1. Introduction

Trading goods in globalized markets requires firms to understand and adequately manage differences in legislation, culture, and infrastructure, as well as the alignment of purchasing and supply chain systems (Babbar and Prasad, 1998). With the growth of outsourcing in general, the importance of international sourcing has significantly increased over the past years, due to several factors, such as offshoring practices, new sources in emerging market economies, and positive effects on profitability. Even though cost reduction is consistently considered to be the main driver of international sourcing, quality and technology, among other factors, play an important role in decisions to source goods across borders.

The demand for imported goods in Brazil was long restricted by import substitution government policies that either forbade or imposed heavy duties on several product categories (for instance, cars). The opening of the economy to imports in the early 1990’s had the immediate effect of increasing imports, which became an alternative to firms in search of products with improved quality and enhanced technology. A new change in the economic environment came about when the stabilization plan implemented in the middle of that decade succeeded in curbing skyrocketing inflation levels. Having now the possibility of managing costs and faced with an ever increasing threat from foreign competitors in a globalized environment, local companies started to look for new managerial practices to conduct business, among them the best alternatives for managing the supply of the goods they needed in their operations. This has implied a tremendous growth both in the value and the volume of imported goods. Official data from the Ministry of Industry and Commerce report a 227 percent increase in the value of imports over the 2001-2010 period and a 42.4 percent increase from 2009 to 2010. However, little is known about why and how firms have adopted international sourcing practices, what challenges they faced and what were the outcomes.
Overall, despite the importance of the theme, few recent empirical studies on the characteristics of the international sourcing phenomenon can be found in literature and even less in non traditional research contexts, such as Brazil. Nonetheless, these characteristics should not be considered to be similar to those of developed markets, and uncovering such differences should have both theoretical and practical relevance. Most existing studies have focused on global sourcing strategies (for example, Monczka et al., 2006); however, import activities in international sourcing are not necessarily linked to a higher level strategy to allocate production and sourcing worldwide. The distinction made here between global and international sourcing, briefly discussed in the next section of the paper, is relevant to the delimitation of scope of the present research. Nassimbeni (2006) researched international sourcing practices of Italian companies, focusing on motivations, barriers and benefits of engaging in such practices. As part of his recommendations, he suggests the replication of his research in other contexts.

The present study proposes to fill the abovementioned gap by investigating the current international sourcing practices in Brazil and comparing them to results in a developed market context. For this purpose, it takes as its starting point the survey conducted with a sample of 78 Italian companies by Nassimbeni (2006), proceeding to analyze the phenomenon in a different, emerging market, context. More precisely, it identifies the most important motivations, barriers, and benefits associated with the activity of international sourcing by Brazilian importing firms. In addition, it investigates the selection criteria for international suppliers and supply markets. Ultimately, the research reported in the paper responds to the call in Nassimbeni’s 2006 work for the refinement of the constructs he developed and the investigation of the phenomenon in different contexts.

The following section briefly reviews the most important conceptual underpinnings of the research. Then the results are presented and discussed; the final section presents the conclusions and suggestions for further investigation on the subject.

2. Literature background

A diversity of terms are applied to the phenomenon of international purchasing, sometimes with lack of consistency in the application (Quintens et al., 2006). The two most frequently found are global sourcing and international sourcing. Nassimbeni (2006) indicates international sourcing occurs when a firm purchases components and materials from suppliers located outside its national borders; this sourcing may assume different forms according to the geographical reach of the supplier base, the international
distribution of its plants and the design and alignment of its manufacturing strategy. A reasonable distinction identifies international sourcing (or purchasing) with a transactional aspect, involving trade between buyers and suppliers located in different countries, while global sourcing represents a strategic direction and an organizational process (Trent and Monczka, 2003), considering the whole world as a potential source of required inputs (Monczka and Trent, 1991).

Constant environmental changes, such as intense international competition, pressure to reduce costs, need for production flexibility, reduced product development cycles, strict quality requirements and continuous technological change are supposed to be behind motivations to engage in international sourcing (Carter and Narasimhan, 1990). Previous research has identified factors that lead firms to source internationally. Among the main motivators are: lower costs (Spekman, 1991; Min and Galle, 1991; Frear et al., 1992; Birou and Fawcett, 1993; Scully and Fawcett, 1994; Handfield, 1994; Rexha and Myamoto, 2000; Cho and Kang, 2001, Nassimbeni, 2006); better quality (Carter and Narasimhan, 1990; Min and Galle, 1991; Scully and Fawcett, 1994; Handfield, 1994; Samli et al., 1998), production flexibility (Ettlie e Sethuraman, 2002) and access to new technologies (Min e Galle, 1991, Nassimbeni, 2006). Nassimbeni (2006, p. 698) listed the motivators as follows: 1) to purchase materials and components at a lower cost; 2) to obtain access to resources not available in the home country; 3) possibility of acquiring less expensive manpower; 4) global competition; 5) global attitudes of the company; 6) possibility of acquiring advanced technologies; 7) reduction of commercial barriers; 8) possibility of developing a presence in foreign markets; 9) presence of plants in foreign countries; 10) possibility of selling products in supplying markets; and 11) more favourable taxation.

Barriers to international sourcing have for long been attributed to logistics, inventory and distance (Monczka and Giunipero, 1984). Barriers most frequently mentioned within this scope have been delays in transportation (Min and Galle, 1991); geographical distances (Min and Galle, 1991; Frear et al., 1992; Fawcett and Birou, 1993) and delivery-related problems (Frear et al., 1992; Fawcett and Birou, 1993). Other identified barriers have been quality related problems (Min and Galle, 1991; Frear et al., 1992); competence-related problems (Frear et al., 1992; Fawcett and Birou, 1993); cultural differences, such as difficulty with foreign languages (Min and Galle, 1991; Fawcett and Birou, 1993; Leonidou, 1999); and differences in business and customs practices (Frear et al., 1992; Fawcett and Birou, 1993; Leonidou, 1999). Alguire et al. (1994) proposed a classification in terms of internal (for ex. low volume purchases, union agreements, nationalism and travel expenses/time) and external barriers (for ex. protectionist measures such as tariffs, language differences, customs and business practices, and government control on technology transfer). Nassimbeni (2006, p. 699) listed the
barriers as follows: 1) difficulty of logistics management; 2) difficulty of evaluating the competencies of foreign suppliers; 3) difficulty of positive relations with foreign suppliers; 4) difficulty in finding information about foreign markets; 5) cultural and language differences; 6) preferences for home suppliers; 7) lack of direct communication; 8) difficulty in finding qualified purchasing personnel; 9) volatility / fluctuation in exchange rates; 10) customs barriers; 11) bureaucratic problems; 12) different regulations and contractual modalities; 13) political instability of foreign countries; and 14) scarceness of commercial intermediaries/partners.

The most frequently mentioned benefit obtained in the adoption of international sourcing has been lower costs (Rajagopal and Bernard, 1994; Birout and Fawcett 1993, Frear et al. 1992 and Monczka and Giunipero 1984). Other benefits are enhanced competitiveness; better quality; access to technology; enlarged supplier base (Fawcett and Birou, 1993; Rajagopal and Bernard, 1994) and improvement in customer service and delivery performance (Fawcett and Birou, 1993). Trent and Monczka (2003) observed that apart from cost issues, other benefits are rarely measured; in addition, they observed that no quality improvements were reported as a consequence of international sourcing. Nassimbeni (2006, p. 703) listed the benefits (or advantages) as follows: 1) reduction in purchasing costs; 2) reduction in total costs of production; 3) greater availability of materials and resources; 4) acquisition of new technologies; 5) higher degree of product innovation; 6) better quality; 7) greater reliability / punctuality of delivery; 8) greater flexibility to manufacturing volumes; 9) penetration in new markets; 10) lower times for product development; 11) greater productive flexibility to mix; 12) sharing of risk; and 13) growth of market share.

Nassimbeni (2006, p. 700) listed the most common criteria for selecting the supply market in international sourcing: availability of adequate infrastructures; membership to UE; political stability; fiscal policies; import taxes; protectionist barriers; inflation rate; rate of exchange; cultural distance; per-capita gross income. He also listed (Nassimbeni, 2006, p. 702) supplier selection criteria: punctuality and timeliness in delivering; quality; ability to answer to specific requests; price; technological capabilities; volume; flexibility; economical and financial reliability; specialization on specific workings; long-time horizon of the relationship; technical assistance after selling; terms of payment; autonomy in non production activities; design capabilities; geographical proximity; wide mix of workings; and exclusive dedication to the client company.
3. Methodology

As mentioned earlier, this paper reports a replication in the Brazilian context of Nassimbeni’s 2006 study of international sourcing in Italian firms. Thus, a survey was targeted at companies in the list of the 1,000 largest importers (according to FOB import values) in Brazil in 2007, provided by the Ministry of Development, Industry and Commerce. From this base, government agencies, ministries and foundations were excluded. Contact information was obtained for 611 companies, and 176 questionnaires were returned (28.8 percent response rate). Of these, 110 contained answers to questions considered to be vital for the purposes of the research and were considered in the study, representing a 17.9 percent final response rate. Responding companies came from all the main industries in the economy, with the highest representation being from the iron and steel and the chemical and petrochemical industry (both with 15 percent), as well as automotive (11 percent). Half the sample was located in the more industrial state of São Paulo, with the remaining located in several Southern and Southeastern states. In terms of size, almost half the sample qualifies as SMEs according to Brazilian official standards (17.3 percent as small companies, with up to 99 employees, and 33 percent as medium companies, with more than 100 and up to 499 employees).

The questionnaire was an adaptation to the Brazilian context of that used by Nassimbeni (2006), as supplied by the author. The scope of the research is larger than the reported in this paper, containing international sourcing issues other than the ones dealt with here, as well as issues related to the organization and management of supply and strategic positioning. The questionnaire was pre-tested and minor adjustments were made. Besides describing results for the main variables (measured on a Likert 5 points scale) and comparing them to results in the Italian survey, exploratory factor analyses were conducted for motivations, barriers and benefits (also compared with Italian results), by means of the principal component method, with Varimax rotation of the matrix of components.

Main limitations relate to the possibility of differences in the research instruments (despite measures to control for quality of translation and adaptation, such as backtranslation) and in the profile of respondents, as well as in the time lag between the two surveys. Methodological issues in surveys, such as those associated with perceptive measures and the knowledge respondents had on the phenomenon (despite having been internally identified as responsible for international sourcing in their respective companies) may also limit the validity of results.
4. Results and discussion

Due to space constraints, it will not be possible here to present results in great detail. In this section the main findings will be presented mostly in a narrative way, in order to convey the characteristics of the international sourcing aspects focused in the paper, the structure of the main constructs as revealed by factor analyses conducted and comparison of both with results in the Italian survey (more detailed data can be obtained from the corresponding author).

4.1 Motivators

In the Brazilian sample, the rank (based on 1- non relevant factor to 5 – very relevant factor) of motivators was as follows: 1) to obtain access to resources not available in the home country; 2) to purchase materials and components at a lower cost; 3) possibility of acquiring advanced technologies; 4) global attitudes of the company; 5) more favourable taxation; 6) global competition; 7) presence of plants in foreign countries; 8) reduction of commercial barriers; 9) possibility of acquiring less expensive manpower; 10) possibility of developing a presence in foreign markets; and 11) possibility of selling products in supplying markets. Even though they are not dissonant with previous research, findings show that motivators observed in more developed contexts such as the opportunity to tap into lower manpower costs and to enhance the presence and market opportunities abroad based on import activities are still not seen as relevant.

Compared with the results in the Italian survey, differences include the main motivator – the acquisition of materials and components at a lower cost in that context – as well as the higher importance given by firms in the Italian context to factors such as access to lower wages and global competition. The difference in contexts is certainly behind the higher importance given by Brazilian importers to more favourable taxation, in fact the least relevant in the Italian survey.

Three factors were identified, responding for 61.59% of total variance. All variables had factor loadings above 0.5 and were included in the analysis. All factors had Cronbach alphas equal to or above 0.7. The factors were as follows: Factor 1 – Opportunities and Global Expansion: includes aspects related both to economic benefits of international sourcing (possibility of acquiring less expensive manpower), competition dimensions (reduction of commercial barriers); and aspects related to expansion in foreign markets (possibility of selling products in supplying markets and possibility of developing a presence in foreign markets); Factor 2 – Access to Valuable Resources: includes aspects related to access to resources, be they less costly (to purchase materials and components at a lower cost and
more favourable taxation) or oriented to differentiation (to obtain access to resources not available in the home country and possibility of acquiring advanced technologies); and Factor 3 – Global Presence – includes aspects related to competition in global markets (global competition, presence of plants in foreign countries, and global attitudes of the company). Motivators in the first factor are the least relevant; those in the second are highly relevant; and those in the third are mostly of intermediary importance.

Compared with the structure of factors in the Italian survey, a higher explained variance may be observed (56.6% in the original survey), as well as a very different composition of factors, though in equal number (Access to Cheaper Resources and Intensification of International Competition [variables 1, 3, 4, 5, 7, 9, 11], Presence in New Markets [variables 8 and 10], and Access to Distinctive Resources [variables 2 and 6]).

4.2 Barriers

In the Brazilian sample, the ranking (based on 1 – non relevant barrier to 5 – very relevant barrier) of variables was as follows: 1) bureaucratic problems; 2) customs barriers; 3) volatility/fluctuation in exchange rates; 4) difficulty of positive relations with foreign suppliers; 5) difficulty of evaluating the competencies of foreign suppliers; 6) lack of direct communication; 7) different regulations and contractual modalities; 8) difficulty in finding qualified purchasing personnel; 9) difficulty of logistics management; 10) difficulty in finding information about foreign markets; 11) preferences for home suppliers; 12) political instability of foreign countries; 13) scarceness of commercial intermediaries/partners; and 14) cultural and language differences. This is an interesting result, differing from all previous findings. The main obstacle in Nassimbeni’s study was difficulty in managing import logistics – it comes as a surprise that this aspect ranks among the less relevant for Brazilian importers. On the other hand, the main barrier to international sourcing in Brazil is very context-specific, and might apply to other emerging economies. Bureaucratic problems plague the Brazilian economy and the inefficiencies they cause are still known as “the Brazil Cost”.

Differences relative to the results for the Italian sample, apart from the diverse perception of bureaucratic problems as a major barrier, are customs barriers and volatility in exchange rates, less perceived as an obstacle in the original survey. These are all typical of emerging economies and more turbulent economic environments. On the other hand, Brazilian importers seem to be less affected by cultural and language differences, in fact the least relevant barrier in the present survey, while it is the fifth in importance for Italian importers.

In the case of barriers, a number of variables were excluded from the
factor analysis. In the Italian survey, despite the identification of four factors with the 14 variables, it was not possible to interpret two of them. Thus, only 10 variables were included, forming two factors that together explain 57 percent of total variance. All ten variables had factor loadings above 0.5. The structure of the factors is as follows: Factor 1 – Difficulties in Relationships and Information, which involves difficulties in establishing communications channels to provide information about suppliers and supply markets (difficulty in finding information about foreign markets; difficulty of evaluating the competencies of foreign suppliers; difficulty of positive relations with foreign suppliers; difficulty in finding qualified purchasing personnel; and lack of direct communication) and differences in context (cultural and language differences) and Factor 2 – Bureaucratic Difficulties and Adverse Business Environment (volatility/fluctuation in exchange rates; customs barriers; bureaucratic problems; and different regulations and contractual modalities). Cronbach alphas were 0.822 and 0.768 respectively. Few differences were found in relation to the Italian study – the main one is the “cultural distance” variable, that in the case of Italy loaded in the second factor.

4.3 Benefits

In the Brazilian sample, the ranking (based on 1 – benefit with little relevance to 5 – very relevant benefit) of variables was as follows: 1) reduction in purchasing costs; 2) reduction in total costs of production; 3) better quality; 4) acquisition of new technologies; 5) higher degree of product innovation; 6) greater availability of materials and resources; 7) greater reliability/punctuality of delivery; 8) greater flexibility to manufacturing volumes; 9) lower times for product development; 10) greater productive flexibility to mix; 11) growth of market share; 12) risk sharing; and 13) penetration in new markets. Perhaps due to their visibility, cost related benefits were considered very relevant. Less relevant perceived benefits seem to be related to more sophisticated international sourcing practices, for instance, risk sharing, associated to partnerships with foreign suppliers that are still infrequent in Brazilian companies; lower product development times, and penetration in new markets. Overall, these results are in line with existing literature. It should be observed that, after the fact, the main motivator for the Brazilian sample, the acquisition of resources not available in the home country, was perceived only in the 6th position as a benefit. This may reveal that once motivated to source from abroad, firms find other benefits that were not their initial target for engaging in the activity.

Contrary to motivators and barriers, perceived benefits were ranked in the Italian and Brazilian studies in quite a similar way. In both, in fact, easily quantifiable outcomes of international sourcing are considered as the
most relevant. Other benefits are less evident, and may have occurred due to several different factors, such as, for instance, growth in market share.

Factor analysis of Brazilian data resulted in a structure of three factors, responding for 68.08 percent of total variance. All variables were included in the analysis and had factor loadings above 0.5. The structure of the factors is as follows: Factor 1 – Optimization of the Productive Process and Market Expansion (greater flexibility to manufacturing volumes; greater productive flexibility to mix; greater availability of materials and resources; sharing of risk; penetration in new markets; and growth of market share); Factor 2 – Innovation, Technology, and Quality (higher degree of product innovation; acquisition of new technologies; better quality; lower times for product development; and greater reliability/punctuality of delivery); Factor 3 – Cost Advantage (reduction in purchasing costs and reduction in total costs of production). Cronbach alphas were 0.869; 0.818 and 0.855, respectively, for the three factors.

Expressive differences were found between factors analyses in the Italian and Brazilian surveys concerning benefits. Four factors were found in Nassimbeni’s study, representing 72.7 percent of total variance. Considerable similarities were identified in the structure of factors, for instance, cost related Factor 3 is identical. This points to the effective relevance of cost issues both as motivators and actual benefits obtained from international sourcing activities. Otherwise, the two variables in the fourth factor in the Italian survey (market expansion and penetration in new markets) representing commercial expansion into new markets loaded in the Brazilian survey with the optimization of production processes, a result which could not be adequately interpreted.

Table 1 synthesizes the comparison of factor analysis results in the Italian and Brazilian studies.

4.4 Import market and supplier selection

The most important criteria for selecting import markets were the existence of adequate transportation and communications infrastructure; fiscal policies; exchange rates; protectionist barriers; and import duties. Respondents were asked to rate the importance of 16 supplier selection criteria both when choosing domestic and foreign suppliers. No relevant differences were found in the importance attributed to criteria in each of the situations, except for geographical proximity, logically more important in the case of choosing local suppliers (avoidance of freight and other distance related costs). Price had a slightly higher score for domestic suppliers (consistent with the motivators), but the difference was not statistically significant. Apparently no major differences were found the in the importance of selection criteria for foreign suppliers in the Brazilian and Italian
samples. There is however an indication of a difference in the higher importance attributed by Italian importers to more sophisticated criteria such as specialization in a specific operation and autonomy in the management of complementary activities to production.

Table 1. Comparative Summary of Factor Analysis Results

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<th>Motivators</th>
<th>Barriers</th>
<th>Benefits</th>
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<td></td>
<td>Number of Factors</td>
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<td>Identical Factors</td>
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<td></td>
<td>Brazil</td>
<td>Italy</td>
<td>Brazil</td>
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<td></td>
<td>Factor 1</td>
<td>Factor 2</td>
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<td>Brazil</td>
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<td>4</td>
<td>4</td>
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<tr>
<td>Italy</td>
<td>3</td>
<td>7</td>
<td>2</td>
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5. Conclusions

There is a great dissonance between the present magnitude of Brazil’s GDP and its position as as world importer, in which it has ranked lately in the 25th position. This leaves open the possibility of greatly increasing import activities, and the present study contributes to understanding better both the importance and the nature of factors pertaining to international sourcing activities.

The present research contributes to purchasing and supply management literature by surveying characteristics of international sourcing in the context of an emerging economy, in which the regulatory and business environments are supposed to differ from those of developed economies. As emerging economies, and especially those included in the BRICS acronym (Brazil, Russia, India, China, and South Africa) come to represent an ever growing portion of world GDP, increased knowledge about international sourcing
practices should be scientifically meaningful and practically useful.

Brazilian firms acquire from foreign suppliers both low cost products and those requiring high quality and technology. Indeed, the most important motivator for engaging in international sourcing practices is to look abroad for resources that are unavailable domestically, followed by access to less costly resources. Therefore, one characteristic of international sourcing in Brazil at present seems to be the need to tap into resources that will help companies to gain competitiveness, be it by acquiring cheaper components and materials or by obtaining resources that help to enhance differentiation in the market. This has been possible due to changes in the economic environment that opened the borders to foreign products in advantageous conditions. In more developed contexts like Italy, it makes sense that cost reduction remains the primary reason for sourcing internationally.

The most important difference relative to previous literature and in particular to Nassimbeni (2006) is in the characteristics of barriers to international sourcing practices. The significant number of bureaucratic problems faced by importers, such as in customs, licences, foreign currency contracts, etc. is a major barrier to the increase in international sourcing in Brazil. On the other hand, perceived benefits, related to cost, coincide with those revealed by previous investigations.

This research also contributes to the understanding of the phenomenon by further investigating the structure of relationships between variables in the constructs of motivators, barriers and benefits of international sourcing. Having in mind the need for caution due to possible methodological issues limiting the validity of comparisons, it may be assumed that differences in factor numbers and structures in the Brazilian and Italian studies can be traced back to context. Further studies, in different contexts and realities, may contribute to advance knowledge on these practices and refine scales to measure related constructs.

An additional contribution of this research are insights on international sourcing practices when smaller sized companies act as importers. Nassimbeni (2006) observed that most international sourcing studies focused on global or multinational companies, even though the phenomenon might also be important, for strategic reasons, even for companies without an international distribution of assets, such as smaller sized firms. The high representation of smaller sized companies in the Brazilian sample may explain why access to unavailable resources or advanced technologies were seen as very relevant motivators to engage in international sourcing; likewise, bureaucratic, customs and exchange rate issues identified as main barriers, even though a context-related problem affecting all importers, may have a particularly strong effect on SME’s lacking the resources or means to easily overcome them. In practical terms, this may be an impor-
tant issue that potential exporters to such companies should bear in mind, especially as the fourth main barrier identified in the Brazilian sample was the difficulty of [establishing] positive relations with foreign suppliers.

In conclusion, it may be said that this research supports Nassimbeni’s in the sense that international sourcing seems to be moving away from the initial stage focused on cost to become an instrument to search for competitive advantage with the use of valuable resources obtained across borders.

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Abstract

This paper investigates current international sourcing practices in an emerging market context based on a sample of 110 Brazilian importers, comparing them with results from an original study in a developed market context conducted by Nassimbeni (2006) with a sample of Italian companies. The survey identifies the most important motivations, barriers, and benefits associated with international sourcing, as well as selection criteria for supply markets and suppliers. Even though similarities could be identified in the responses to both surveys, results point to some relevant differences, especially in the perception of motivations and barriers. Several requirements mentioned in the literature were observed in the practices of Brazilian importers, indicating a relative degree of development in international sourcing practices in Brazil. As in the original study, factor analysis was conducted in order to identify dimensions behind the constructs of motivations, barriers, and benefits of international sourcing, and resulting factors were compared to those in the Italian study. Conclusions in the paper highlight the nature of differences found in the two surveys and where they can be traced back to context; in addition, a contribution is made to the discussion of the relevant constructs and the proposition of scales to measure them.

Riassunto

Questo lavoro analizza le pratiche internazionali di “sourcing” in un campione di 110 importatori brasiliani. I risultati sono stati poi confrontati con i risultati di uno studio realizzato su un campione di imprese italiane (Nassimbeni, 2006). L’indagine individua le motivazioni più importanti, le barriere, e benefici connessi con l’approvvigionamento su scala internazionale, nonché i criteri di selezione dei mercati di approvvigionamento e dei fornitori. Sebbene siano emerse numerose somiglianze tra le due indagini, i risultati evidenziano alcune differenze importanti, soprattutto nella percezione delle motivazioni e delle barriere. Diversi requisiti riportati in letteratura sono stati rilevati nelle pratiche degli importatori brasiliani che indicano un discreto grado di sviluppo delle pratiche internazionali di sourcing in Brasile. L’analisi fattoriale è stata condotta al fine di individuare le dimensioni che si celano dietro i costrutti relativi alle motivazioni, alle barriere e ai benefici legati all’approvvigionamento su scala internazionale. I fattori così identificati sono stati poi confrontati con quelli emersi dallo studio italiano. Le conclusioni del lavoro evidenziano la natura delle differenze emerse nel comparare le due indagini e come esse si possono far risalire al contesto di origine.

Jel Classification: M11, M16

Keywords (Parole chiave): international sourcing; motivations; barriers; benefits; Italy-Brazil comparison (approvvigionamento internazionale, motivazioni, fattori ostacolanti, benefici, confronto Italia-Brasile).
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The authors wish to thank the support the research received from the PRONEX/FAPERJ/CNPQ project.

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