Journal of International Business Studies (2010-2012)

Revista de Administracao Contemporanea (Brazilian Academy of Management Journal) (2012-present)

Ad hoc reviewer

Management Science

Organization Science

Strategic Management Journal

Global Strategy Journal

Research Policy

California Management Review

Long Range Planning

Academy of Management annual meeting, 2004-2012

Academy of International Business annual meeting, 2005-2012

Strategic Management Society annual meeting, 2008-2012

Grant Proposal Reviewer

Israel Science Foundation (reviewer in the area of international knowledge sourcing)

Conference organization

- Session chair, Academy of Management conference, 2011
- Session chair, Strategic Management Society Special Conference, Rio de Janeiro, 2011
- Organizer and chair of the panel “Global Knowledge Sourcing: Modes, Locations, Processes and Outcomes”, Academy of International Business conference, Rio de Janeiro, 2010
- Faculty Facilitator, Doctoral Consortium, Academy of International Business conference, Rio de Janeiro, 2010
- PDW Chair, “Unveiling the Process of Brokerage for External Talent and Technology”, co-sponsored by the OMT, HR, TIM, BPS divisions, Academy of Management conference, Montreal, 2010
- PDW Chair, “Towards an Integrated View of External Knowledge Sourcing”, co-sponsored by the BPS, TIM, IM, ENT divisions, Academy of Management conference, Montreal, 2010
- Faculty facilitator, BPS Managing Your Dissertation Workshop, Academy of Management conference, Montreal, 2010

- Faculty Facilitator, Doctoral Consortium, International Management Division, Academy of Management conference, Chicago, 2009
- Session Chair, Academy of International Business conference, 2008, 2009, 2010
- PDW Organizer, “Bringing External Innovation Inside”, co-sponsored by the BPS, TIM and IM divisions Academy of Management, Atlanta, 2006
- Organizing committee, London Business School Trans-Atlantic Doctoral conference, 2004-2005

University Service

University of Pennsylvania

- Penn Fullbright Committee, Office of the Vice-Provost for Education, University of Pennsylvania, 2010
- Lauder Graduate Group in International Studies, Lauder Institute, The Wharton School & University of Pennsylvania’s College of Arts & Sciences, 2010-present
- Lecturer on the business environment in Brazil, EMTM’s (Executive Master’s in Technology Management) Global Experience Program, The Wharton School & University of Pennsylvania’s School of Engineering, 2009

The Wharton School, University of Pennsylvania

Committees

- Management Department Seminar Committee (2010-2011)
- Multinational Management Hiring Committee (2009-2010, 2010-2011, 2011-2012)
- Management Department Seminar Review Committee (2009)

Student Advising

- PhD Dissertation Committee- Nan Zhou (graduated in 2011)
- PhD Supervision – Thomas Klueter (expected 2013)
- Independent Study Project supervisor, undergraduate and graduate students - 2010, 2011, 2012
- Field Application Projects, 2010, 2011

Other

- Speaker at Wharton’s Global Alumni Forum, Milan, 2012
- Speaker at Wharton’s Seminar for Business Journalists, 2011
- Facilitator in Wharton’s Teaching Workshop for New Faculty Members, 2010, 2011
- Wharton Latin American Conference, Panel Moderator, 2011
- Faculty Liaison, MBA Classes 2011 and 2012
- Wharton General Management Conference, Panel Moderator, 2009
- Lecturer on the business environment in Brazil, Global Immersion Program, South America, MBA program, 2009, 2010, 2011, 2012
- Part of the planning team for the Wharton Faculty International Seminar in Brazil, 2010

Academic Advisory Boards

Member of the Samsung Advanced Institute of Technology CORE (Collaborative Open Research Experts) Network, 2010-2011

Industry Experience

Banco do Brasil, Investment Bank Division
Senior Analyst, February 1998-December 1999

- Advised foreign and local companies in several privatization processes, notably those of the telecommunication and energy sectors. Managed a private equity fund targeted to invest in infrastructure projects at the Northeast of Brazil.

Banco do Brasil, Asset Management Division
Advisor, July 1995-February 1996

- Provided financial and legal advice to foreign investors willing to invest in Brazil. Advised fund and portfolio managers on foreign investments in Brazil. Structured an offshore fund in the Cayman Islands.

Professional Affiliations

Academy of Management, May 2003-Present
Strategic Management Society, April 2005-Present
Academy of International Business, September 2004-Present
Brazilian Bar Association, 1994-present
Brazilian American Chamber of Commerce, 2010-present

Selected Local and International Media Citations

The Economist.com
FT.Press
New York Times Syndicate
CNN en Español
America Economia.com
Business News Americas
Latin Business Chronicle
Valor Economico (Brazil)
Gazeta Mercantil (Brazil)
Voce S.A. (Brazil)
Exame (Brazil)
O Globo (Brazil)
Knowledge@Wharton
Universia Knowledge@Wharton
The Wharton Journal
Research at Penn
Wharton School Publishing
Daily Pennsylvanian

Languages

Portuguese: Native language
English: Fluent
Spanish: Advanced Knowledge
French: Advanced Knowledge