

INDUSTRIAL DISTRICTS EVOLVING IN GLOCAL VALUE CHAINS: EVIDENCE FROM THE ITALIAN WINE INDUSTRY

by Valentina De Marchi, Roberto Grandinetti

1. Introduction

The developed world's industrial districts – and especially those in Italy (the country with the highest density of this particular form of spatial organization of production) – have been undergoing profound changes in the last fifteen years, due mainly to globalization and, more recently, to a worldwide recession.

The changes taking place in Italy's industrial districts have attracted the attention of numerous scholars and we now have an abundance of publications focusing on this topic from various angles. Quantitative research has been conducted to analyze fairly broad sets of districts (Pastore, Tommaso, 2013; Ricciardi, 2013; De Marchi, Grandinetti, 2014b), some of them diagnosed as being in decline, while others are in relatively good competitive health. These findings have been confirmed by numerous studies concentrating on a given, particular district. Other contributions have been looking at the various specific, economic or socio-cultural factors that, taken together, give the impression that the lengthy Marshallian season characteristic of the industrial districts of Italy has come to an end. There was a time when firms could clearly benefit from being part of an industrial district (Piore, Sabel, 1984), but nowadays this seems to be not necessarily the case. Some studies (Rabellotti, 2004; Amighini, Rabellotti, 2006; Chiarvesio et al., 2010; De Marchi et al., 2014) have shown that the destiny of Italian industrial districts depends largely on their capacity to occupy an adequate position in global value chains (GVCs), which have become an effective way of representing the competitive space in the era of globalization (Gereffi, 2014).

This paper pools these various analytical perspectives and the evidence that they have generated with a view to taking our understanding of how Italy's industrial districts have been changing a step further. First of all, we aim to clarify in what sense the Italian industrial districts could be qualified as Marshallian in their golden age. Then we shall identify the reasons why that particular model has been tending to decline (Section 2). From

there, we go on to see why – when faced with situations that have led to the collapse of the Marshallian model – some districts seem to have taken a definite downturn while others have succeeded in evolving and reproducing the district form. To do so, we must shift our attention from the district as a system of enterprises to the firm level, and subsequently return to the systemic outlook. To be more precise, the key element in our analysis lies in those district firms that have revealed a capacity for international entrepreneurship, firms capable of grasping new business opportunities, re-considering their position and their relationships in the global value chain (Section 3). The huge body of information and district case studies on a particular sector – that of quality wines – then gives us the opportunity to thoroughly analyze the Italian districts operating in this sector from the GVC perspective, focusing on their ability to reproduce and evolve even in the present-day competitive scenario (Section 4). Our analysis of the changing landscape of Italian industrial districts provides some interesting food for thought for research on the link between clusters and GVCs, that can reach beyond the specificities of the Italian case, as discussed in the final section of the paper.

2. The Marshallian model of industrial districts and its collapse

Adopting the definition of “cluster” formulated by Porter (1998), which is the most widely used by researchers and policy-makers alike, a cluster is identified by a given geographical area that contains a concentration of interconnected companies and institutions active in a particular field. The definition is broad and the category of clusters is consequently somewhat heterogeneous (Markusen, 1996; Becattini, 2002). In the literature on clusters, there is a widely held opinion that firms localized in any type of cluster enjoy external economies, i.e. economies that are external to the firm, but internal to the cluster. In actual fact, the presence of a differential advantage in favor of enterprises belonging to clusters has only been demonstrated for two types of cluster. The first type includes the industrial districts discovered by Marshall (1890) in England and later rediscovered by Becattini (1979) in Italy, where there is a community factor that represents the primary source of such external economies. The second type concerns clusters that specialize in high-tech sectors and are characterized by a significant interaction between firms and research centers, noteworthy examples being the Rhône-Alpes medical technology cluster (Andersson et al., 2013), and the clusters in Baden-Württemberg (Cooke, Morgan, 1994). The average size of firms in this second type of cluster is much larger, and so is the geographical area containing them.

2.1. What is specific to the Marshallian districts

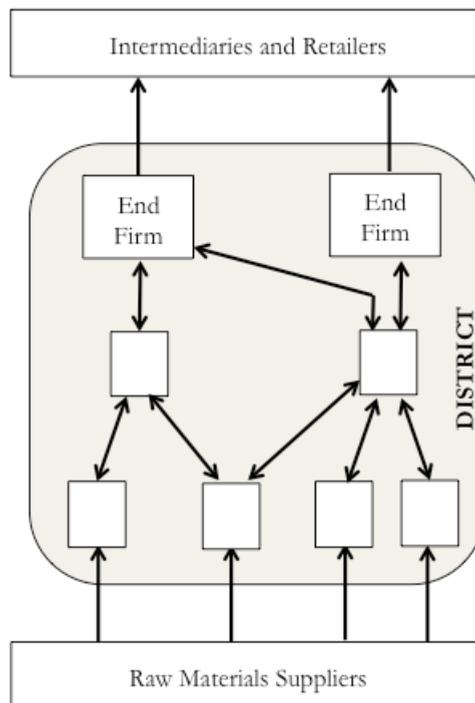
In the clusters of the first type (the Marshallian districts discussed here), the community effect is generated by a mutual penetration between the production domain and the socio-cultural domain, or between a population of firms and a community of people, to put it in Becattini's words (1990). This community factor concerns a shared language, common values and meanings, and implicit rules of behavior (Dei Ottati, 2003). These elements create a common sense of belonging or collective identity (Sammorra, Biggiero, 2001). They facilitate mutual understanding between people activating and managing any inter-organizational relationship within the district, and this, in turn, reduces the transaction costs (Dei Ottati, 2003). In addition, a great deal of tacit knowledge is produced and exchanged in Marshallian districts: these are cognitive processes that demand face-to-face interaction between people, and the quality of their interaction is positively influenced by the mutual understanding favored by the community factor (Camuffo, Grandinetti, 2005; Napoli, 2010; Mistri, 2012). Reasoning in terms of activities and processes at firm level, we can also say that the community factor serves as a cognitive resource that can be used by district suppliers in their approach to district buyers, by the latter in their supply management, and by both in their innovation processes, which often take the form of a co-production of innovation (Bocconcelli et al., 2015).

This interpenetration behind the community factor is not easy to create or reproduce. For a start, it can be achieved only in a naturally, historically and geographically circumscribed area (Becattini, 1990). This area should also be substantially homogeneous from the socio-cultural standpoint (a community of people). Likewise, the local social structure must innervate a production structure that is fairly homogeneous from the sectoral standpoint. District-specific activities must consequently account for a significant portion of the area's whole production structure. For all these reasons, it is impossible to agree with Porter (1998), when he claims that the community factor is a source of competitive advantage for firms localized in any cluster – be it Franciacorta or California, for instance, if we refer to the wine-making industry (Grandinetti, De Marchi, 2012).

If we want to interpret the Marshallian district model from a GVC perspective and, more in particular, if we want to see what type of GVC governance it most closely resembles, we cannot fail to opt for the relational type. Gereffi et al. (2005: 86) see this as a possibility even in the absence of spatial proximity, and they define it in the following terms: *“When product specifications cannot be codified, transactions are complex, and supplier capabilities are high, relational value chain governance can be expected. This is because tacit knowledge must be exchanged between buyers and sellers, and because highly competent suppliers provide a strong motivation for lead firms to outsource to*

gain access to complementary competencies". It is important to mention two important differences, however, between the Marshallian districts and the cases of relational governance analyzed by GVC scholars. The former do without leader firms (in the sense of global leader firms) within the district, or outside it as buyers of the district's products. In GVCs the relationship or, to be more precise, the interaction involves a leader firm and one or more first-tier suppliers, that Gereffi and colleagues call relational suppliers. The latter may be located in a cluster as in the case of the blue jeans industry in Torreon (Mexico) in the years after the NAFTA: relational suppliers are full-package manufacturers, each of which hierarchically organizes the work of a set of subcontractors, while the group of external leader firms includes manufacturers such as Wrangler, brand marketers such as Calvin Klein, and retailers like Wal-Mart (Bair, Gereffi, 2001). Conversely, the majority of the inter-firm relationships in Marshallian districts are of an interactive nature. In the words of Humphrey and Schmitz (2002: 1019), they "are internally complex but externally simple" (Figure 1).

Fig. 1 - Marshallian districts as localized value chains



2.2. *The breakdown of the Marshallian model*

The Italian experience of industrial districts is largely attributable to the Marshallian model (Becattini, 2002) and for a long time – from the 1960s right up until the mid-1990s – it was a dynamic component of the Italian economy and an essential factor in explaining the success of products “Made in Italy” on the international markets during those years (Bocconcelli et al., 2015). But times have changed. In fact, various theoretical and empirical studies have led us to believe that the differential advantage that was a distinctive feature of the Italian industrial district of the past has gradually faded away.¹ Three separate but connected causes have contributed to this outcome:

- a. the global offer of low-cost, intermediate and final goods in competition with the districts’ products;
- b. the declining importance of the districts as privileged “containers” of resources for the more dynamic and competitive district firms; and
- c. the erosion of the community factor by a set of phenomena internal and external to the district.

Concerning the first aspect, all the industrial districts in the “old” world have had to come to terms with a formidable intensification of the global competition since the arrival on the world market of a number of new countries capable of offering a huge range of intermediate and end products at competitive production costs. A great deal of the production capacity that has been added by the “new” world is localized in industrial districts or clusters, as shown by numerous cases studies conducted in Eastern Europe, North Africa, Asia, and South America (Bair, Gereffi, 2001; Cammett, 2006). The globalization of manufacturing activities has had an extraordinary impact on the Italian districts, exacerbated in the last years due to the concomitant effects of a world recession. This has prompted a sizable number of firms located at the end of the district value chains, or those specializing in one or more intermediate phases to abandon the market. The former have suffered from their new competitors conducting an aggressive pricing policy. Many have shut down their businesses, while others have reacted by turning to suppliers from outside the district for their intermediate inputs, sometimes re-insourcing the corresponding activities through proprietary investments abroad (Dunford, 2006; Tattara et al., 2006; De Propriis et al., 2008; Aureli et al., 2010). As a natural consequence of this behavior, the fabric of the supply relationships in the Italian industrial districts has worn thin (Rabellotti et al., 2009; McCaffrey, 2013). Another important aspect to bear in mind is that, in addition to motivating the closure of existing firms, the strong international competition has also

¹For a recent review, see De Marchi and Grandinetti (2014a).

demotivated the birth of new ventures within the districts.

Many of the studies on the changes that have taken place in a given industrial district have nonetheless identified a number of competitively dynamic firms, that have taken an active approach to globalization, rather than submitting passively to its effects. These businesses have increased in size, expanding their stock of internal capabilities and (sometimes more importantly) of relationships that give them access to external resources and capabilities (Furlan, Grandinetti, 2011; Tunisini, Bocconcelli, 2013). To be more specific, their portfolio of inter-organizational relations has been extended in various directions: intermediate goods subcontractors, suppliers of technologies and knowledge-intensive services, distributors, and partners in strategic alliances chosen from among other enterprises operating in the same or similar sectors. But what counts most is that this system of relations has been developed on an international scale, or beyond the boundaries of the firms' respective districts at least (Chiarvesio et al., 2010; Camuffo, Grandinetti, 2011). This has happened partly thanks to the support of information and communication technologies, which have considerably reduced the dominion of tacit knowledge and the related importance of physical proximity (Steinmueller, 2000). At first glance, the presence of these dynamic firms could simply be seen as one of the positive phenomena forming part of the evolution of the district systems. But when we take a closer look, we may well change our mind. In actual fact, if the firms forming a district's dynamic elite increasingly seek the resources they need outside the district environment in order to remain competitive, this means that the district becomes less and less a source of external economies, not only for these dynamic firms, but for the others in the district too. There is an important difference, however, between the firm that (re-)constructs its whole network of relations outside the district and the one that maintains at least some links within the district. This is an extremely important issue and we shall return to it later on.

As Becattini put it (2002), the sense of belonging among district individuals can become deeply ingrained during the district's lifetime, but at some point it may also begin to fade and ultimately disappear. Considering the phenomena that have led to a weakening of the community factor, it is important to bear in mind the effects generated by the above-mentioned changes. It is easy to see that a protracted period of high firm mortality rates and consequent thinning of the relational density within a district is bound to weaken the community's very foundations, the subjects involved and their relationships. In many districts, there has also been a marked growth in the numbers of immigrants, who have replaced local workers in existing firms or started up their own businesses (Murat, Paba, 2006; Dei Ottati, 2009; Bellussi, Sedita, 2010; Cutrini, 2011). A strong influx of immigrant entrepreneurs and employees is bound to negatively affect the socio-cultural homogeneity

on which the community factor relies, with a fallout on interpersonal and inter-organizational relations (Dei Ottati, 2014). Another phenomenon – possibly less visible than immigration, but no less relevant and with similarly disruptive effects – concerns the increased heterogeneity across generations in terms of their values and, more generally, their culture.

3. Beyond the Marshallian model: industrial districts on the move

Taken together, the above-described phenomena have had effects on all the industrial districts, general triggering a gradual breakdown of the Marshallian model (De Marchi, Grandinetti, 2014a). But that does not necessarily mean that Italy's industrial districts have come to the end of their life cycle. As several authors demonstrated already towards the end of the 1990s, when the early signs of change were still weak, the Italian industrial districts were already revealing significant differences in terms of their capacity to respond to the growing globalization of the markets and value chains (Corò, Grandinetti, 1999, 2001; Belussi, Pilotti, 2002). In the years elapsing since, the differences have become more obvious and it is now evident that, even districts operating in the same sector have very different chances of survival and reproduction in today's global economy, as demonstrated by studies on the footwear districts (Amighini, Rabellotti, 2006), or the gold jewelry districts (De Marchi et al., 2014), for instance. We know from these and many other studies that, in order to see where Italian industrial districts are going, we need to shift our attention from the systemic level, typically considered in neo-Marshallian studies on industrial districts, to the enterprise level, focusing particularly on those proving competitively more dynamic (Rabellotti et al., 2009; Grandinetti, 2014b).

3.1. Entrepreneurial district firms and intra-district relationships within global value chains

The district firms that have known how to deal with the challenges of global competition stand out for their international entrepreneurship. Entrepreneurship is the ability of certain individuals to seek, identify and exploit new business opportunities (Shane, Venkataraman, 2000). International entrepreneurship thus has to do with individuals discovering and exploiting international opportunities (Oviatt, McDougall, 2005). Entrepreneurship is associated with some type of innovative change, be it the development of a new product or the activation of a new distribution channel.²

Under the formidable pressure of global competition, the entrepreneur-

²Bearing in mind that both the product and the channel may be new for the firm, or for the market too.

ial district firms have seized new opportunities, redefining their position and their relationships in the global value chain. Empirical studies on the changes taking place in Italian industrial districts have mentioned a variety of internationally entrepreneurial firms. Scholars have concentrated mainly on the category of leader firms, although the terms leader or leading generally carry a local connotation in the literature on industrial districts and not the global one adopted in the GVC literature. Some firms have nonetheless moved on from the role of local leader to become global leaders, as in the case of Luxottica in the Belluno eyewear district (Brunetti, Camuffo, 2000; Sciascia, 2008), or Geox in the Montebelluna sportswear district (Tripodi, 2008; Gottardi, Scarso, 2009). Other district firms that were not leaders have proved to be entrepreneurial, including: small firms that have succeeded in occupying a sustainable niche in the global market (Guercini, 2004; Capasso et al., 2013); subcontracting firms that have responded to the threat of globalization by operating internationally themselves (Bocconcelli, Tunisini, 2001; Furlan et al., 2009); private or public suppliers of knowledge-intensive business services that have avoided remaining captive to the local demand (Camuffo, Grandinetti, 2011; Di Maria et al., 2012); and manufacturers of machine tools, who were among the first district firms not positioned at the end of their district's value chain to embark with conviction on the road to internationalization (Rolfo, Calabrese, 2006; Tunisini, Bocconcelli, 2009).

So, we can start by saying: the larger the set of entrepreneurial firms located in a district, the greater the likelihood that it will reproduce. Vice versa, a district where there are few or no entrepreneurial firms is destined to decline, and the most obvious symptom of this process is a very marked drop in the number of district enterprises. There have been several reports on districts in decline in Southern Italy, where the industrial districts were created rather more recently than in other parts of the country. These districts handled labor-intensive activities delocalized by firms in Central and Northern Italy (Dunford, 2006) and produced end products in the low or medium-to-low price segments (Viesti, 2000; Paniccia, 2002). Among the cases analyzed in more depth, there are the footwear districts in Casarano (Capestro et al., 2014) and Barletta (Amighini and Rabbellotti, 2006) in Puglia, and the Val Vibrata clothing district in Abruzzo (Sammarrà, Belussi, 2006). But Northern Italy has districts that are declining too, like the Como textiles district (Alberti, 2006) and the gold jewelry district in Vicenza (De Marchi et al., 2014). In all these industrial districts, the end firms – starting with the largest – have delocalized much of the production that was once typically handled within the district. In most cases, the decision to do so was dictated by a purely defensive strategy to contain costs in an effort to cope with emerging competitors by competing on the price level. But embarking on this “low road” to competitiveness has proved to be a losing battle. Among

the various reasons for the failure of this strategy, one that has often been mentioned concerns the fact that the costs of producing or procuring abroad have proved higher than many Italian district firms expected. These firms were accustomed to making use of the tacit knowledge base and informal relations typical of the district and they lacked the knowledge codification capabilities needed to manage new plants and supply relationships in far-away places (McCaffrey, 2013). In addition, while Italian producers delocalizing to developing countries were meeting with these difficulties, many firms and clusters in developing countries were upgrading their production operations and adding new value-creating activities (functional upgrading) to produce and market their own products more efficiently and effectively (Humphrey, Schmitz, 2002; Pietrobelli, Rabellotti, 2006).

It is worth emphasizing that the fundamental feature distinguishing the resilient districts from those in decline is not just the sector, but the presence of entrepreneurial firms (Ricciardi, 2013). The specialization of the Mirandola district in Emilia-Romagna (disposables and electromedical machines), for instance, naturally makes it easier to defend against global competition (Belussi et al., 2008). But if this were the only issue, it would be difficult to explain why two districts specializing in the same (footwear) sector – the previously-mentioned Casarano and the Riviera del Brenta in the Veneto region – are performing so differently, the former now in decline, while the latter retains its competitive capacity.

The presence of entrepreneurial firms is a condition that is necessary for districts to avoid succumbing to global competition, but not sufficient to guarantee the reproduction of the district form. This can only happen if the leading firms and other entrepreneurial firms do not separate their destiny from their districts, as Bellandi put it (2007), and as seen in the previous section of the paper. They can preserve their district relations – albeit selectively – with suppliers of inputs that are technologically complex, for instance, and/or highly customized (De Propriis et al., 2008; De Marchi, Grandinetti, 2014a). By doing so, they can serve as knowledge gatekeepers between the global environment and the district (Morrison, 2008; Grandinetti, 2011; Munari et al., 2011). In short, we can revise our previous claim concerning the reproducibility of the industrial districts as follows: the larger the set of entrepreneurial firms located in a district, the greater the likelihood that it will reproduce, providing these entrepreneurial firms maintain relations within the district.

A different trajectory has been described in the literature, and that is the transition from an agglomeration of resources and competencies distributed amongst a plurality of interdependent firms (i.e. the district) to an agglomeration of resources and competencies concentrated in a few big corporations that are not interconnected. The latter resist, while the district form tends to disappear. The most evident example of a district being

replaced by this sort of hierarchy is the Belluno eyewear district. Various studies have documented a long process of demographic decline for the firms in this industrial district along with a strong concentration of the district turnover and workforce in a few enterprises (Camuffo, 2003; Nassimbeni, 2003; Campagnolo, Camuffo, 2011). At present, it would seem that the population of district firms is being supplanted by a few business groups that are vertically integrated or connected to an international network of suppliers. The unquestioned leader enterprise is Luxottica, a world leader with net sales of more than €7.3 billion in 2013 and over 70,000 employees. The business runs a fully-integrated production cycle with six production plants in Italy,³ three in China, one in Brazil and one in the United States. Luxottica's brand portfolio is very broad, including house brands like Ray-Ban, and licensed brands like Giorgio Armani. The firm's vertical integration policy also extends to distribution, with a growing weight of its direct control over the wholesale and retail stages (Tonchia, Quagini, 2010). In 1995 Luxottica acquired Lenscrafter, the largest optical retailer in North America, and it has continued to grow in leaps and bounds. Today, nearly 3 in 4 of the group's employees work in its wholesale or retail operations. It would be hard to find another enterprise so closely conforming to the type of GVC governance that Gereffi et al. (2005) called a hierarchy.

Fig. 2 - Industrial districts in transition

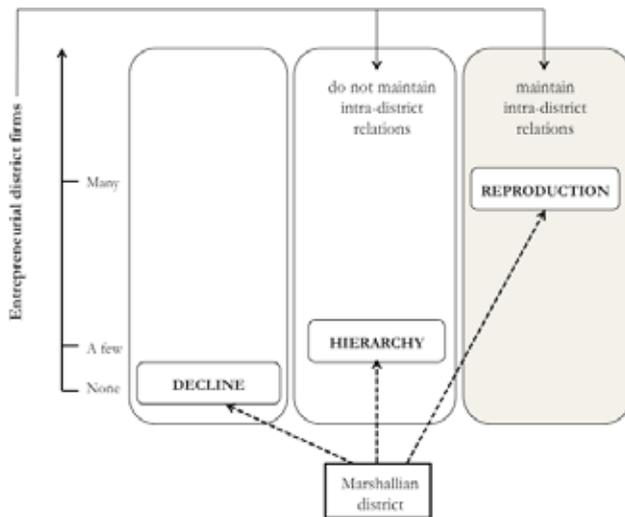


Figure 2 illustrates the three above-described patterns of district change (starting from the Marshallian model) – reproduction, hierarchy and decline – according to the presence of entrepreneurial firms and their choice to maintain intra-cluster relationships.

³The most important factory is located within the district, together with the group's head office.

3.2. *The variety of reproducing and evolving industrial districts*

The category containing the post-Marshallian districts with a reproductive capability seems to be heterogeneous. The picture that the currently available studies enable us to envisage is still somewhat fragmentary, but it gives us the distinct impression that the GVC approach is an appropriate tool for its analysis.

If we look at the previously-mentioned footwear district along the Riviera del Brenta, for instance (which specializes in the production of top-quality ladies' footwear), we find a group of firms that has become important, in numerical terms and turnover, consisting of manufacturers that do not use their own brand. They supply the end product to firms in the luxury-fashion goods market, including major players like LVMH, Gucci, Prada, and Giorgio Armani. By becoming end product subcontractors, these firms have undergone a process of functional downgrading, but – as Amighini and Rabellotti rightly point out (2006) – this strategy has not impoverished them. True to district tradition, several pioneers paved the way, and were later imitated by numerous other manufacturers (Rabellotti, 2004). Several major buyers subsequently invested directly in the Brenta district, purchasing existing firms or creating new ventures. The global leader firms now occupy a place within the district too, alongside the luxury subcontractors, and they are part of the same GVC, which is clearly buyer-driven and involves a relational governance.⁴ Despite a severe selection in the last 10 years, the rest of the district is showing no signs of inexorable decline. No recent analyses suited to our purposes have been conducted on this part of the district, but the available information suffices to delineate a group of firms that are succeeding on the market with their own or licensed brands, positioning themselves mainly in the medium- to high-quality segments, albeit with a few exceptions – such as René Caovilla, who occupies an extreme luxury niche with shoes that he himself defined in a book he wrote as “works of art” (Caovilla, Zorzi, 2009). These firms enable the survival of the district's subpopulation of small manufacturers of components and accessories (Messina et al., 2009), which they share with global leader firms that buy from them either directly or indirectly through luxury subcontractors. In these second-tier subcontractors in the Brenta district, we can therefore see two overlapping GVCs.

In order to better grasp the diversified category of Italian districts capable of reproduction in the current competitive scenario, we decided to focus on

⁴ As in the case of the blue jeans cluster of Torreón studied by Bair and Gereffi (2001), although the actors have all shifted to the higher-quality market segment in the case of Brenta district. In a buyer-driven GVC market information, product design and marketing/advertising costs set the entry barriers for would-be lead firms, that are mainly retailers and/or brand marketers (Gibbon et al., 2008).

the quality wine districts. This may seem a paradox because these districts were once considered a rather weak variant of the Marshallian model since grape growing and wine making are generally done by the same firm, and the potential for the development of other, vertical relations is somewhat limited. Moreover, these very districts have suffered less than others during the period analyzed here, leading them to be seen as the last of the representatives of the Marshallian model (Grandinetti, De Marchi, 2012). The numerous academic studies on this type of district and the abundance of secondary sources enable us to dispel this apparent paradox and, here again, the GVC perspective proves essential.

4. Industrial districts evolving in global value chains: evidence from the wine industry

The wine industry is one of the Made in Italy sectors that has suffered the least from the recession of 2008-09 and beyond. Between 2009 and 2013, the year-by-year variations in sales and profitability indices point to a good performance, especially as concerns exports and the quality wines segment (Ufficio Studi di Mediobanca, 2015). Italy has thus succeeded in improving its already excellent international position, replacing France as the largest exporter in the world. These results are undeniably important, especially considering that this sector has not escaped the intensive process of globalization. There has been a strong growth in the presence on the world market of new producers (developed or developing countries), such as South Africa, Australia, New Zealand, Chile, Argentina and the United States (Campbell, Guibert, 2006; Gwynne, 2008; Jenster et al., 2008; Rossi, 2013). There is evidence of significant upgrading processes underway in this sector too (Visser, de Langen, 2006; Gwynne, 2008; Ponte, Ewert, 2009).

Speaking of quality wines, the reference geographical areas in Italy are those classified as DOC (*Denominazione di Origine Controllata*, Controlled Designation of Origin) and DOCG (*Denominazione di Origine Controllata e Garantita*, Controlled Designation of Origin Guaranteed).⁵ In several of these areas, there is a high concentration of wine-makers and other businesses and institutions actively involved in the wine sector, which give rise to an industrial district as in the numerous wine clusters observed and studied in various parts of the world (Harfield, 1999; Aylward, 2004; Zanni,

⁵ DOCG-labelled wines are analyzed and tasted by government-licensed personnel before being bottled. The Italian DOC and DOCG regions correspond to the French AOC (*Appellation d'Origine Contrôlée*) and AOCG (*Appellation d'Origine Contrôlée et Garantie*). The wines produced in these areas and in similar regions elsewhere in Europe formed part of a QWPSR category (Quality Wine Produced in a Specific Region) acknowledged by the European Union. This was replaced in 2011 by the PDO (Protected Designation of Origin), which includes wines and other foodstuffs that are "produced, processed and prepared in a given geographical area, using recognized know-how".

2004; Giuliani, Bell, 2005; Dana, Winstone, 2008; Guthey, 2008). The Italian quality wine districts have also been the object of various research efforts that provide a good empirical basis for taking a look at them in the context of our analysis (Table 1).

Table 1 - Studies on Italian quality wine districts

District	Region	Studies
Brunello di Montalcino	Tuscany	Mattiacci, Zampi (2004); Doria et al. (2004); Alampi Sottini et al. (2013)
Chianti Classico	Tuscany	Doria et al. (2004);
Colline Novaresi	Piedmont	Morrison, Rabellotti (2009)
Colline Pisane	Tuscany	Giuliani (2007)
Conegliano and Valdobbiadene	Veneto	Galletto, Bianchin (2009a, 2009b); Rossetto et al. (2011); Boatto et al. (2013); Callegari, Nevoso (2014); De Marchi, Grandinetti (2014b)
Franciacorta	Lombardy	Zamparini, Lurati (2012)

4.1. Quality wines from industrial districts: Marshall again?

The population of firms operating in a typical Marshallian district is characterized by a strong degree of inter-firm division of labor (Becattini, 1990). Many of the firms specialize in one or a few intermediate phases of the production process or operate at the end of this process, while others are involved in supplying equipment, tools, machines, technologies and various kinds of business services. Consistently with this feature, vertical inter-firm relationships between firms are the main way of transferring knowledge within the district (Camuffo, Grandinetti, 2011). As mentioned earlier, however, the inter-firm division of labor is not all that well developed in the wine districts,⁶ which consequently lack that density of knowledge exchanges between firms characteristic of the Marshallian model (Giuliani, 2007; Morrison, Rabellotti, 2009). Cognitive relations are hugely important to a sizable proportion of the district's enterprises, but they take place mainly with subjects specializing in the production and transfer of knowledge, that are located outside the district: enologists, service centers, university departments and research institutes (Giuliani, 2007; Morrison, Rabellotti, 2007; Galletto, Bianchin, 2009a). Typically, these are wineries that have their own in-house enologists who can consult colleagues working in research organizations or technical services in the enological field, when they are faced with a problem for which they do not have an answer.

⁶This applies both to districts that produce mainly for the mass market (making what are called table wines in Italy) and to those producing quality wines.

In one aspect, however, the wine districts seem more Marshallian than others, especially these days. This aspect concerns the existence and reproduction within the districts of a community factor and shared identity. To understand the particular nature of the districts that produce quality wines (simply called wine districts from now on for the sake of brevity), we need to bear in mind that the district's end product incorporates local raw materials and the territorial specificity permeates the quality and distinctive characteristics of this end product (Bernetti et al., 2006). In other words, winemakers operating in these districts owe their success primarily to the quality of their products and the inseparable link between these products and their *terroir*, i.e. the particular geographical area and environment that give their grapes and wines their distinctive features (Vaudour, 2002). On the one hand, the community factor – an exquisitely intangible value – remains anchored to distinctly tangible grounds. On the other, this factor tends to be reproduced even in the absence of a dense network of supply relationships. In fact, the district's firms (even the most internationalized among them, and those investing the most in their own company brand) exploit the fact of belonging to a region acknowledged for the prestige of its wines as a reputational resource, making it an essential part of their market strategy. This association between wineries and their *terroir* has been highlighted both in Italy (Grandinetti, De Marchi, 2012; Zamparini, Lurati, 2012) and in other countries (Fensterseifer and Rastoin, 2013). An example is that of the Franciacorta district (Lombardy, north-west Italy), studied particularly in-depth by Zamparini and Lurati (2012). The authors found that every single firm had its own communication strategy, but they all attributed great significance to the name Franciacorta and to their belonging to that particular territory, consistently with the communication initiatives carried out by their consortium. So the firms' brands are always associated with the name Franciacorta, which thus becomes a sort of territorial brand. The community factor is a perishable resource, however, that needs to be handled with care. Studies on the prosecco wine district in Conegliano and Valdobbiadene (Veneto, north-east Italy) have reported that some entrepreneurs have been voicing concern about the behavior of other firms in the district that risk damaging the collective resource, with a negative fallout on the whole system (Galletto, Bianchin, 2009a; Callegari, Nevoso, 2014).

Comparing how the community factor works in the wine districts with the one previously described for the "canonical" Marshallian model reveals a far from negligible difference. In the Marshallian district, the importance of the community factor derives from the fact that it is a useful cognitive resource, it facilitates the exchange of knowledge in the profusion of vertical relationships between enterprises. In the wine districts, it serves instead as a reputational resource that the winemaking firms use in communications with the market, and that is reproduced thanks essentially to the horizon-

tal relationships existing between them. This horizontal dimension of the within-district cooperation is basically foreign to the Marshallian model (Maskell, 2001). It demands the presence of an institutional actor – a consortium or other form of association between enterprises – that integrates their marketing communications, as well as establishing rules of behavior that are shared to defend the reputation of the district brand. This organization's crucial role as a coordinator has been clearly demonstrated in empirical studies (Doria et al., 2004; Boatto et al., 2011; Zamparini, Lurati, 2012).

Another particular feature of the association between quality wines and the district form lies in the tendency for a coexistence and positive interdependence between winemaking activities and the tourist sector. The most emblematic examples of this phenomenon can be seen in France (Frochot, 2000), but more recently it has been gaining ground in Italy too (Mattiacci, Zampi, 2004; Galletto, Bianchin, 2009b; Boatto et al., 2013; Gregori et al., 2013). For tourists, the appeal of a such territory owes a great deal to the excellence of the local winemaking industry. Operators in the tourist sector (hotels, restaurants, wine and food stores, local institutions) can also contribute to consolidating the winemakers' good reputation in various ways, ranging from positive comments transmitted by word of mouth to the sale of local products, to the organization of events. The district's relational fabric thus expands and its community factor is reinforced.

4.2. The model of the glocal value chain

In all the Italian wine districts there are one or more leader firms, being usually among the largest companies in their respective districts and, according to Mediobanca, some of them are listed among the 25 largest winemaking businesses in Italy (even though none of them could be considered global leader firms).⁷ The most interesting point, however, is that one of the reasons why these firms are district leaders is because their innovation serves as a reference that many other firms in their district imitate. It is thanks to the diffusion of process, product and marketing innovations introduced by these leaders that the Italian wine clusters have conquered a sustainable position on the global market. It is worth adding that following these leaders is by no means easy, but – in terms of their marketing policies and their acceptance by the market at least – their followers could leverage the territorial brand (Franciacorta, Brunello di Montalcino, Chianti Classico, etc.) to associate themselves with the leader(s) in their district.

The distribution side of the GVC in the wine sector has two main channels: one carries wines sold in bulk, its points of sale typically supermarkets or hypermarkets, and it is dominated by the big retailing chains; the other carries quality wines and the points of sale become the specialist

⁷With the exception of GIV (Gruppo Italiano Vini).

wine stores, or food and wine stores, so it is associated with a much greater fragmentation of the operators involved (Hall, Mitchell, 2008; Thornton, 2013). The wines that “flow” in the first channel are normally linked to a region of origin – especially in Europe – and are also known as premium wines (Charters, 2006). For both distribution channels, we can add all those situations in which wine is drunk away from home, summarized by the acronym HORECA, i.e. hotels, restaurants, catering and other places such as cafés and bars (Bernetti et al., 2006; Pomarici et al., 2012). Since the producers supplying the two channels are also essentially different, in terms of their products and the scale of their production, Hall and Mitchell (2008) identified two distinct (global) value chains that they called *volume value chain* and *specialist value chain*.⁸ The authors added that, “*there are some occurrences where there is a mixing of these two systems, but these are much less common than transactions within each system*” (149-150). To occupy a sustainable position in the specialist GVC, producers must be capable of interacting with commercial intermediaries or directly with subjects interfacing with the consumer, gaining their trust and constructing stable relationships with them over time. This capacity has represented one of the keys to the success of the Italian wine clusters (Mattiacci, Zampi, 2004).

The quality wine clusters dotted all over Italy seems to represent a variant from the specialist GVC described by Hall and Mitchell, that can be defined as a glocal value chain (Grandinetti, 2014a) and that has three distinct traits (Figure 3):

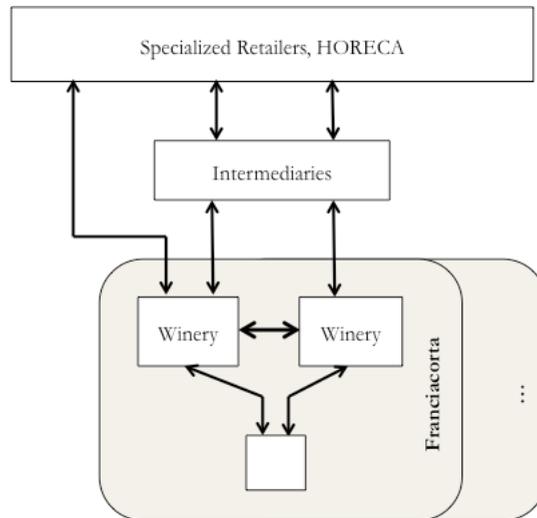
- production is concentrated within a limited number of geographical areas where the typical characteristics of an industrial district combine with a specific *terroir*; within each district, the mechanism of governance is relational, giving priority to horizontal relationships, which are needed to exploit and defend the district brand;
- district firms adopt a selective distribution strategy that links them, directly or through intermediaries, to specialist retailers and/or quality HORECA, which are more or less widespread in every country around the world; for this interface too, the type of governance is relational (Thach, Olsen, 2006); and
- the glocal value chain has local leaders⁹ but not global leaders, neither upstream nor downstream, i.e. it is neither producer-driven nor buyer-driven, in the sense used in the GVC literature (Gereffi, 1999);

⁸To be precise, Hall and Mitchell spoke of volume supply chain and specialist value chain.

⁹Some district leaders have diversified their production, purchasing vineyards and wineries in other districts or in other areas with a winemaking vocation, and presenting themselves to the market with a broader portfolio of wines and brands.

Gibbon et al., 2008).

Fig. 3 - Quality wine districts in glocal value chain



4.3. "Communication machines" within the wine glocal value chain

In order to give a complete account of the glocal value chain in which Italian wine clusters are embedded it is important to refer to a set of actors, being specific to the industry, which play a key role in connecting the wine supply side (the wine quality districts) with the global demand, being a small network of shops (i.e., Eataly), a sector specific trade fair (Vinitaly, based in Verona) and a wine-related cultural event (Salone del Gusto, in Turin). All of them gained particular international echo and "host" Italian quality wines; more importantly from the perspective of our analysis, they function as formidable "communication machines" that contribute to joining the local with the global domain.

Eataly is a store format conceived by Oscar Farinetti, who has come to be seen in Italy as a sort of iconic pure entrepreneur (Olivero, 2005). Everything in the Eataly business model seems innovative, from the direct relationship with producers (no middlemen) to the way of conceiving points of sale, to the partnership with Slow Food – the anti-McDonald movement born in Italy in the early 1990s as an international organization for preserving a world of unique flavors, local food customs and quality foods and wines (Petrini, 2001; Sebastiani et al., 2013). The philosophy becomes tangible in the shops – ten at the moment, located in Italy, the USA and Japan – starting with the first one opened in Turin: with an area of more

than 11,000 m² comprising ten small theme-based restaurants (dedicated to pasta, fish, ice cream, etc.), 2,500 m² for the sale of products relating to the experience of food (not only foodstuffs, but also books, kitchen accessories, etc.), and 11 areas covering another 3,200 m² for educational activities such as cooking lessons and nutritional training for various age groups (Sebastiani et al., 2010).

In Eataly food is only one of the “ingredients” of a richer experience offered to customers, that they perceived as unique, similarly to the example of the French restaurant Frères Troisgros made famous by Normann (1984) in a seminal contribution to the literature on service management. Farinetti’s idea, additionally to Frères Troisgros, was to add greater potential to the experience, amplifying it from the cognitive standpoint and in emotional terms, and offering it at distinctly more accessible prices (Grandinetti, 2014a).

Today, Vinitaly is the international reference trade fair for all categories of operators in the wine industry.¹⁰ The organizers of the event (Veronafiere) rightly describe it as a world platform for the wine business, given the extraordinary number of exhibitors and visitors that attend the event every year. As concerns the exhibitors, there were approximately 4,100 firms occupying the various stands at the trade fair for the 2014 edition, and they came from more than 30 countries. Like other sector-specific trade fairs of international standing, Vinitaly has increased the number of activities and specific events that it hosts as part of the general event (even outside, in the city of Verona), becoming an increasingly rich and complex arena from the communicational and relational standpoint, in terms of the interaction between exhibitors and visitors, and the opportunity to exchange information and know-how (Belussi et al., 2007; Capitello et al., 2014). In short, it is an excellent example of temporary cluster, as Maskell et al. (2006) called the trade fairs of this type.¹¹

The first edition of the Salone Internazionale del Gusto dates from 1996, but in 2012 the event was presented together with the annual meeting organized by Terra Madre, the project created by Slow Food. To understand just how strongly the organizers focus on the idea of an experience founded on specific values, we only need to read how the edition for 2012 was described on the website: *“The Salone del Gusto and Terra Madre 2012 is presenting itself as a great collective narrative, completely open to the public. [...] The stories of people and places will be the starting point as the network of food communities weaves together with the incredible patchwork of the Salone, made up of producers, chefs, Taste Workshops, educational activities, Slow Food Presidia and more. It will enrich it and offer new opportunities to visitors, on top of all the classic events and a rich program of conferences. The stories of the special guests*

¹⁰The trade fair is not open to consumers, however.

¹¹Similarly, and with specific reference to Vinitaly, Hall and Mitchell (2008) speak of short-lived business cluster.

of the Salone del Gusto and Terra Madre 2012 show us how we can change the paradigm that governs this world in crisis, using food as the key. And they show that we can do something good for our health, the environment and the production system without giving up the pleasures of food and conviviality, instead using them as a banner to be waved with pride."

Eataly, Vinitaly, and the Salone del Gusto are very powerful communication machines, capable of increasingly promoting quality foodstuffs of Made in Italy, and particular its wines with their territorial identities and company brands. They stand out for the quality of their communication, which derives from their being designed and managed as contexts for the experiences of those attending them, as places where people interact, learn and feel emotions (Carù, Cova, 2007; Di Bernardo, Grandinetti, 2012). As machines for communicating, they achieve a very broad coverage if we consider just how many subjects they succeed in involving, the producers and other operators in the (global) value chain on the one hand, and the consumers on the other. In addition to the people who actually take part in the experience in the above-described contexts, there are also all those affected by real or virtual (social media) word of mouth, and the people reached by the mass media news.¹²

5. Concluding remarks

This study demonstrates that it can be useful to take the GVC perspective to shed light on the changes underway in Italian industrial districts, confirming and integrating the findings of previous research. Generally speaking, with their departure from the Marshallian model, the destiny of the districts has become intimately associated with the presence of entrepreneurial firms that maintain within-district relationships while also constructing a sustainable position in the GVC at the same time. Since much remains to be clarified concerning the differences between one district and another, it seems useful to pursue our research on the Italian districts evolving within GVCs. It would be equally interesting to identify the differences and any (direct or indirect) links between industrial districts active in the same industrial sector but in different countries, as Nadvi and Halder (2005) have begun to do in looking at the surgical instruments districts of Tuttlingen in Germany and Sialkot in Pakistan, or Hervás Oliver et al. (2008) in studying the ceramic tile districts of Castellon in Spain and Sassuolo in Italy.

A research topic that is worthy of serious attention concerns the intra-district relations, or the "embedded" part of a GVC (Bair, 2008). How have these relationships changed vis-à-vis the way they functioned in the Mar-

¹² The cases mentioned here are not the only communication machines promoting Made in Italy products by creating experience contexts. On a smaller scale, the many events promoting a typical food product from a given territory have a similar role, as in the case of the wine (or wine and food) events organized within our wine clusters.

shallian model? How do the districts differ from this standpoint? There is still a paucity of knowledge on these topics, and we feel encouraged to expand this horizon of analysis in the light of the elements emerging from our study on a type of industrial district (making quality wines) that is rather particular as concerns the role of its horizontal inter-firm relationships in defending a collective reputational resource.

Analyzing the evolution of the industrial districts also provides some useful elements for enriching the theoretical building on the GVC. For a start, it indicates that the way in which the GVC represents certain sectors becomes more realistic if this concept of global value chain (in a given industry) is organized into separate, coexisting variants. This is a point of view that seems all the more interesting when we consider that not all the variants are governed by global leader firms. A given district may belong to one of these variants, as we have seen in the case of the quality wine clusters, or it may host several variants, as in the footwear district of the Riviera del Brenta.

A second issue to consider is the plurality of agents with important roles in a GVC, even if they are not involved in its governance in the sense of coordination (the five models of governance from market to hierarchy) or as driving (be they producer-driven versus buyer-driven), that are the two prevailing interpretations of governance in GVC studies. We refer here to what we have called “communication machines” in our analysis of the Italian wine districts. Though they have a role on the sidelines of the material flow within the GVC (or a marginal one in the case of Eataly), they play a fundamental part in keeping local production and global distribution together in the variant of glocal value chain in which the Italian wine districts operate. The role of these communication machines seems to be part of a third way of meaning governance, that the authors who first proposed it defined as “normalization”, referring to the actions designed to make a given practice compatible with a standard or norm, as in the typical case of product quality (Ponte, Gibbon, 2005; Gibbon et al., 2008). In developing the view of governance as normalizing, and describing the possible quality conventions, a recent contribution from Ponte and Sturgeon (2014) also mentions opinion quality convention, where uncertainty about quality is resolved through the subjective judgment of an expert individual or institution external to the exchange, and the reception by consumers and other publics by measuring media coverage, social media response and opinion polls.

Valentina De Marchi,
Università di Padova
valentina.demarchi@unipd.it

Roberto Grandinetti,
Università di Padova
roberto.grandinetti@unipd.it

Abstract

Drawing from recent empirical literature on Italian industrial districts, this paper sketches an outline for interpreting the changes that have recently been taking place, in the face of strong competition on a global scale in light of the global value chain perspective. Departing from an analysis of the reasons why Italian districts have lost the Marshallian characteristics, we seek to explain why we see some districts well on the road to decline, while others have succeeded in evolving and reproducing the district form. The cornerstone of our analysis focuses on the district firms that can boast an international entrepreneurship, and on the relationship they fuel within districts. A look at some of the Italian winemaking districts adds to our considerations, confirming the utility of taking a global value analysis perspective in order to see where Italian industrial districts are heading.

Riassunto

Utilizzando la recente letteratura empirica sui distretti industriali italiani, l'articolo disegna un quadro interpretativo delle trasformazioni che essi hanno subito nella fase recente, contrassegnata da un'intensa competizione su scala globale. Dopo aver chiarito la natura marshalliana che ha caratterizzato la loro "stagione d'oro", vengono individuate le ragioni che hanno determinato il venire meno di quelle caratteristiche. Con il passo successivo si è spiegato perché si osservano distretti che hanno imboccato la strada del declino ed altri che riescono ad evolvere riproducendo la forma distrettuale. La chiave dell'analisi è data dalle imprese distrettuali dotate di imprenditorialità internazionale, ossia capaci di cogliere nuove opportunità di business ripensando la loro posizione e le loro relazioni nella catena globale del valore. Un focus sui distretti del vino ha arricchito il quadro interpretativo confermando l'utilità di adottare la prospettiva di analisi delle *global value chains* per comprendere le direttrici evolutive dei distretti industriali italiani.

Classificazione Jel: M16; O18

Keywords (Parole-chiave): Italian industrial districts, Marshallian industrial districts, global value chain, wine industry, glocal value chain (distretti industriali italiani, distretti industriali marshalliani, catena globale del valore, settore vinicolo, catena globale del valore)

References

- Alampi Sottini, V., Bertocci, M., Marinelli, N., Marone, E., Menghini, S. (2013). Brunello di Montalcino wine farms: remaining competitive through full-cost accounting. In Mora, P. (Ed.), *Wine Business Case Studies: Thirteen Cases from the Real World of Wine Business Management*, The Wine Appreciation Guild, San Francisco, 109-124.
- Alberti F.G. (2006). The decline of the industrial district of Como: recession, relocation or reconversion. *Entrepreneurship & Regional Development*, 18 (6): 473-501.
- Amighini A., Rabellotti R. (2006). How do Italian footwear industrial districts face globalization?. *European Planning Studies*, 14 (4): 485-502.
- Andersson S., Evers N., Griot C. (2013). Local and international networks in small firm internationalization: cases from the Rhône-Alpes medical technology regional cluster. *Entrepreneurship & Regional Development*, 25 (9-10): 867-888.
- Aureli S., Ciambotti M., Salvatori F. (2010). Internationalisation of Italian shoemaking districts: some empirical evidence from the Marche region. *Piccola Impresa/Small Business*, 23 (2): 97-121.
- Aylward D. (2004). Innovation-export linkages within different cluster models: a case study from the Australian wine industry. *Prometheus*, 22 (4): 423-437.
- Bair J. (2008). Analysing economic organization: embedded networks and global chains compared. *Economy and Society*, 37 (3): 339-364.
- Bair J., Gereffi G. (2001). Local clusters in global chains: the causes and consequences of export dynamism in Torreon's blue jeans industry. *World Development*, 29 (11): 1885-1903.
- Becattini G. (1979). Dal "settore" industriale al "distretto" industriale: alcune considerazioni sull'unità di indagine dell'economia industriale. *Rivista di Economia e Politica Industriale*, 5 (1): 7-21.
- Becattini G. (1990). The Marshallian industrial district as a socioeconomic notion. In Pyke, F. Becattini G., Sengerberger W. (Eds.), *Industrial Districts and Inter-firm Cooperation in Italy*, International Institute of Labour Studies: Geneva, 37-51.
- Becattini G. (2002). From Marshall's to the Italian "industrial districts": a brief critical reconstruction. In Quadrio Curzio A., Fortis M. (Eds.), *Complexity and Industrial Clusters: Dynamics and Models in Theory and Practice*, Physica-Verlag: Heidelberg, 83-105.
- Bellandi M. (2007). Industrial districts and waves of industrialization: a rich and contested terrain. *Scienze Regionali*, 6 (2): 7-33.
- Belussi F., Pilotti L. (2002). Knowledge creation, learning and innovation in Italian industrial districts. *Geografiska Annaler B*, 84 (2): 125-139.
- Belussi F., Sammarra A., Sedita S. (2008). Managing long distance and localized learning in the Emilia Romagna life science cluster. *European Planning Studies*, 16 (5): 665-692.
- Belussi F., Sedita S.R. (2010). Moving immigrants into Western industrial districts: the "inverse" delocalization of the leather tanning district of Arzignano. In Belussi F., Samarra A. (Eds.), *Business Networks in Clusters and Industrial Districts: The Governance of the Global Value Chain*, Routledge: New York, 136-145.
- Belussi F., Sedita S.R., Omizzolo M. (2007). La fiera come cluster temporaneo: piattaforma relazionale e filtro conoscitivo per le imprese. *Micro & Macro Marketing*, 16 (1): 71-93.
- Bernetti I., Casini L., Marinelli N. (2006). Wine and globalisation: changes in the international market structure and the position of Italy. *British Food Journal*, 108 (4): 306-315.
- Boatto V., Galletto L., Barisan L., Bianchin F. (2013). The development of wine tourism in the Conegliano Valdobbiadene area. *Wine Economics and Policy*, 2 (2): 93-101.
- Boatto V., Galletto L., Rossetto L. (2011). Politiche di valorizzazione nella filiera vitivinicola. *Economia Agro-Alimentare*, 10 (1-2): 321-365.
- Bocconcelli R., Grandinetti R., Tunisini A. (2015). "Made in Italy": the Italian contribution to the development of business marketing discipline and practices. *Journal of Business-to-Business Marketing*, 22 (3): 161-196.
- Bocconcelli R., Tunisini A. (2001). La costellazione del mobile nel pesarese: un'analisi

interpretativa. *Piccola Impresa/Small Business*, 14 (2): 83-112.

Bramanti A., Gambarotto, F. (Eds.) (2009). *Il distretto bellunese dell'occhialeria. Leadership mondiale e fine del distretto?*. Fondazione Fiera Milano: Milan.

Brunetti G., Camuffo A. (2000). *Del Vecchio e Luxottica. Come si diventa leader mondiali*. Isedi: Turin.

Callegari F., Nevoso D. (2014). Le principali filiere agroalimentari italiane. In Callegari F., Valentini M. (Eds.), *Filiere d'Italia: Produzioni e reti dell'agroalimentare*, Donzelli: Rome, 107-250.

Cammatt M. (2006). Development and the changing dynamics of global production: global value chains and local clusters in apparel manufacturing. *Competition & Change*, 10 (1): 23-48.

Campagnolo D., Camuffo A. (2011). Globalization and low-technology industries: the case of Italian eyewear. In Robertson P.L., Jacobson D. (Eds.), *Knowledge Transfer and Technology Diffusion*, Edward Elgar: Cheltenham, 138-161.

Campbell G., Guibert N. (2006). Old World strategies against New World competition in a globalising wine industry. *British Food Journal*, 108(4): 233-242.

Camuffo A. (2003). Transforming industrial districts: large firms and small business networks in the Italian eyewear industry. *Industry and Innovation*, 10 (4): 377-401.

Camuffo A., Grandinetti R. (2005). I distretti industriali come economie della conoscenza. *Argomenti: Rivista di Economia, Cultura e Ricerca Sociale*, 5 (15): 1-26.

Camuffo A., Grandinetti R. (2011). Italian industrial districts as cognitive systems: are they still reproducible?. *Entrepreneurship & Regional Development*, 23 (9-10): 815-852.

Caovilla R.F., Zorzi A. (2009). *Oggetti d'arte chiamati scarpe*. Biblos: Cittadella.

Capasso M., Cusmano L., Morrison A. (2013). The determinants of outsourcing and offshoring strategies in industrial districts: evidence from Italy. *Regional Studies*, 47 (4): 465-479.

Capestro M., Tarantino E., Morgagni F., Tricarico E., Guido G. (2014). Distretti calzaturieri in crisi: cause del declino e strategie di rinnovamento. *Economia e Società Regionale*, 32 (1): 187-212.

Capitello R., Agnoli L., Galati A., Begalli D., Crescimanno M. (2014). Business-to-business service quality assessment in professional wine events: the core of Vinitaly. In Cavicchi A., Santini A. (Eds.), *Food and Wine Events in Europe: A Stakeholder Approach*, Routledge: Abingdon, 110-124.

Carù A., Cova B. (Eds.) (2007). *Consuming Experience*. Routledge: Abingdon.

Charters S. (2006). *Wine and Society: The Social and Cultural Context of a Drink*. Elsevier Butterworth-Heinemann: Oxford.

Chiarvesio M., Di Maria E., Micelli S. (2010). Global value chains and open networks: the case of Italian industrial districts. *European Planning Studies*, 18 (3): 333-350.

Cooke P., Morgan K. (1994). The regional innovation system in Baden-Württemberg. *International Journal of Technology Management*, 9 (3-4): 394-429.

Corò G., Grandinetti R. (1999). Evolutionary patterns of Italian industrial districts. *Human Systems Management*, 18 (2): 117-129.

Corò G., Grandinetti R. (2001). Industrial district responses to the network economy: vertical integration versus pluralist global exploration. *Human Systems Management*, 20 (3): 189-199.

Cutrini E. (2011). Moving eastwards while remaining embedded: the case of the Marche footwear district, Italy. *European Planning Studies*, 19 (6): 991-1019.

Dana L.P., Winstone K.E. (2008). Wine cluster formation in New Zealand: operation, evolution and impact. *International Journal of Food Science & Technology*, 43 (12): 2177-2190.

Dei Ottati G. (2003). The governance of transactions in the industrial district: the "community market". In Becattini G., Bellandi M., Dei Ottati G., Sforzi F., *From Industrial Districts to Local Development: An Itinerary of Research*. Edward Elgar: Cheltenham, 73-94.

Dei Ottati G. (2009). An industrial district facing the challenges of globalization: Prato

today. *European Planning Studies*, 17 (12): 1817-1835.

Dei Ottati G. (2014). A transnational fast fashion industrial district: an analysis of the Chinese business in Prato. *Cambridge Journal of Economics*, 38 (5): 1247-1274.

De Marchi V., Grandinetti, R. (2014a). Industrial districts and the collapse of the Marshallian model: looking at the Italian experience. *Competition & Change*, 18 (1): 70-87.

De Marchi, V., Grandinetti, R. (2014b). I distretti industriali veneti tra crisi ed evoluzione. In Bellandi M., Caloffi A. (Eds.), *I nuovi distretti industriali. Rapporto di Artimino sullo sviluppo locale 2012-2013*, Il Mulino: Bologna, 141-153.

DeMarchi V., Lee J., Gereffi, G. (2014). Globalization, recession and the internationalization of industrial districts: experiences from the Italian gold jewellery industry. *European Planning Studies*, 22 (4): 866-884.

De Propris L., Menghinello S., Sudgen R. (2008). The internationalisation of production systems: embeddedness, openness and governance. *Entrepreneurship & Regional Development*, 20 (6): 493-515.

Di Bernardo B., Grandinetti R. (2012). Contexts of experience. In Belussi F., Staber U. (Eds.), *Managing Networks of Creativity*, Routledge: New York, 229-242.

Di Maria E., Bettiol M., De Marchi V., Grandinetti R. (2012). Developing and managing distant markets: the case of KIBS. *Economia Politica: Journal of Analytical and Institutional Economics*, 29 (3): 361-379.

Doria M.C., Mattiacci A., Nosi C., Zampi V. (2004). Wine clusters and leading firms in Tuscany. In Zanni L. (Ed.), *Leading Firms and Wine Clusters: Understanding the Evolution of the Tuscan Wine Business through an International Comparative Analysis*, Franco Angeli: Milan, 113-192.

Dunford M. (2006). Industrial districts, magic circles, and the restructuring of the Italian textile and clothing chain. *Economic Geography*, 82 (1): 27-59.

Fensterseifer J.E., Rastoin J.-L. (2013). Cluster resources and competitive advantage: a typology of potentially strategic wine cluster resources. *International Journal of Wine Business Research*, 25 (4): 267-284.

Frochot I. (2000). Wine tourism in France: a paradox?. In Hall C.M., Sharples L., Cambourne B., Macionis N. (Eds.), *Wine Tourism Around the World: Development, Management and Markets*, Butterworth-Heinemann: Oxford, 67-80.

Furlan A., Grandinetti R. (2011). Size, relationships and capabilities: a new approach to the growth of the firm. *Human Systems Management*, 30 (4): 195-213.

Furlan A., Grandinetti R., Camuffo A. (2009). Business relationship portfolios and subcontractors' capabilities. *Industrial Marketing Management*, 38 (8): 937-945.

Galletto L., Bianchin F. (2009a). Le aziende vitivinicole del distretto del Prosecco DOC di Conegliano Valdobbiadene: un'analisi campionaria delle innovazioni, dei rapporti distrettuali e del posizionamento strategico. *Economia & Diritto Agroalimentare*, 14 (1): 77-97.

Galletto, L., Bianchin, F. (2009b). La multifunzionalità nel Distretto del Prosecco DOC di Conegliano Valdobbiadene. *Economia & Diritto Agroalimentare*, 14 (2): 149-170.

Gereffi G. (1999). International trade and industrial upgrading in the apparel commodity chain. *Journal of International Economics*, 48 (1): 37-70.

Gereffi G., Humphrey J., Sturgeon T. (2005). The governance of global value chains. *Review of International Political Economy*, 12 (1): 78-104.

Gibbon P., Bair J., Ponte S. (2008). Governing global value chains: an introduction. *Economy and Society*, 37 (2): 315-338.

Giuliani E. (2007). The selective nature of knowledge networks in clusters: evidence from the wine industry. *Journal of Economic Geography*, 7 (2): 139-168.

Giuliani E., Bell M. (2005). The micro-determinants of meso-level learning and innovation: evidence from a Chilean wine cluster. *Research Policy*, 34 (1): 47-68.

Gottardi G., Scarso E. (2009). Reti internazionali nelle calzature sportive. In Gottardi G. (Ed.), *Nuovi modelli di gestione dell'impresa. Governare le reti internazionali di conoscenza*, Carocci: Rome, 200-265.

Grandinetti R. (2011). Local/global interfaces within industrial districts: an Italian case study. *The Learning Organization*, 18 (4): 301-312.

Grandinetti R. (2014a). Le filiere agroalimentari del Made in Italy: alla ricerca di imprenditorialità e di qualche buona politica. In Callegari F., Valentini M. (Eds.), *Filiere d'Italia. Produzioni e reti dell'agroalimentare*, Donzelli: Rome, 251-290.

Grandinetti R. (2014b). Entrepreneurship, network and community in Marshallian industrial districts. *World Review of Entrepreneurship, Management and Sustainable Development*, 10 (4): 449-464.

Grandinetti R., De Marchi V. (2012). Dove stanno andando i distretti industriali? Un tentativo di risposta a partire da un'indagine in Veneto. *Studi Organizzativi*, 14 (2): 142-175.

Gregori G.L., Temeperini V., Perna A. (2013). Quale possibile ruolo delle PMI nello sviluppo del marketing territoriale? Analisi del caso "Land of Value" (LOV). *Piccola Impresa/ Small Business*, 25 (1): 115-134.

Guercini S. (2004). International competitive change and strategic behaviour of Italian textile-apparel firms. *Journal of Fashion Marketing and Management*, 8 (3): 320-339.

Guthy G.T. (2008). Agro-industrial conventions: some evidence from northern California's wine industry. *The Geographical Journal*, 174 (2): 138-148.

Gwynne R.N. (2008). UK retail concentration, Chilean wine producers and value chains. *The Geographical Journal*, 174 (2): 97-108.

Hall C.M., Mitchell R. (2008). *Wine Marketing: A Practical Guide*. Elsevier Butterworth-Heinemann: Oxford.

Harfield T. (1999). Competition and cooperation in an emerging industry. *Strategic Change*, 8 (4): 227-234.

Hervás Oliver J.L., Albors Garrigós J., Dalmau Porta J.I. (2008). External ties and the reduction of knowledge asymmetries among clusters within global value chains: the case of the ceramic tile district of Castellon. *European Planning Studies*, 16 (4): 507-520.

Humphrey J., Schmitz H. (2002). How does insertion in global value chains affect upgrading in industrial clusters?. *Regional Studies*, 36 (9): 1017-1027.

Jenster P.V., Smith D.E., Mitry D.J., Jenster L.V. (2008). *The Business of Wine: A Global Perspective*. Copenhagen Business School Press: Copenhagen.

Markusen A. (1996). Sticky places in slippery space: a typology of industrial districts. *Economic Geography*, 72 (3): 293-313.

Marshall A. (1890). *Principles of Economics*. Macmillan: London.

Maskell P. (2001). Towards a knowledge-based theory of the geographical cluster. *Industrial and Corporate Change*, 10 (4): 921-943.

Maskell P., Bathelt H., Malmberg, A. (2006). Building global knowledge pipelines: the role of temporary clusters. *European Planning Studies*, 14 (8): 997-1013.

Mattiacci A., Zampi V. (2004). Brunello di Montalcino: how a typical wine could revive a poor country-village. *British Food Journal*, 106 (10-11): 767-778.

McCaffrey S.J. (2013). Tacit-rich districts and globalization: changes in the Italian textile and apparel production system. *Socio-Economic Review*, 11 (4): 657-685.

Messina P., Di Maria E., Marella A. Salvato M., Liverta L. (2009). Dinamiche distrettuali e governance del territorio: il punto di vista degli attori locali. In Messina P. (Ed.), *Sguardo al futuro. Il caso del distretto calzaturiero della Riviera del Brenta*, Cleup: Padua, 147-182.

Mistri M. (2012). La conoscenza nei distretti industriali marshalliani e nei clusters tecnologici: percorsi divergenti. *Argomenti: Rivista di Economia, Cultura e Ricerca Sociale*, 12 (36): 59-84.

Morrison A. (2008). Gatekeepers of knowledge within industrial districts: who they are, how they interact. *Regional Studies*, 42 (6): 817-835.

Morrison A., Rabellotti R. (2007). The role of research in wine: the emergence of a regional research area in an Italian wine production system. *International Journal of Technology and Globalisation*, 3 (2-3): 155-178.

Morrison A., Rabellotti R. (2009). Knowledge and information networks in an Italian

wine cluster. *European Planning Studies*, 17 (7): 983-1006.

Munari F., Sobrero M., Malipero A. (2011). Absorptive capacity and localized spillovers: focal firms as technological gatekeepers in industrial districts. *Industrial and Corporate Change*, 21 (2): 429-462.

Murat M., Paba S. (2006). I distretti industriali tra immigrazione e internazionalizzazione produttiva. In Quintieri B. (Ed.), *I distretti industriali dal locale al globale*, Rubbettino: Catanzaro, 177-207.

Nadvi K., Halder G. (2005). Local clusters in global value chains: exploring dynamic linkages between Germany and Pakistan. *Entrepreneurship & Regional Development*, 17 (5): 339-363.

Napoli F. (2010). Risorse di conoscenza e strategie del valore: una verifica empirica sui processi di acquisizione delle aziende di distretto italiane. *Piccola Impresa/Small Business*, 23 (1): 99-128.

Nassimbeni G. (2003). Local manufacturing systems and global economy: are they compatible? The case of the Italian eyewear district. *Journal of Operations Management*, 21 (2): 151-171.

Normann R. (1984). *Service Management: Strategy and Leadership in Service Businesses*. Wiley: Chichester.

Olivero N. (2005). Da Unieuro a Eataly: la lezione della grande distribuzione sulla relazione strategica tra mercato e cultura. *Micro & Macro Marketing*, 14 (3): 471-480.

Oviatt B.M., McDougall P.P. (2005). Defining international entrepreneurship and modeling the speed of internationalization. *Entrepreneurship Theory and Practice*, 19 (4): 388-406.

Paniccia I. (2002). *Industrial Districts: Evolution and Competitiveness in Italian Firms*. Edward Elgar: Cheltenham.

Pastore P., Tommaso S. (2013). Italian industrial districts: influence of the governance on performance and financial distress of firms. An explorative study. *Corporate Ownership & Control*, 11 (1): 962-991.

Petrini C. (2001). *Slow Food: The Case for Taste*. Columbia University Press: New York.

Pietrobelli C., Rabellotti R. (Eds.) (2006). *Upgrading to Compete: Global Value Chains, Clusters, and SMEs in Latin America*. Inter-American Development Bank: Washington.

Piore M.J., Sabel C.F. (1984). *The Second Industrial Divide: Possibilities for Prosperity*. Basic Books: New York.

Pomarici E., Boccia F., Catapano D. (2012). The wine distribution systems over the world: an explorative survey. *New Medit*, 11 (4): 23-32.

Ponte S., Ewert J. (2009). Which way is "up" in upgrading? Trajectories of change in the value chain for South African wine. *World Development*, 37 (10): 1637-1650.

Ponte S., Gibbon P. (2005). Quality standards, conventions and the governance of global value chains. *Economy and Society*, 34 (1): 1-31.

Ponte S., Sturgeon T. (2014). Explaining governance in global value chains: a modular theory-building effort. *Review of International Political Economy*, 21 (1): 195-223.

Porter M.E. (1998). Clusters and competition: new agendas for companies, governments, and institutions. In Porter M.E. (Ed.), *On Competition*, Harvard Business School Press: Boston, 197-287.

Rabellotti R. (2004). How globalisation affects Italian industrial districts: the case of Brenta. In Schmitz H. (Ed.), *Local Enterprises in the Global Economy: Issues of Governance and Upgrading*, Edward Elgar: Cheltenham, 140-173.

Rabellotti R., Carabelli A., Hirsch G. (2009). Italian industrial districts on the move: where are they going?. *European Planning Studies*, 17 (1): 19-41.

Ricciardi A. (2013). I distretti industriali italiani: recenti tendenze evolutive. *Sinergie: Rivista di Studi e Ricerche*, 31 (91): 21-58.

Rolfo S., Calabrese G. (2006). Struttura industriale e profili di competitività nella meccanica strumentale. *L'industria*, 27 (4): 603-622.

Rossetto L., Boatto V., Barisan L. (2011). Strategies and interpreting models of a reformed DOC: the Prosecco case study. *Enometrika*, 4 (1): 57-77.

Rossi M. (2013). Il wine business in un ambiente competitivo in cambiamento: scelte strategiche e finanziarie delle PMI vitivinicole campane. *Piccola Impresa/Small Business*, 25 (2): 11-36.

Sammarra, A., Belussi, F. (2006). Evolution and relocation in fashion-led Italian districts: evidence from two case-studies. *Entrepreneurship & Regional Development*, 18 (6): 543-562.

Sammarra A., Biggiero L. (2001). Identity and identification in industrial districts. *Journal of Management and Governance*, 5 (1): 61-82.

Sciascia S. (2008). Geox. In Alberti F.G. Sciascia S., Tripodi C., Visconti F., *Entrepreneurial Growth in Industrial Districts: Four Italian Cases*. Edward Elgar: Cheltenham, 113-1128.

Sebastiani R., Montagnini F., Dalli D. (2010). I movimenti di consumatori all'assalto del mercato: la rivoluzione "lenta" di Eataly. *Finanza Marketing e Produzione*, 28 (4): 28-53.

Sebastiani R., Montagnini F., Dalli D. (2013). Ethical consumption and new business models in the food industry: evidence from the Eataly case. *Journal of Business Ethics*, 114 (3): 473-488.

Shane S., Venkataraman S. (2000). The promise of entrepreneurship as a field of research. *Academy of Management Review*, 25 (1): 217-226.

Sorrentino M. (2013). L'accounting standard overload: "l'hangman's noose" delle small business anglosassoni. *Piccola Impresa/Small Business*, (2): 85-108.

Steinmueller W.E. (2000). Will new information and communication technologies improve the "codification" of knowledge?. *Industrial and Corporate Change*, 9 (2): 361-376.

Tattara G., Corò G., Volpe M. (Eds.) (2006). *Andarsene per continuare a crescere. La delocalizzazione internazionale come strategia competitiva*. Carocci: Rome.

Thach E.C., Olsen J. (2006). Building strategic partnerships in wine marketing: implications for wine distribution. *Journal of Food Products Marketing*, 12 (3): 71-86.

Thornton J. (2013). *American Wine Economics: An Exploration of the U.S. Wine Industry*. University of California Press: Los Angeles.

Tonchia S., Quagini L. (2010). Luxottica, a new "vision" for the supply chain. In Tonchia S., Quagini L., *Performance Measurement*, Springer-Verlag: Berlin, 95-111.

Tripodi C. (2008). Luxottica. In Alberti F.G., Sciascia S. Tripodi C., Visconti F., *Entrepreneurial Growth in Industrial Districts: Four Italian Cases*, Edward Elgar: Cheltenham, 145-162.

Tunisini A., Bocconcelli R. (2009). Reconfiguring supplier relationships between local and global: history matters. *Industrial Marketing Management*, 38 (6): 671-678.

Tunisini A., Bocconcelli R. (2013). Medie imprese in sviluppo: gli asset relazionali nei processi di integrazione post-acquisitiva. *Piccola Impresa/Small Business*, 25 (1): 9-32.

Ufficio Studi di Mediobanca (2015). *Indagine sul settore vitivinicolo*, Milan: Mediobanca.

Vaudour E. (2002). The quality of grapes and wine in relation to geography: notions of terroir at various scales. *Journal of Wine Research*, 13 (2): 117-141.

Viesti G. (2000). *Come nascono i distretti industriali*, Laterza: Rome.

Visser E.-J., de Langen P. (2006). The importance and quality of governance in the Chilean wine industry. *GeoJournal*, 65 (3): 177-197.

Zamparini A., Lurati F. (2012). Communicated identities of regional cluster firms: evidence from the Franciacorta wine cluster. *Corporate Communications: An International Journal*, 17 (4): 498-513.

Zanni L. (Ed.) (2004). *Leading Firms and Wine Clusters: Understanding the Evolution of the Tuscan Wine Business through an International Comparative Analysis*. Franco Angeli: Milan.