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Collaborative Practices in Major Brazilian Supply Chains

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COLLABORATIVE PRACTICES IN MAJOR BRAZILIAN SUPPLY CHAINS

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ABSTRACT

The objective is to assess and identify the current status of implementation of collaborative policies by major Brazilian corporate chains. Four main aspects are investigated: adoption of collaborative practices, inter-company and intra-company (among company departments), the strategic importance given to certain collaborative practices and how collaboration is developed or maintained in the Brazilian context. This is the first time that a study of this depth and analytical scope has been conducted in Brazil. Implementation of collaborative movements is still in its beginning, due to the relatively recent opening of the Brazilian economy. This article specifically identifies this process, as well as indicates possible areas of improvement aiming at the maintenance of the competitiveness through consolidated supply chains, both national and international.

INTRODUCTION

The current business environment requires a re-evaluation of strategies that will unequivocally expand the scope of corporate decision-making to a level of commercial relationships that go beyond the boundaries of the corporation. To be competitive requires an understanding of the business in regard to its relationship to one or more supply chains, consisting not only of islands of production, but also of groups of suppliers and consumers. Therefore, success depends directly on the degree of integration among the elements in these chains.

Thus, the main objective of this study is to understand how Brazilian companies are

adapting to this new market configuration through the adoption of collaborative policies with their strategic pool of suppliers. For such, the following four issues are examined: the adoption of collaborative policies, both inter-firm and intra-firm (i.e. among departments of a given company); the strategic importance given to certain collaborative practices, and how such collaboration is developed or maintained in the Brazilian context. The use of multi-functional teams, investments in supply chain management, and values considered within the client-supplier relationships are approached through those four dimensions of analysis. These elements are of utmost importance in understanding the emerging, evolution and maintenance of collaborative gains in developing countries such as Brazil. Lastly, this study discusses ways to encourage the process of adopting collaborative models by companies operating in Brazil.

The following section presents a brief summary of the theoretical concepts that will be involved in this paper, so as to place this discussion of collaborative practices in Brazil in context.

SUPPLY CHAIN MANAGEMENT – THE COLLABORATIVE FOCUS

Strategic management of supply chains is increasingly seen as fundamental to enhance business competitiveness. Basnet et al. present strategic management as a new concept, involving the integration of all the elements which add value in the process of supply, production and distribution – from raw material extraction, through the

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transformation process, and all the way to the end consumer.

The great emphasis on strategic management is the result of an increasing number of options available to companies as they structure their supply chains and logistics operations. As a result of this, what was once regarded as simply an exercise in tactics – purchasing, for example – is now acknowledged to be a strategic function that determines the success or failure of a company (GOFFIN et al.).

The supplier relationship is fundamental to the optimization of supply processes associated with production. Tully (1995, qtd. BASNET et al.) states that, in strategic management of the supply chain, the supplier relationship is rooted in the concepts of Just-in-Time and Lean Management, and on the need to reduce the number of suppliers. Gould emphasizes that the overriding importance of the suppliers' role, which is not merely tactical but also strategic, is the reason behind the significant increase in outsourcing, a development made possible by advances in information technology. Organizations that furnish these services must not be regarded as sub-contractors, but as strategic partners in the value chain.

The literature has stressed the importance of strategic partnerships with suppliers. This new partnership is regarded as having a positive impact on profitability, on reduced ownership and acquisition costs, higher product quality and faster growth in market share (MANSIO).

Thus, the need for continuous improvement and cost reduction has led manufacturing firms to cooperate with their suppliers (MANSIO) in the joint pursuit of common objectives. Mansio has shown that this change in the supplier-manufacturer relationship is a transformation from the traditional relationship with emphasis on low cost to a more cooperative and long-term strategic relationship with a focus on optimizing performance.

However authors differ at the effectiveness of companies in seeking the integration of their supply chains. Some, such as Mansio, stress that most managers still concentrate on short-term cost reduction and that, in fact, reduction in the supplier base rarely occurs. Others, using empirical studies, demonstrate that efforts at supplier reduction are today a business reality. Goffin et al. state that companies are reducing their supplier base in order to obtain large competitive advantages. Such a policy is viewed as necessary for a closer, long-term relationship with suppliers (GOFFIN).

Finally, this closer relationship bears out the search for suppliers who may become strategic partners. And that the Japanese *Kanban* and Just-in-Time models are, for many authors, the basis for the concept of strategic partnership (MANSIO). The use of these models indicates, among other things, a strategy of consolidating long-term relations with fewer suppliers and fostering closer relationships among different organizational areas. They suggest a true partnership, without specifying the domain or the scope of the collaboration.

Hence, a strategic partnership cannot be appraised by using merely the concrete criteria proposed by the models. Deeper aspects involved in the concept of collaboration¹ must also be taken into account, such as: the existence of a bilateral relationship in which there is a commitment to the future, an equitable balance of power, and conflict-solving mechanisms that are created as well as adjusted to meet unforeseen contingencies.

Harrison et al. identify two types of collaboration, namely internal and external. Internal refers to collaboration between different administrative functions within the company (for instance, Logistics and Marketing). Of the two, external collaboration (with suppliers, clients, etc.) is considered to have a greater positive potential.

Considering supplier-selection teams, the study by Pearson et al. confirms an earlier

¹ Collaboration is understood by the authors to be a process in which the partners adopt a high level of cooperation in purchasing, in order to maintain an exchange-type relationship for a certain period of time.

analysis by Carter and Narasimham (1993, qtd. PEARSON et al.), which concluded that, in both large and small companies to the same extent, the selection teams are generally multi-functional. Pearson further concludes that formal, structured processes for operation and management of supplier relationships are seldom used, especially by small companies. This notion supports Goffin's conclusion that, in terms of understanding how widespread a company's actual adoption of strategic outsourcing is, the criteria used by companies are less comprehensive than those found in the literature.

Therefore, efficiency will be critically dependent on alliances created along the entire supply chain. There are, of course, extremely specific corporate macro-trends, characterizing each model of alliances or collaboration in each and every sector of the economy. Nevertheless, in all movements towards the creation of alliances – labeled here “collaborative movements” –, some points can be found in common: trust and confidence, system compatibility, a culture of change, flexibility and long-term commitment. These aspects are precisely those that reinforce the links in the supply chains, and thus constitute the essence of collaborative movements.

Summing up, these aspects taken into account by companies in collaboratively developing their strategic cadre of suppliers in Brazil are the very essence of this paper.

This study is based on a survey that includes the nineteen main industrial sectors in Brazil. As such, it is a far-ranging portrait of modern supply chain management in the country. Details of the survey methodology employed and breakdowns of the sample are explained in the following section.

SURVEY METHODOLOGY AND INDUSTRY PARTICIPATION

The survey questionnaire was designed to cover the main elements of collaborative management in Brazil. Altogether, 1,746 questionnaires, based on classification studies ranking the largest companies operating in Brazil, in terms of their 2003 sales, were sent out. A total of 149 professionals associated with supply chain management answered the survey. Of these, 48.8% represented corporations whose annual sales surpass US\$ 500 million (chart 1).

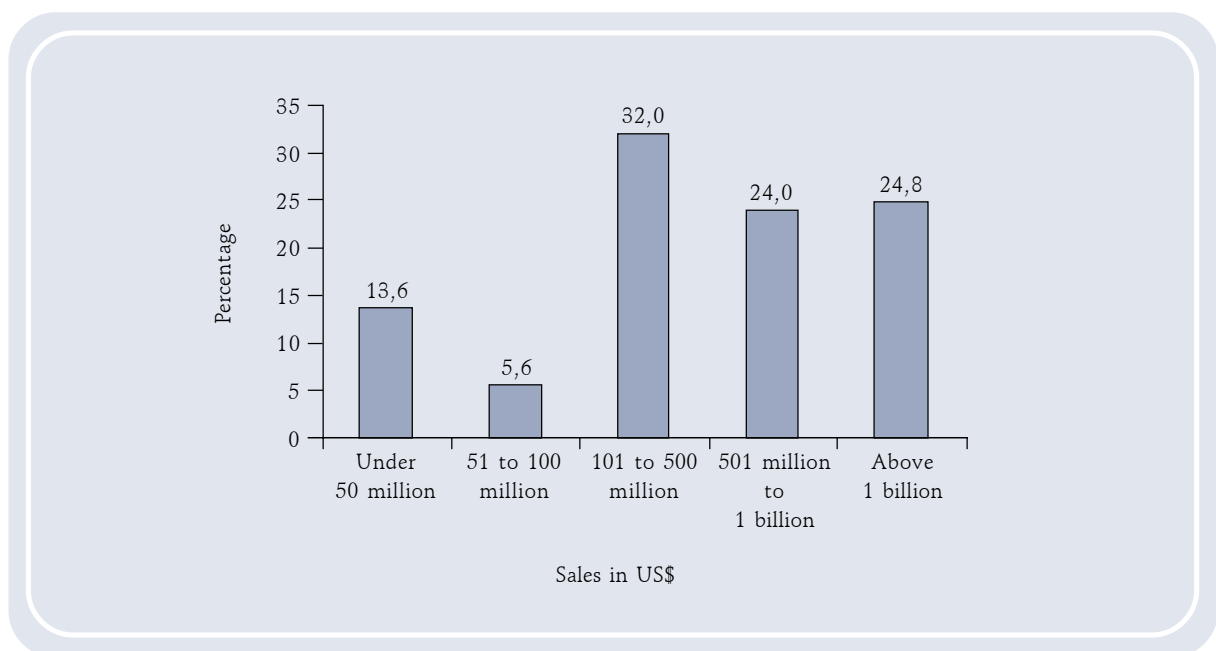


Chart 1 – Sales of the responding companies

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Over half of this percentage (24.8%) is made up of organizations with annual sales in excess of 1 billion dollars. Furthermore, of those companies with sales under US\$ 500 million, more than 60% had yearly sales in the 100 to 500 million dollar range. In terms of Brazilian sales standards, this is a significant sample of the top one thousand companies in Brazil. Logistics (70 = 47%) and purchasing (61 = 40.9%) were the two company departments best represented in the questionnaire (see table 1 below).

TABLE 1 – Functional department of respondents

Functional area	Number of respondents	%
Logistics	70	47,0
Purchasing	61	40,9
Administrative/financial/accounting	6	4,0
Production	6	4,0
Marketing	4	2,7
Others	2	1,4
Total	149	100,0

Basically, the respondents represented three functional levels:

- √ Strategic level: responsible for formulating supply chain policies and guidelines (40%).
- √ Tactical level: responsible for managing the implementation of supply chain policies and guidelines (42%).
- √ Operational level: responsible for implementing and executing tasks/routines associated with supply chain management (chart 2).

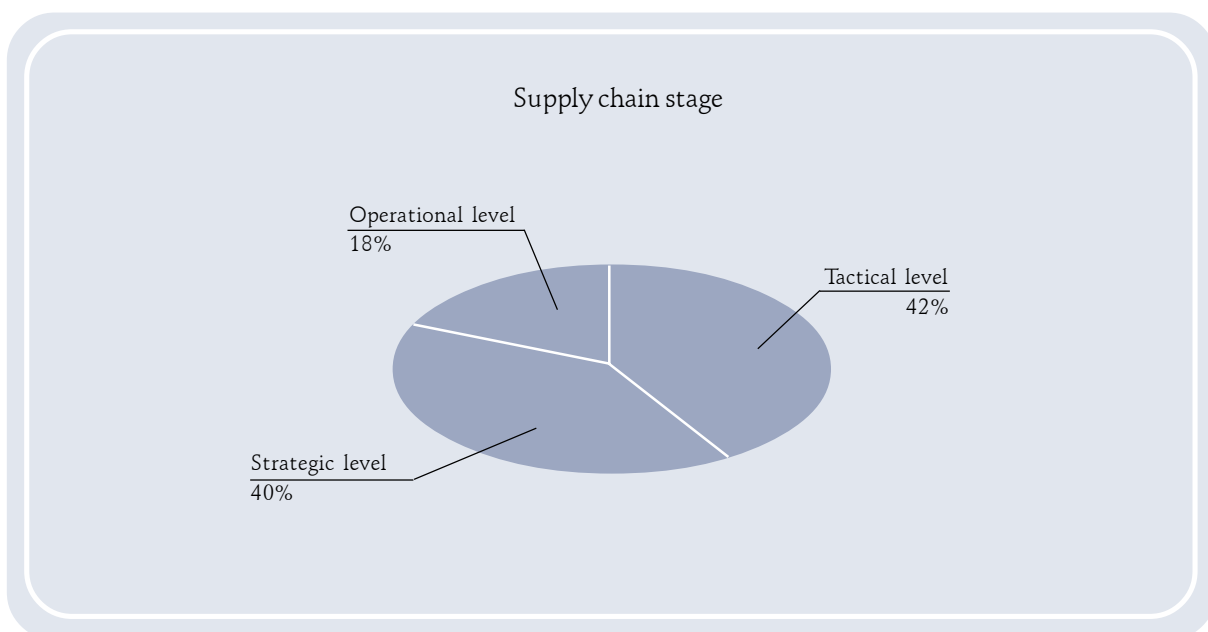


Chart 2 – Supply chain position of respondents

Corporate sectors in the survey were defined so as to include the main industrial sectors in Brazil. There were responses from all 19 sectors surveyed, thus enabling a broad-based analysis of supply chains covering most of Brazil’s productive activity (chart 3).

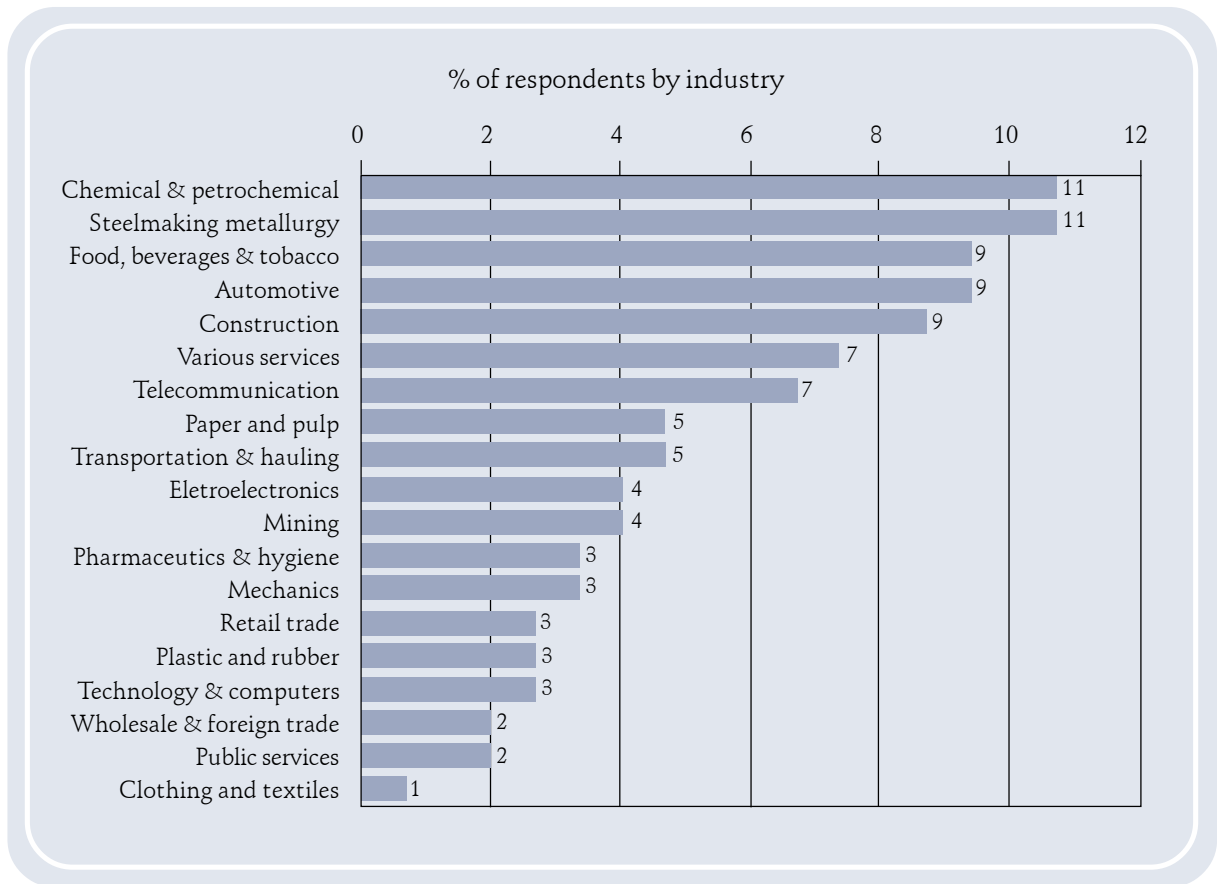


Chart 3 – Industrial sector participation

THE ISSUE OF INTER-COMPANY COLLABORATION

Current state of implementation of collaborative programs with suppliers

Collaborative practices are the current trend in strategic positioning, with a full 34% of the questionnaire respondents having already adopted such practices. A minority of only 26% currently has no plans to do so (chart 4).

Companies currently contemplating the implementation of a collaborative program comprise the largest sample group (38%) and represent the growing trend of collaboration among the major Brazilian supply chains. The simple existence of this transition group may be a strong evidence of the ineffectiveness in maintaining only transactional relations with the supply chain, given the current environment of high corporate competitiveness.

Establishing closer relations among organizations transforms purely market relationships into partnerships. Elements of the corporate culture, such as trust, inter-firm communication, collaboration, and a corporate culture conducive to change, are fundamental in the construction of this new dimension on the supply chain management, a reconfiguration which seeks to obtain strategic and operational gains in efficiency and flexibility (responsiveness). The values associated to the relationships of companies operating in Brazil with their suppliers constitute the next topic for analysis.

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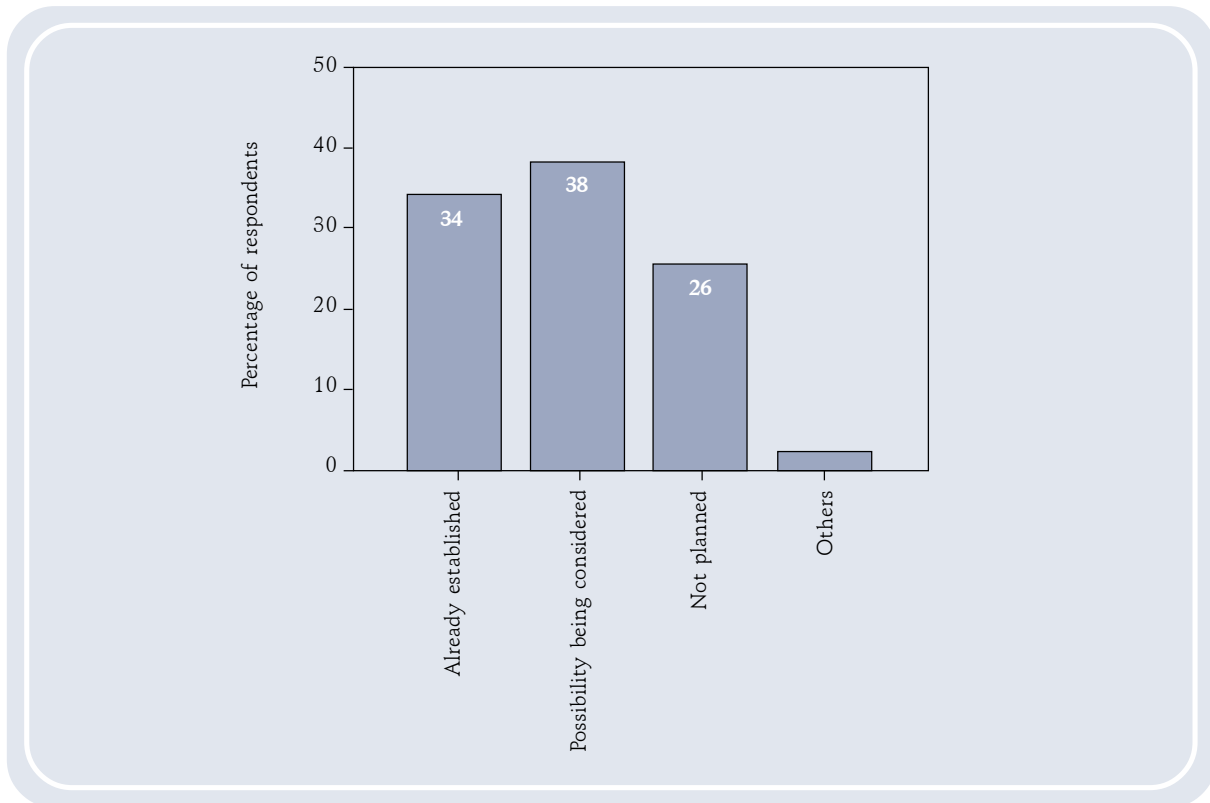


Chart 4 – Implementing a collaborative program

Values associated with company-supplier relationships

“Trust” and “efficiency” were the most highly rated values governing relationships among companies and their suppliers, with 37% of total responses, amounting to a significant 77% of all respondents. Collaboration, quick response, safety and security form the second most valued cluster (14% each). Communication and culture open to change were the least mentioned (18%) (see chart 5).

Establishing a relationship based on trust depends directly on the flow of information, often confidential, among the partners. However, only 46% of the respondents mentioned “Communication” (compared to a high 77% for “Trust”). It must be taken into account that communication is initially a barrier to collaboration, especially given the difficulties to establish environments appropriate for information exchange. Hence, communication has fewer responses in the survey, for reasons more subjective rather than objective.

Nevertheless, a positive appreciation of communications is an area of corporate culture with a great potential for development in Brazil, and one that will probably increase the chances for success of strategies that foster trust and confidence in client - supplier relationships. Similarly, the low value given to culture for change must be stressed. The absence of a pro-active direction in facing the challenges imposed by ever-more-competitive markets poses a serious risk to the operating success of any supply chain. Collaboration is also intrinsically linked to this value. It demands a partnership in which both actors are willing to change and cooperate, in order to attain common goals. A collaborative environment of trust cannot be established unless attitudes that encourage adaptability and the optimization of existing company-supplier relationships exist. In the same way, the various departments of the company must be synchronized so that the general objectives of the organization are aligned with the adopted supply-chain strategy. This aspect of internal collaboration can be easily achieved by the use of multifunction teams in problem solving and in the joint planning of actions.

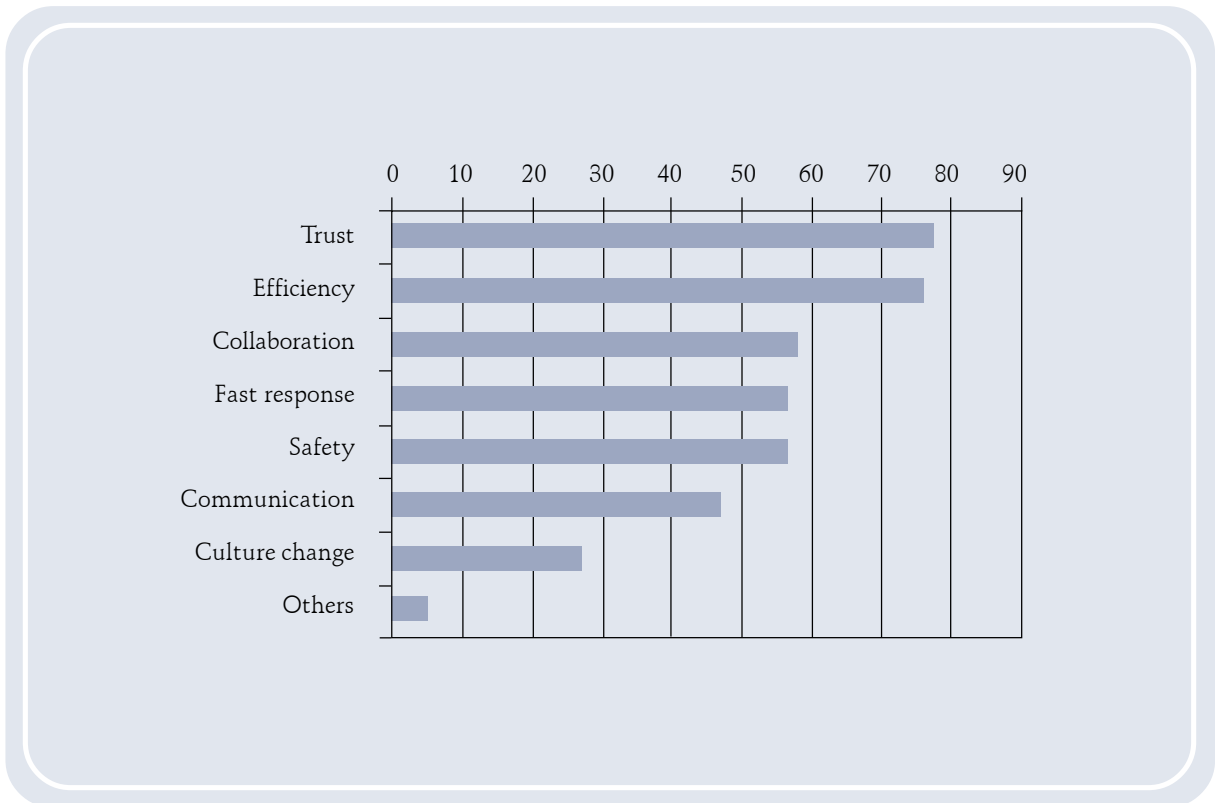


Chart 5 – Values associated with company – supplier relationships

INTRA-COMPANY COLLABORATION – USING MULTI-FUNCTIONAL TEAMS

The use of multi-functional teams to select suppliers and to manage the supply chain facilitates informative and managerial integration, the object of which is to minimize errors or risks caused by a decision which is incompatible or not in alignment with the company strategy.

In a collaborative environment, multifunction teams are extremely important in assuring that the diverse interfaces in the value-added processes are in accord with the activities of each operational area within the company (logistics, marketing, finance, sales, and production, among others). However, the process of establishing multi-disciplinary consensus can be extremely complex. Indeed, it can become an obstacle to streamlined decision-making, thus creating a bottleneck and affecting organizational flexibility. Supplier selection and supply chain management processes are multi-functional for 54% of the survey’s valid respondents (chart 6). 20,5% of the companies only use multi-functional decision-making in supplier selection. Another 11% employ multi-functional teams simply for managing their supply chain. The remaining 14% of the surveyed companies do not use multi-functional teams for either process.

In general, managerial activities in the major Brazilian supply chains are characterized by the use of multi-functional teams. Altogether, 86% of the respondents work in a decision-making environment, incorporating distinct functional areas. Judging from the responses, professionals participating in team formation are mostly employed in the logistics and production departments (a total of 45% of the responses, as shown in table 2).

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TABLE 2 – Functional areas involved

Functional areas involved	Response %	% of respondents
Logistics	26,04	76,26
Production	18,92	55,40
Sales	15,48	45,32
Finance	13,27	38,85
R&D	10,81	31,65
Marketing	7,13	20,86
Human Resources	2,21	6,47
Others	6,14	17,99
Total	100,00	

Base: 139 respondents.

This can be explained by analyzing the risks inherent in supplier selection. Company's productivity is directly affected by problems regarding non-compliance with delivery time-frames or the delivery of sub-standard materials. This creates the rationale for a decision-making process which links technical and operating information on production to create ideal criteria for requirements in supply contracts.

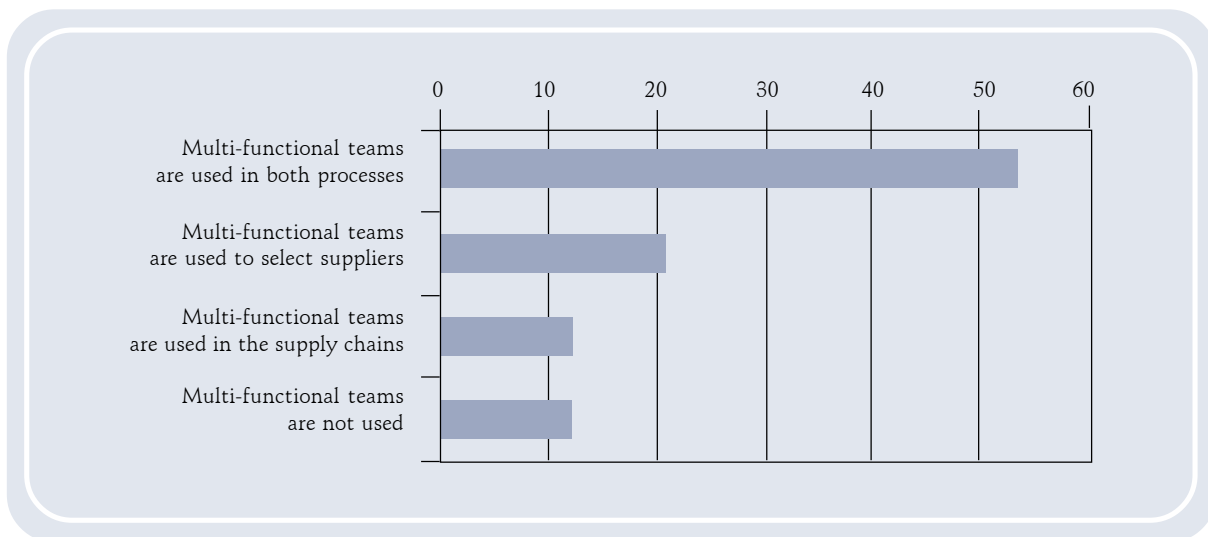


Chart 6 – Supplier selection and supply chain management processes – multi-functionality status

A second set of multi-functional teams is formed by sales (15.5%), finance (13.3%), research and development (11%) and marketing (7.13%). Participation by those areas with a direct interface with clients is high, with marketing and sales contributing with 26%. This group can eventually assist in the strategic structuring of supply and management of the supply chain. For example, a new product launch requires the company as a whole to be fully prepared to meet new potential demand. This, in turn, requires coordination of receiving, production and distribution, so as to assure that there will be no reduction in the added value of the product offered, caused by, as an example, the lack of product in the distribution channels.

Summing up thus far, the initial analysis points to increasing collaboration in the major Brazilian supply chains. Likewise, internal collaboration in structuring and defining strategies linked to supply chain management is also quite widespread. What follows is a discussion of the strategic importance of some specific collaborative practices.

STRATEGIC IMPORTANCE OF COLLABORATIVE PRACTICES

A second investigative stage considered both the concept and the level of commitment to certain collaborative practices in the supply chain. Issues relating to contracting, selecting, evaluating and developing suppliers are analyzed within the collaborative framework, with a solid focus on partnerships. The results are shown in table 3. Responses were made on scale of 1 to 10. “1” indicates low strategic importance, while “10” designates the highest level of strategic importance.

TABLE 3 – Collaborative practices in company-supplier relations

Code	Collaborative practices in company-supplier relations	N	Mean
1	Carry out routine evaluations to ascertain competitiveness in meeting delivery timeframes and product quality.	137	8,27
2	Conduct a preliminary study to assess supplier potential.	139	7,71
3	Draw up contract clauses proposing activities for improved collaboration with supplier.	139	7,60
4	If supplier performance is low, company indicates corrective actions.	136	7,58
5	Include suppliers in the process of developing company products.	138	7,04
6	Include suppliers in the process gradually, through training and exchange of information.	139	6,58
7	Promote regular workshops, for information exchange among the production chain elements.	136	6,19
8	Make teams available to work with local suppliers in problem solving.	136	6,18
9	Develop programs encouraging local suppliers to take on new functions.	134	6,18
10	Develop partnerships with local academic centers, in order to promote supplier improvement.	136	5,99
11	Promote transfer of technological knowledge.	136	5,68
12	Choose to outsource some distribution functions, until the supplier is able to carry them out.	135	5,32
13	Draw up contract restrictions prohibiting suppliers from development of the contracting company's core competences.	134	5,15
14	Carry out regular evaluations, but with differing standards for local suppliers.	135	5,07
15	Create programs with the public sector, aimed at developing local suppliers.	133	4,57

Scale: 1. Of little importance; 10. Extremely important

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The practice labeled “Carry out routine evaluations to ascertain competitiveness in delivery time-frames and in product quality” (code 1) received the highest score. That defined as “Create programs jointly with the public sector, in order to encourage development of local suppliers” (code 15) was pointed to the lowest rating, with an average score of 4.57. For the companies surveyed, it is clear that partnership with the Brazilian government is not a strategy as significant as the assurance provided by routine logistical assessment of supplier’s performance. This demonstrates a lack of confidence in public sector’s organizations as a source of development for suppliers’ logistics skills, probably because such agencies lack the necessary technical knowledge or are hampered by a high level of bureaucracy.

While respondents regard Code 1 as of fundamental strategic importance, they do not seem to consider differentiated evaluation criteria for local suppliers. Indeed, the average obtained for Code 14 “Carry out evaluations but with differing standards for local suppliers” was low (5.07). Thus, any rigorous specific control – it could be better – for local companies in Brazil is unlikely, which could allow their increasing participation in major supply chains.

Another trend in the responses refers to issues in drawing up contracts between companies and their suppliers. Code 3 (“Draw up contract clauses proposing activities for improved collaboration with supplier.”) with an average of 7.60 and Code 13 (“Draw up contract restrictions banning suppliers from developing the same core competences as the contracting company’s’) with a mean value of 5.15 present contrasting averages. In other words, the responses are strategically aligned in terms of the operational and functional development of suppliers, permitting the addition of new functions in the supply chain (contracting company’s core competences), as there is little inclination to impose contractual restrictions against it.

This tendency is confirmed by the 7.04 average obtained for Code 5 (“Include suppliers in the process of developing company’s products”).

Joint R & D development is deemed to be strategically important, reinforcing the potential for acceptance and success of collaborative programs which encourage the adoption of practices aimed at continuously improving the supplier’s repertoire of competencies. On the other hand, respondents do not widely employ collaborative practices when developing joint solutions to supply chain problems. For instance, Code 4 (“Point out corrective actions for low supplier performance”) with an average score of 7.58 is preferred over Code 8 (“Make teams available to work with local suppliers in problem solving”) with a score of 6.18. A short-term mentality characterizes the search for solutions to problems in the supply chain, something that goes against the long-term character of traditional collaborative partnerships. It can also be inferred that pointing to corrective actions requires less corporate and financial effort, as compared to the deployment of joint company-supplier work teams.

Generally, the analyzed collaborative practices reflect the growth of increasing inter-company collaboration in Brazil. Some basic foundations of supply chain collaboration (joint product development, absence of clauses inhibiting supplier growth, routine performance-control evaluations, etc.) are deemed by companies to be of high strategic importance. However, certain practices that guarantee the long-term maintenance and development are necessary to consolidate the growth of collaborative models. Among these are investments, supplier follow-up, and a strategy to structure the supplier base. These issues are discussed in the following section.

DEVELOPING AND MAINTAINING THE SUPPLY CHAIN – THE COLLABORATIVE FOCUS

Continuous follow-up of suppliers

In section 6, Code 1 (“Carry out routine evaluations to ascertain competitiveness in meeting delivery deadlines and in product quality.” – see table 3) was the main collaborative practice, earning the highest

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number of responses (8.27). Thus, the result of 77% for companies in chart 7 (“continuous follow-up of suppliers”) corroborates the importance given to this practice in Brazil. A mere 20% of the respondents conduct only initial follow-ups. A negligible 3% of the participants do not have any kind of supplier follow-up.

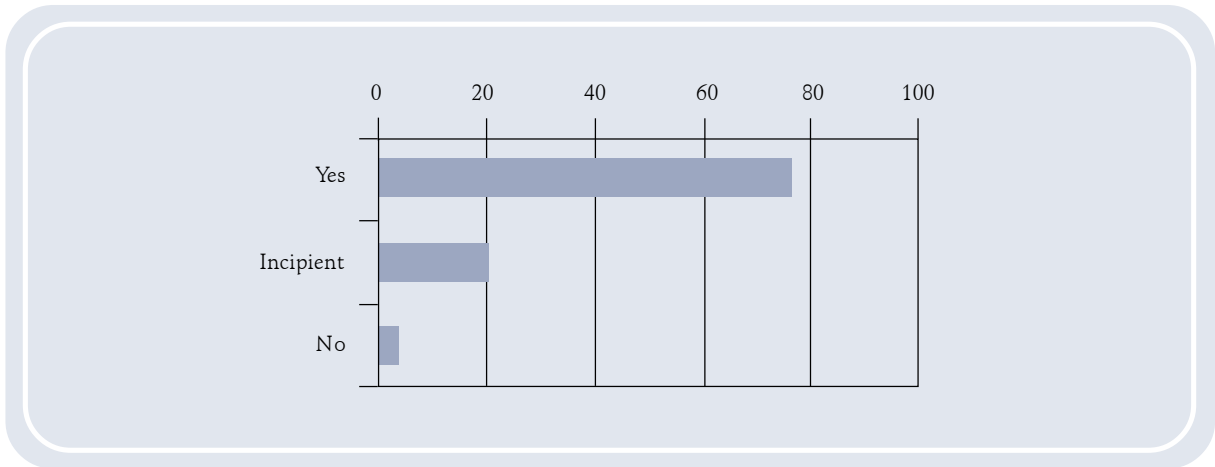


Chart 7 – Continuous supplier follow-up

Procedures to monitor suppliers are analyzed in the following section, with an emphasis on long-term maintenance of collaboration. As table 4 shows, 29.68% of all respondents formalize processes and procedures to monitor and manage the supply chain, thus creating a basis for developing suppliers in an orderly, organized and efficient manner.

TABLE 4 – Procedures for supplier follow-up

Procedures for supplier follow-up	Citation %	% of respondents
Establish and maintain performance standards	30,00	69,40
Formalize processes and procedures	29,68	68,66
Schedule regular operational reviews	25,16	58,21
Involve suppliers in planning	15,16	35,07
Total	100,00	

Base: 134 respondents.

Establishing and maintaining performance standards (30% of all responses, a percentage similar to that of the previous item) ensures the feasibility of routine evaluations to ascertain competitiveness in terms of delivery deadlines and of product quality. What is not measured cannot be controlled. The alignment of the above responses simply corroborates the concept of establishing processes and controls. Lastly, the regular scheduling of operational reviews clearly points to the preoccupation of companies with monitoring the evolving supply process. Taking into account all these aspects, one can state that there exists a collaborative monitoring structure with suppliers. In further analyzing the development and maintenance of Brazilian supply chains, the investment policies adopted were also studied. Investments in supply chain management allow a strategic and operational optimization of the logistics structure over the long term. In other words, such investments provide information about the potential growth of the leading Brazilian supply chains and in what direction this is going.

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Investing in supply chain transformation or modernization

Most companies make medium and large-scale investments (50%). Small-scale investments amount to 25% of the valid sample (see table 5). Approximately 24% of the companies have not adopted a strategy of investing in the supply chain. There is a recent trend towards further investments in information exchange, from which one can infer the use of information technology in the supply chain management dimension (table 6).

TABLE 5 – Investments in transforming and modernizing the supply chain

The company is investing in transforming/modernizing the supply chain	Number of respondents	%	Valid %
Yes, it is making medium-scale investments	48	32,21	34,04
Yes, it is making small-scale investments	36	24,16	25,53
Yes, it is making large-scale investments	23	15,44	16,31
No, but it is considering making investments	18	12,08	12,77
No	16	10,74	11,35
Total	141	94,63	100,00
No information	8	5,37	
Total	149	100,00	

TABLE 6 – Areas of current investments

Areas for current investments	Citation %	% of respondents
Greater information exchange	26,90	67,46
Selecting more technologically capable suppliers	20,25	50,79
Formalizing a selection process	18,67	46,83
Preference for local suppliers	14,56	36,51
Supplier enablement	12,66	31,75
Creating credit lines for suppliers	1,26	3,17
Others	5,70	14,29
Total	100,00	

Base: 126 respondents.

The positive effects of an intensive use of a wider-ranging information flow are mainly felt in companies' inventory management. Inventories tend to be reduced, as data on actual consumption by the end customers become more readily available. In the future, hopefully, this will eliminate the distortions caused by the drive for economies of scale (bullwhip effect), with its consequent low performance and high degree of speculation in the management of inter-company materials.

For such a strategy to succeed, the supplier must have compatible technology (as seen in Table 6, this represents 20.25% of investments.) This explains the increasing importance of information management in the building and structuring of the supply chains of the major Brazilian companies. Other analyzed elements also point towards a tendency to invest in formalizing the process of supplier selection (18.67%), in supplier enablement, and in preferential policies for local suppliers (27%). A significant portion of the sample, between 30% and 40% of the respondents, indicate that their companies are currently investing in these two areas.

Investments in the development of a supplier base are not sufficient to ensure its optimal performance. Corporate strategy directly influences the structural and operating success of a supplier base. As an example, companies using a lean production system generally favor partnerships with fewer suppliers, in order to ensure greater control over qualitative variability and the supply process. The final topic shown in this study deals with strategic positioning in the management of the supplier pool, as it relates to the growth of collaborative practices in Brazil.

Company's practices with regard to its supplier base

A significant majority (75.5%) of companies shown in Chart 8 has already established or is in the process of cutting back to a more restricted supplier base. Only a small percentage (23%) of the corporate sample still maintains a large supplier base.

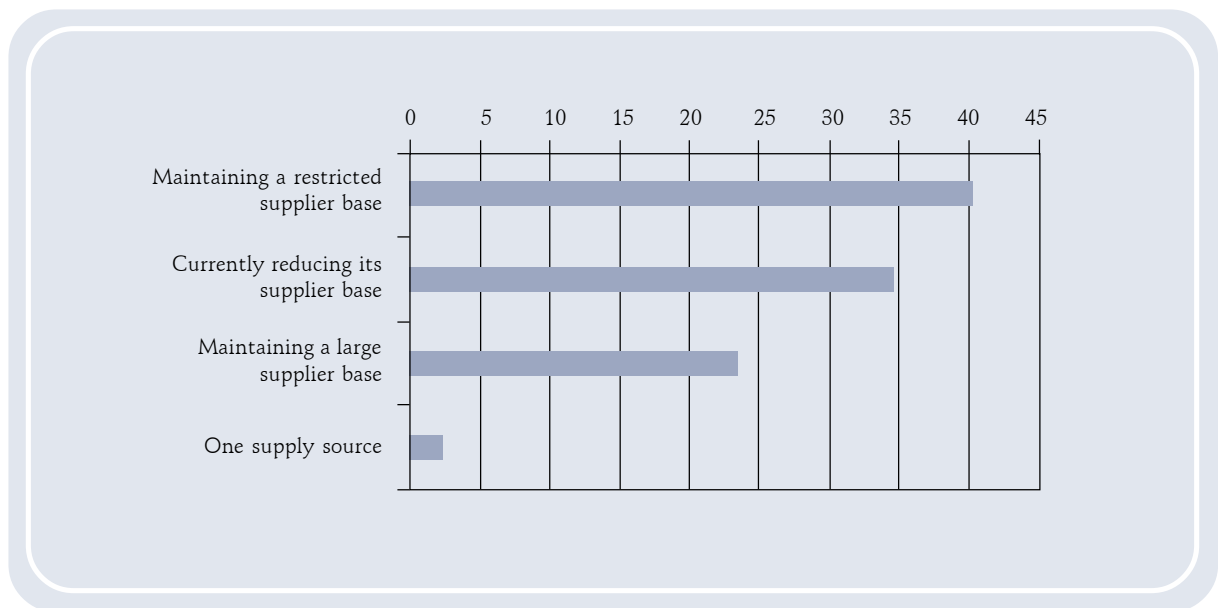


Chart 8 – Company supplier-base practice

In general, retaining a wider supplier base is justified by the need to reduce the uncertainty of product availability. Furthermore, this may lead to greater bargaining power in negotiating purchase prices, given the greater number of competing suppliers. However, such cases are characterized by short-term relationships, which invariably hold back the building of mutually advantageous partnerships.

Thus, in the context of collaborative practices, companies operating in Brazil tend to form a smaller, but more selective supplier base. Hence, it is becoming more and more feasible to create partnerships aimed at developing or enabling suppliers.

CONCLUSION

The results of the current research are surprising in the clarity with which the respondents ranked the various policies of collaborative relations with suppliers. Specialists and authors associated with supply chain management confirm that the emphasis on strategic administration of supply chains has changed; what was previously considered merely a tactical exercise has become a recognized strategic function that determines the success or failure of the company. The relationship with suppliers is considered fundamental to the optimization of the supply function in the production process. 149 companies operating in Brazil responded to a survey questionnaire. The results were analyzed for the purpose of determining the strategic importance of supplier relationships through an examination of how a collaborative national and international environment is created. The results demonstrate critical points for the creation, structuring and development/maintenance of collaborative relationships with suppliers. The main conclusions are summarized in the following table (Table 7).

Table 7 highlights the current trend toward optimization of the major supply chains in Brazil. Despite the continued presence of certain purely transnational relationships, there is an undeniable evidence of a movement toward modernization by means of the adoption of collaborative techniques or practices among the large supply chains studied. Despite currently being perceived as unimportant in this process, the Brazilian government should act to create institutional and legal environments appropriate to the development of trust among network partners.

The overall picture shows a trend of corporations toward the adoption of collaborative models of business relationships, specifically in the areas of maintaining a solid supplier base, follow-up with suppliers, and the use of multi-functional teams in supply chain management. However, it is important to note how this changing process from a traditional transactional model to a collaborative model is occurring. For example, companies need to

become increasingly active in the elimination of opportunistic practices, so that the trust and confidence, essential to a collaborative business environment, may be established and developed.

A useful comparison to Brazil's current situation can be made with India, a country whose stage of socio-economic development is similar to that of Brazil. Sahay et al. (7) point to three primary ways to improve supply chain management in India: alignment of the supply chain goals with corporate strategies, expanded utilization of information technology tools, and the development of a collaborative culture through information sharing and joint planning, among other elements.

Brazilian companies, by comparison, are already aware that improvement in supply chain management hinges on precisely those items indicated by Sahay et al. (7). There is a growing potential in Brazilian competitiveness in international markets, which can be maintained only through continuous adoption of collaboration in the supply chain by the major national corporations. Towards this end, greater value must be given to those companies that cultivate a culture of change, and which are active in establishing and diffusing new standards throughout their entire logistics structure.

TABLE 7 – Summary of the items analyzed

1 st level of analysis	2 nd level of analysis	Main conclusions
Inter-company collaboration	Degree of adoption	Potential growth of collaboration in Brazil. Indeed, 34% of companies have already established collaborative policies.
	Values for supplier relations	Trust, efficiency and collaboration are the three most valued dimensions in supplier relations.
Intra-company collaboration	Use of multi-functional teams	Only 14% of the respondents are in a decision-making environment not employing multi-functional teams.
	Departments involved	The main areas involved are logistics and production.
Importance of collaborative practices	Analysis of strategic importance	“Carry out routine evaluations to ascertain competitiveness in meeting delivery deadlines and in product quality” was the collaborative practice deemed to have the greatest strategic importance. On the other hand, government support is scarcely considered in development of local suppliers.
Maintaining and developing collaboration	Supplier follow-up	77% of the companies practice continuous follow-up with their suppliers.
	Making investments	Greater investment is in further information exchange and in selecting more technologically capable suppliers. In other words, much strategic value is placed on managing information flow.
	Supplier base policies	The vast majority of companies (75,5%) already has or is now building a more restricted supplier base.

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