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Global success, local roots.

A study on Conegliano Valdobbiadene and Cava wine districts.

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Abstract

Globalizzazione e squilibri presenti nell'economia italiana derivanti dalla crisi sono fattori che hanno messo a dura prova le piccole e medie imprese presenti nel nostro territorio. Puntare sulle eccellenze produttive che han da sempre contraddistinto la nostra nazione, sembra essere un ottimo mezzo per resistere in un contesto poco favorevole.

Il distretto del Conegliano Valdobbiadene Prosecco Superiore è un ottimo esempio di ciò; il lavoro di squadra di ciascun attore del distretto, a partire dalle aziende vitivinicole fino al Consorzio di riferimento, ha contribuito a diffondere in tutto il mondo non solo questo vino, ma ha anche promosso il territorio nel quale viene prodotto.

L'obiettivo di questo lavoro è perciò presentare tale esempio positivo italiano, sottolineando come un'attività produttiva così legata alla tradizione, alla cultura territoriale e alle relazioni esistenti tra le aziende del luogo, possa allo stesso tempo voler ottenere e mantenere una forte presenza nei mercati internazionali.

Partendo con la definizione del concetto di distretto industriale attraverso le teorie reputate più idonee per il tipo di analisi effettuata, si procederà a descrivere i principali sviluppi di tale modello in ambito comunitario, nazionale e regionale, all'interno della regione Veneto.

Successivamente, si analizzerà nel dettaglio la composizione del distretto del Prosecco utilizzando come linee guida i risultati di interviste sottoposte ad un campione di aziende vitivinicole della zona. Si è scelto di utilizzare tale metodologia per poter meglio comprendere il rapporto che intercorre tra i vari attori distrettuali, l'importanza della promozione territoriale e l'attenzione rivolta ai mercati esteri e al loro sviluppo.

Infine, attraverso la presentazione del cluster catalano del Cava, il quale risulta essere uno dei maggiori competitors del Prosecco Docg nei mercati esteri, si potranno mettere in luce alcuni punti poco sviluppati del distretto trevigiano, concludendo con i possibili sviluppi futuri attuabili per rendere la filiera

produttiva e commerciale ancora più vincente.

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Clusters represent a new way of thinking about location, challenging much of the conventional wisdom about how companies should be configured, how institutions such as universities can contribute to competitive success, and how governments can promote economic development and prosperiy.

Michael E. Porter (1998) Clusters and the New Economics of Competition

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General Introduction

The industrial districts is generally defined as concentrations of small and medium enterprises, institutions, universities and studies centers, located in a certain geographic area specialised in a particular production and integrated through a complex net of economic and social relations.

The competitive advantage of this productive model is funded on the flexible specialisation which permits to efficiently reply to the variation of the demand.

The fragmentation of the productive structure and the characteristic form of social coordination were the elements that permitted to place the district as an alternative of the Fordist industry. (Sabel & Piore, 1984)

Among all the countries where this structure is present, Italy is one of the most significant case since it has constructed part of its competitiveness on them, in many sectors such as the textile, furniture and alimentary.

The value of the regional productive specialisations were able to overcome the national borders for being inserted in the global economy with a great appreciation especially regarding the agri-food sector.

The local culture and the strong links with the territory where the production is set are important elements for the competitive advantage of the districts and represent their distinctive features, as in the case of Conegliano Valdobbiadene Prosecco Superiore.

The appreciation of this wine in the foreign markets is so high that according to recent data, it can be place close to the level of champagne and cava revealing the district actors' commitment to promote the territory in which they operate and increase the presence of the wine in the international markets.

The present thesis is aimed at presenting a case of success through the analysis of the structural composition of the industrial district, the territorial marketing actions and the internationalisation process undertaken. Adding to the work the analysis of the Catalan Cava cluster gives the opportunity of presenting another

reality that in some ways is similar to the Italian, such as in the structural composition of the productive chain, the studies centers and the promotion entities. At the same time, the comparison highlights some points that should be improved in the Prosecco district in order to maximise its positive trend and reinforce the competitiveness of this kind of productive and economic structure.

Chapter 1

THE INDUSTRIAL DISTRICT, ITS RISE AND DEVELOPMENT IN THE ITALIAN COUNTRY AND IN VENETO REGION.

1.1 Approaches to the theories of Industrial District.

Several scholars tried and are still trying to give the most complete, correct and satisfactory definition to the concept of industrial district/cluster[1]. Not only economics but also sociologies and humanists have their say about the idea that lies behind the term. Among all the myriad of people who gave their own definition, it is important to recognize the primacy of the noted English economist Alfred Marshall (1842-1924).

He is commonly accepted to be the first to have explained the origins of industrial concentrations and to have acknowledged the connection between economic productivity of firms and the business results originated from location and proximity of economic actors.

In chapter X of his book *Principles of Economics* (1890), he focused on the concentration of specialised industries in defined localities, affirming that the main causes of localization of industries are related to physical conditions such as weather, soil and strategic geographic position.

Through the analysis of some textile industries in England, he stated that competitive firms in similar industries from a given sector, usually localised in the same geographical area (Marshall, 1890). Their proximity brings direct benefits such as the availability of skilled labour or the specialization in different branches of production.

Marshall also identified three main reasons why firms resulted to be more productive if they were concentrated in a group of companies rather than being

1 The present work does not make any relevant distinction between the term cluster and industrial district. When the Italian case is taken into account, the term *industrial district* is used as it refers to the theory of Italian industrial districts.

separated and settled in different places.

Firstly, firms that were parts of these concentrations were composed of a pool of workers with similar abilities which brought a knowledge transfer and an improvement of industrial skills as consequent advantages. Furthermore, due to the high presence of possible employers demanding workers, there was a reduction of unemployment risk.

Secondly, the development of a division of labour benefited the level of specialization and led to increase the cooperation among the firms. This is an important advantage for the suppliers but also a huge benefit for customers.

Finally, Marshall noted that the industrial district experienced an easier flow of ideas and knowledge due to the short distance between firms. The structure of the clustered firms was represented as a fluid and stable economy, where the development of a cultural identity rooted in the territory and the evolution of a shared proficiency were both possible.

The famous Marshall's “industrial atmosphere” that is present in a district is the most fundamental resource. In fact, it is defined by the formation of a collective identity and a sense of belonging to a community (Marshall, 1890). The industrial district is the results of a slow and spontaneous process of self-education for the members of the community, that learned unconsciously as if knowledge was in the air.

As reported in *The Cluster Policies Whitebook* (2004), Marshall has contributed to forge the idea that firms decide to cluster for benefiting from positive externalities linked with their respective activities. The common location of firms specialised in a particular asset, may brings a reduction in the cost of production for each of them.

The close proximity might also facilitate or accelerate circulation of ideas and information among the actors operating in the district, leading to the implementation of innovation. Flow of knowledge, productivity and innovation are all benefits brought by the specific characteristics of the industrial district.

However, it is important to outline that even if the industrial district is specialised in a particular sector, firms are not necessarily homogeneous in the phases of production.
Luisa Debernardi in her working paper n°1/2005 affirmed that industrial districts could be:

- Vertical or converging, when firms are specialised in different phases of production;
- Lateral, when firms are specialised in similar activities in the same production;
- Diagonal, when firms are specialised in operations subsidiaries to the district such as reparation, transport etc.

The differentiation in different phases of production is interesting for understanding the structure of the district, delineating its characteristics and fixing the roles attributed to the economic actors inside it.
After Marshall, in the following years many other economists and social scientists dedicated their attention to this theme not only in an economic perspective but also in a more social one.
In the Seventies, the concept of industrial district started to be used, especially in the Italian context, to understand the economic transformation of those years. The rapid growth in demand for non-standardized goods, the increase of the labour cost and the diffusion of new electronic and information technologies helped the small enterprises to successfully compete with larger enterprises.
Moreover, the decline of the Fordist model made possible the affirmation of a new way of industrialisation in which the industrial districts were the flexible organization requested. As reported in prof. Corò and Micelli's book, *I Nuovi Distretti Produttivi* (2006), the new form of production organization based on SMEs responded to the increasing complexity of the consumption model and to

the diffusion of automation and communication technologies.

Both phenomenons permitted to reveal the rigidity of the large enterprise and the faster growth of new business systems in responding to the new needs and in stimulating innovation. The small firms have the advantage of having an high specialisation in the production of goods, due to that they have the possibilities to easily reply to the changes in a market. Moreover, the small dimensions permit a major flexibility, an easier administration and a closer contact with customers.

The SME system was not only a variation of the previous model, but it was a model that embraced several and different sectors of the society and was governed by values of trust and cooperation.

The industrial district is a socio-territorial entity where there is an active presence of a community of persons and a population of industrial firms, in an area determined by history and nature. (Becattini, 1989).

The Italian economist Giacomo Becattini (1989), made a reinterpretation of Marshall's theories on the I.D. phenomenon analysing it through a more social point of view.

He identified three vital levels for the formation and the survival of the district. Beside the companies in the district, there is a community of people and a system of values which contribute to the maintenance of the structure's stability. These two elements are indivisible due to the fact that the community shares values accumulated over the years, that finally bring to the formation of a common ethic.

More precisely, Becattini believed that there was a common set of values among the community that made possible a strong cohesion unusual in the larger firms. The key of success in this economic system lies in the historic accumulation of technical know-how, knowledge transmissions and the existence of a local net of industrial relations connected to the necessity of the central firm. The sole competition among firms is replaced by the creation of a collaboration and competition balance between the firms that work for the main production and the firms specialize in subsidiaries activities. This is a clear evidence of the strong sense of belonging to a collective system inside an industrial district.

In addition, a system of institutions and regulations has to be established to permit the transmission of knowledge and values from one generation to the other.

The school system is highly important, especially nowadays, to form the technical background fundamental for the continuation of the profession and to develop the entrepreneurial skills.

Becattini (2000) strongly believed that institutions, such as schools or public administration, were effective links between the productive fabric and the community-district. He proposed a development model in which not only the economy, but also geography, sociology, politic and social capital played an important role. Becattini approached the economic aspect of the industrial district to the cultural facets connected to it.

Among all the scholars who studied the phenomenon internationally, the American economist Michael Porter, is the one who has strongly emphasized the link between territorial clustering and economic advantages worldwide.

In one of his book, *The Competitive Advantage of Nation (1990),* he made the concept of clusters popular with the use of his "diamond model" scheme in order to represent in a simply and effective way how clustered firms can reach the biggest competitive advantages.

He believed that companies reached success through innovation which could be manifested in its broadest sense, such as a new design or a new marketing approach. Very often innovation brings with itself competitive advantage by creating new market opportunity or by serving some economic niches that others have instead ignored.

Porter (1990) used the diamond model to explain the concept of cluster. It is a graphic representation of all the necessary steps to be taken in order to reach the biggest competitive advantages.

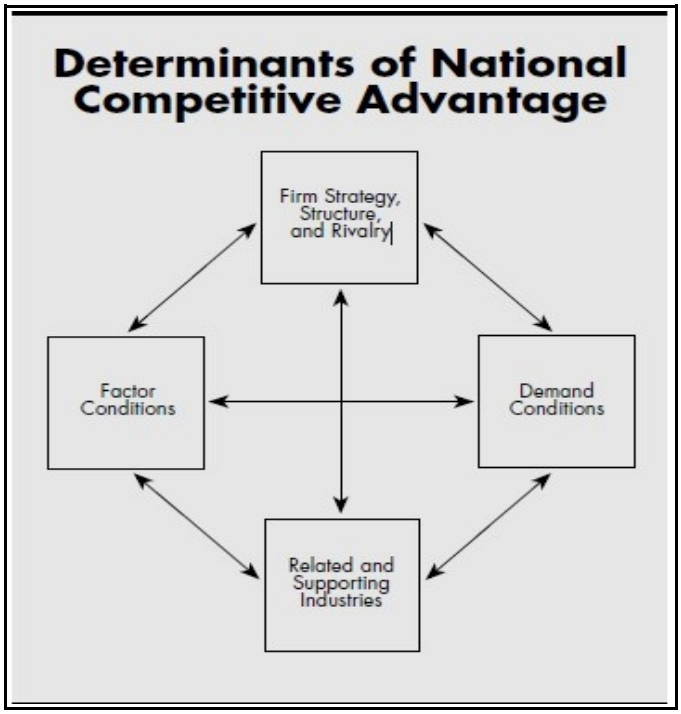

Fig. 1: Porter M. E. (1990) *The Competitive Advantage of Nations,* Harvard Business Review p. 78.

In Porter's opinion, competitive advantages were consequences of the following elements:

- Factor conditions: the position of a nation in factors of production necessary to compete in a given industry;
- Demand conditions: if the customers are particularly demanding, companies will improve faster;
- Supported industries: the presence or absence of related and supporting industries that will permit or impede the flow of knowledge and abilities;
- Strategy, structure, rivalry and direct competition: useful tools for firms to become more productive and innovative.

Porter (1990) believed that clusters, an array of linked industries and other entities

important for competition such as suppliers of specialised inputs (components, machinery and services) and providers of specialised infrastructure, were able to influence competition as follows:

- Through increasing the productivity of the firms composing the cluster;
- Through guiding the innovation;
- Through stimulating new business.

In a cluster, it is known that the proximity is fundamental to share the specialization of competence, the secular knowledge and the workforce. Universities and other institutions play an important role to increase the abilities of people working in it and also to make the entire economic system more globally visible through cultural events such as exhibitions, international conferences etc.

Government must also have an active attitude on the subject in order to eliminate everything that can impede the productivity and innovation of the cluster and permit its development. By encouraging the firms in stimulating their performance, the government covers an important role inside the economic structure. (Porter, 1990).

Through cooperation and permanent links formed by the tradition grown during the years, a small industry can be part of a larger system without loosing its peculiar characteristics.

The interaction among the actors is undoubtedly fundamental inside a cluster/industrial district, for a commercial, economic and also social point of view. It is an economic structure fully complete and well-organised in itself that contains tradition and innovation at the same time.

However, a question can reasonably arise regarding the possibility that the economists analysed so far would have made any substantial distinction between the terms industrial district and cluster.

A possible answer to the question can be found in *Clusters and competitiveness* (2010) where is reported Becattini's idea that industrial district is born as a local society specialised in a particular type of product. On the contrary, cluster is born as a territorial agglomeration of companies dedicated to a specific production. In both systems there is a mix of cooperation and competition, but the competition is stronger when the system of firms is in a local society so in the case of the industrial district. Becattini (2010) considered the concept of industrial district more human, in fact in his opinion cluster regarded man as an economic agent and its aim is achieving economic and social well-being. The industrial district is not only concerned with being competitive, but it is also strictly connected to social factors and the territory where the economic structure is set.

In Becattini's book, *Dal Distretto Industriale allo Sviluppo Locale* (2000), Porter was pointed as the first to refer to the industrial district with the name of cluster, a new and more Anglo-Saxon way of referring to them. In his opinion, the two approaches come close and respect each other but they remain apart considering their own view more comprehensive than the other's.

Apart from this consideration, for writing this thesis it was decided to use the term cluster when referring to an international context such as the European Union intervention in the matter. Instead, when the Italian situation is considered, the term industrial district replaces the other for being more connected to the Italian theory on the topic[2].

1.2 The rising importance of the industrial district in the Italian economy.

It has already been said that the seventies were a decade in which several transformation affected the world's industrial economies and the Italian as well.

At the end of the sixties, mass production in large enterprises had to cope with cultural and political tensions as well as technological and market challenges.

2 For further information regarding the different names used for referring to this industrial structure, please see: Europe Innova (2008), Cluster policy in Europe, Oxford Research AS.

In this context, the concepts of small firm and industrial district resurfaced as successful models in a period of contraction in market demand and resources, monetary instability and rise of new challenges related to the emergence of new customer's needs.

In the Italian background, this period was important because has highlighted an area that was underestimated during the Fordism.

In 1977 Arnaldo Bagnasco's book, *Tre Italie. La problematica territoriale dello sviluppo italiano,* was published. The book proposed another idea of the Italian territorial system that departed from the North-South dichotomy. In fact, in the author's opinion there was another macro-region which differed from the other two for its economic characterisations.

Instead of the traditional North-South dichotomy, there is a complex system composed of three social formations each of which differs from the others in terms of economic structure, social organization and political system (Bagnasco, 1977).

The three areas identified by Bagnasco are the following:

- The North-west which was the engine of the country, fuelled by the Fordism;
- The South which constituted the weak part of Italy, not self-sufficient;
- The central and North-East regions (**Veneto**, Friuli-Venezia Giulia, Trentino-Alto Adige, Emilia-Romagna, Toscana, Umbria e Marche). A section of the country characterised by an economy based on small enterprises.

Bagnasco affirmed (1977) that in an economy where there were two opposed areas, the North with its industrial development supported by the cities of Turin, Milan and Genoa, and the South with its peripheral areas, started to emerge an intermediate model of industrialisation.

This is the central and North-East Italy, which is also called the small business Italy (Bagnasco, 1977).

In this area, industrial districts found perfect conditions for their development, also due to the fact that the small enterprises resulted to be more flexible and reactive than the model of mass production which was suffering for the crisis of Fordism, and the resulting changes in the global industrial landscape.

Small firms in fact, if grouped together under certain conditions, are able to create something big and functional through the formation of a dense network of relations.

The Italian professor Federico Visconti, in his book *Le condizioni di sviluppo delle imprese operanti nei distretti industriali* (1996) outlined the constituent elements of a district as follow:

- Territorial delimitation.

  The district in fact is strongly attached to the territory, which has peculiar characteristics that makes it different from the neighbouring areas.
- Community of people.

  In a district, the presence of people with common values in the working aspect but also in the social sphere is fundamental. The culture inside the territory penetrates into the activities of the firms and creates the Marshallian "industrial atmosphere".
- System of firms.

  The district is usually characterised by a group of SMEs and each of them are focused in a particular processing phase. Visconti (1996) states that the relations inside the district might be complex as they generates cooperation and direct competition at the same time. However, the combination of the two aspects creates a labour market characterised by high professionalism and competences. There is also the important possibility for new enterprises to develop themselves, as both mobility and

variety are present in the system.

- Role of institutional actors.

  The last point is the evidence of how the district is surrounded by several social figures that help and facilitate its functioning.

The district is a business model, in fact it is not only a consequence of the structural economic and productive changes of that time, but it also express the efficiency of the Italian small and medium enterprises. (Visconti, 1996).

The phenomenon is typical in the Italian local economies, it is not only an element connected to the tradition of the area but it is also an important factor of growth in the international context. As affirmed by Visconti (1996), their role in the Italian economy is fundamental especially if the number of firms incorporated, the occupation and the export numbers are taken into account. Furthermore, their flexibility and competence in traditional sectors such as clothing and food, made possible for Italy to gain a dominant space internationally .

At the middle of the eighties, the competitive nature of the Italian district was in trouble due to the chronic maturity of the internal market, the decreased competitiveness of Italian exports especially in prices, and an increasing competitive pressure developed by the emerging competitors in the lower segments of markets. (Becattini, Bellandi, Dei Ottati e Sforzi, 2001). Besides the market dynamics, the technological evolution put pressure for change especially regarding the reorganization of the working phases. The impact in the districts was relevant, the necessity of working in broader competitive context forced to develop specific competences in the field of innovation and distribution structures. One of the recognised limits of the I.D. is related to the too small dimension of the firms for facing investment plans and the scarcity of financial resources (Visconti, 1997). However, at the beginning of the Nineties, the crisis of districts came to an end, especially after the resorption of the penalty on the real exchange rate (Becattini, Bellandi, Dei Ottati e Sforzi, 2001).

Regarding the current situation, Valter Taranzano, the president of Federazione Distretti Italiani[3], has said that the Italian districts are replying actively to the crisis, showing themselves to be the strong power in the country (Ferraris, 2012). They are a reference model for the modality of interaction and collaboration between firms, for their propensity to invest, their access to new markets through the exports, their capacity of unifying different roles and generating process with a high level of innovation and, finally, for their interest in sustainability.

Nowadays, industrial districts are continuously improving themselves through putting more attention to the commercial components aimed at a closer contact with the customers and a more active attitude towards operating in foreign markets.

The districts are the way through which Italy has built its competitive position in the international markets, where the global economy is highly interested in the value of the craft skills. They are the mean through which local culture and global competitive advantage could coexist.

However, to keep up with the time in a world increasingly globalised, some changes are necessary and have already started.

Ferraris (2012) reports four indicators of this process of modification, four things that need to be fixed in order to successfully overcome the economic crisis.

Firstly, the strengthening of supply chains is fundamental. In fact, the production has started to broaden the border of the district for rationalizing the costs and gaining better skills. The action is not going to change the legacy with the territory because it is a pillar through which every industrial district is built. On the contrary, through those firms that have internationalised their production, the district gains in terms of increasing its net of relations.

Secondly, a change in the criteria for the selection of the partner seems to have been modified. The capacity of the partner to plan with the client is gaining a lot of importance as much as the supplier's reliability and his delivery speed.

3 Federazione Distretti Italiani is an organisation born in 1994 in Biella, Piedmont. Its aims are basically to guide and promote the development of the italian districts.

(Ferraris, 2012). The creation of strong links with universities and research centers make possible the formation of a closer contact with innovation.
Thirdly, the export represents another useful weapon against the crisis.
When the internationalisation process is considered, four models of enterprises can be distinguished by their level of entry into markets (Corò & Micelli, 2006):

- Traditional firms, those that are keeping the production in the territory and simply sell the products abroad;
- Companies with abroad business projection, which have started an investment program aimed at increasing the control of markets through their presence in other countries;
- Firms that activate a process of internationalisation of production by foreign direct investments (FDI), in order to regain competitiveness through cost reductions;
- Global firms, those that have a global projection not only through the export of the product but also through physical presence in the international markets.

Actually, the more widespread inside the industrial district is the first one, that is the so called traditional firms. Enterprises are linked to the territory and sell their products abroad using traditional ways such as the export channel. On the contrary, firms with a more global projection are easier to be found in the automotive supply chains where the roots on local basis decreased (Coro' and Micelli, 2006).
Even if the industrial districts reach a satisfactory level of sales abroad and some of them have affiliates outside the national borders, it is still difficult to attract investment, funds and foreign firms. This is a problem together with the credit crunch of the time that could slow their development.[4]

4 Due to lenght reason, it is impossible to develop in deep the topic connected with the current crisis. For further information, please see: Ferraris G., (2012) *Distretti. Culture locali e*

Finally, the last innovation is related to the environmental protection. In fact as Ferraris (2012) reports, one firm out of three declared to have activated a green way of doing business, especially regarding the tanning industry. In fact, 95% of the used water is purified and 75% of the waste is recycled to produce fertilizers or other useful products.

The ceramic district of Sassuolo is also noteworthy due to the fact that all the waste materials produced during the packaging of the tiles are reused, resulting to be the cluster with the lower environmental impact.

In summary, the industrial districts in the Italian case are a referential model for the way in which interact and collaborate among the included firms and their desire to keep up with the times.

Their unparalleled hallmarks are not only their characteristic way of organizing the productivity process, but also the social and cultural environment in which the enterprises operate.

The proximity and the social coexistence have originated the development of a collective knowledge which supports the specialisation of competences, the differentiation of functions inside the industrial agglomeration and the sharing of knowledge learned during the years.

These elements help the small and medium enterprises to feel part of something bigger, "a community where the entrepreneurship tends to be express around the typical production of the area". (Visconti, 1996: 58).

In fact, the development of small firms system is related to a culture of ancient origins, when the decision of starting a business activity was a pioneering idea of some craftsmen. Most of the time, the starting point is originated by already existing industrial activities, and this elements contributes to highlight the historical significance of the production.

The economic forces that originate the tendency of enterprises to cluster together are the formation of a specialised labour market, the creation of a pool of intermediate goods and the existence of knowledge spillovers. (Corò & Micelli,

vantaggio competitivo. Milano, Baldini Castoldi Dalai editore Spa.

2006).

These three elements have contributed to the creation of sharing cultural aspects inside the district and also have stimulated an activity of co-makership among the actors recreating the famous Marshallian industrial atmosphere.

Hence, whatever its origins are, the district has the power to transmit values of creativity and innovation, to create a process of gradual accumulation of knowledge and to foster the formation of a prosperous context, also from an institutional point of view, for the expression of the entrepreneurial potential.

The origin of this economic system is the result of two mechanisms. The disintegration of one or more large enterprises and the rapid growth of an industrial craftsmanship core rooted in the history of the territory (Becattini, 1998).

Nevertheless, the forces that made possible the formation of an industrial district and its survivor are the strong attachment to the territory and the local entrepreneurship. In the industrial district, each firm specialised in a particular phase of production is strictly connected with the others as if they were a single enterprise. This characteristic has enabled the efficiency of the system.

At the same time, innovation plays a fundamental role regarding the development of the local systems. The desire of renewing, keeping up with the times and satisfying the consumers' needs are essential for an industrial district. Furthermore, the balance of competition and cooperation between the actors of the district is another important element for stimulating productivity and innovation.

Since industrial districts are receiving a global widespread attention as an instrument for helping firms to overcome the internal limitation by joining resources and efforts with other firms, universities, R&D institutions in pursuit of a common vision (Andersson T.,Schwaag Serger S., Sörvik J. & Wise Hansson E., 2004), it is important to have an idea of the European attitude and disposition towards them.

1.3 European approaches to the theme of clusters: the European Cluster Alliance and TACTICS.

During the 1990s several European countries focused their attention to industrial districts/clusters because they were thought to be fundamental components for the development of national industrial policies. (Borrás S., Tsagdis D., 2008).

There was a general acceptance that flexibility and resources of local production systems were tools of job creation and an effective response to globalisation and its challanges.

All the forces were addressed to the reinforcement of public-private partnerships for the development of the territory, the reinforcement of local networks of SMEs, the development of a more horizontal approach to industrial policy, an increased emphasis on territorial improvements of framework conditions and a growing interest on boosting the knowledge base and the learning abilities at sub-national levels (Borrás & Tsagdis, 2008).

This new cluster-approach policies have not substituted other economic policies, on the contrary they have been complementing the traditional sector policy giving them a more territorial shade.

At that time, most European countries activated a decentralisation process of their political structures, letting sub-national powers such as regions and municipalities the possibility of leading the government quite independently.

In addition to this, national governments transferred power to supranational and international levels and through reforms and enlargement rounds, the EU has finally obtained new regulatory powers and financial resources in relation to market-creation, correction of negative economic externalities, economic and monetary policy and wealth redistribution. (Borrás & Tsagdis, 2008).

Since 2000, EU has been determined to create a competitive and dynamic knowledge-based economy, and today it is still actively contributing to the development and coordination of innovative projects focused on clusters and local production systems.

In the European Commission website, there is a section completely dedicated to clusters, where they are described as follows:

> Clusters are powerful engines of economic development and drivers of innovation in the European Union. They provide a fertile business environment for companies, especially SMEs to collaborate with research institutions, suppliers, customers and competitors located in the same geographical area. (EC website – Enterprise and Industries)[5]

The EU is continuously searching for excellence and for this reason in 2006 it adopted a broad-based innovation strategy and identified strengthening clusters in Europe as priorities for promoting innovation. (EC Commission, 2008).
It was recognised that forward-looking public policies, business initiatives, universities and research institutes have been an useful instruments in the emergence of powerful clusters. They result to be useful for the economies of the countries because they act as a catalyst and help to unleash the potential of particular regions.
The European policy framework included:

- The establishment of an European Cluster Policy Group in order to best assist EU countries in supporting clusters;
- The development of policy dialogue between the European Cluster Alliance;
- A vivid cooperation between cluster organisations;
- The promotion of excellence in cluster organisation;
- The development of the the European Cluster Observatory until it reaches the level of information service for enterprises.

5 The website of the European Commission from which the quotation is taken is the following: http://ec.europa.eu/enterprise/policies/innovation/policy/clusters/

Progress has been made in the field of promoting a closer cooperation between cluster programmes from different nations and regions.

The European Cluster Alliance has been fundamental in bringing together several agencies, ministries and public administrations with the common goal of designing and implementing cluster policies.

The European Cluster Alliance (ECA) is one of the most important tool to be updated on the international situation regarding the theme. ECA is an open platform aimed at maintaining a policy dialogue at EU level among regional and national public authorities responsible of the cluster policies in their countries. It is established under the Competitiveness and Innovation Programme (CIP) of the European Commission.[6]

Its formation was requested by many EU Member States in order to share opinions and experiences, and avoid the risk of fragmentation of cluster initiative in Europe. It is part of the PRO INNO Europe initiative which is in turn part of the Competitiveness and Innovation Programme, a project that has already developed several initiatives and programmes in support of cluster policy makers and their will of transnational cooperation. The creation of the European Cluster Observatory and the Cluster Excellence initiative is an example of their activity.[7]

Founded in September 2006, ECA was welcomed as an extremely important European initiative, especially regarding the possibility of facilitating cluster cooperation and increasing the internationalisation process. Its peculiarity is its easy access for any European cluster policy makers or funding agencies that want to develop a joint activities.

The objectives of this European action are reported in the website dedicated to its description and can be summarised as follows:

- to share the experience of cluster policies in order to develop better policies in the future;

6 Information were gathered from the ECA website: http://www.eca-tactics.eu/eca

7 For further information, see their websites: http://www.clusterobservatory.eu and http://www.cluster-excellence.eu

- to become the single place at EU level concerning the cluster policies and the related funding initiatives, exchange of ideas and cooperation at policy level;
- to raise the level of cluster policies in excellence as well as efficiency in order to create a more competitive world-class clusters in Europe.

The Alliance is determined to promote and intensify its contribution to cluster policy dialogue at all levels, so that it would be easier the emergence of new competitive industries in Europe under the structure of a cluster.

Its members pretend to have a direct involvement in the policy building process, through direct participation and implementation of new mechanisms and founding initiatives.

A strong interest in going beyond the simply dialogue is present, encouraging the development of cluster policy actions aimed at giving a direct impact on competitiveness and performance of clusters. By doing so, it will accelerate their internationalisation and benefit the SMEs as well. There is also a strong will of developing these ideas also in non EU countries, such as the Mediterranean basin, stressing again the importance of a common way of addressing the issue.

TACTICS is another interesting project at European level. Its name is the acronym of Transnational Alliance of Clusters Towards Improved Cooperation Support. The starting date was September 2009 and it had the duration of 36 months. Its aim was to address a number of new challenges related to cluster development in Europe and to support the work of the European Cluster Alliance.

TACTICS project facilitated the improvement of cluster policies, tools and incentives in order to foster international cluster cooperation, cluster excellence and cluster marketing and branding.

Its partners were represented by a core group of regional public innovation agencies and a Reflection Group in which there was Veneto Innovazione, an Italian agency that is specialised in supporting the development of the SME. The

Reflection Group was composed of experts that had elaborated the policy recommendations proposed by the European Cluster Policy Group and had individualised the best ways for their implementation.
The members of the Reflection Group was involved in 6 task forces during the project life and each task force hold two workshops.
The initiative was a focal point in matters of innovation policy analysis and cooperation at a supranational level through proposing supporting initiatives.
The projects here described are only a few of the several activities aimed at reinforcing the cluster policies at the European level. However, it is sufficient enough to give an idea of how important the topic is not only for the single nations but also at EU level.
European Union is still trying to implement and monitor the situation in order to develop the potential of the active clusters located in the regions.
If national and supranational collaborate in pursuing the same objectives, important results can be reached in the field of promotion and improvement of this economic structure.

1.4 Principal national regulations for the industrial districts of the territory.

Regarding the national situation, it is interesting to have an idea of how the regulatory system worked and is working for the promotion of the industrial districts.[8]
They were legally recognised with the actuation of the law number 317 of 5th October 1991. Its purpose was to promote development, innovation and competitiveness of the small enterprises organised in cooperative forms.

> Si definiscono distretti industriali le aree territoriali locali caratterizzate da elevata concentrazione di piccole imprese, con particolare riferimento al

8 Regulations were taken from Distretti Industriali Italiani website: http://www.distretti.org/normative

rapporto tra la presenza delle imprese e la popolazione residente nonché alla specializzazione produttiva dell'insieme delle imprese. (art. 36)

The article 36 gives a definition of industrial district as a geographical area where there is an high presence of small and medium enterprises strictly connected with the resident population and the productivity specialisation.

The law not only defined the structure of the industrial district but also urged the Italian government to identify every district in the national territory on the basis of specific criteria set by the Decreto Guarino[9], which finally resulted to be too rigid and insufficient to portrait the real situation.

The cited law is the evidence of the increasing importance assumed by the districts and the SMEs in the eye of the political and productive world at that time. It was the first step forward the protection and the support of an economic development of the territory. Due to the difficulties related to too rigid criteria for the identification of the areas connected with the industrial district, the law number 140 actuated in 1999 brought an useful simplification. It introduced qualitative requirements that made regions more free in identifying their local productive systems. Noteworthy is the law number 266 of 7th august 1997, because contained the will to finance any interventions regarding the industrial districts. Unfortunately, the regions have the opportunity to concretely actuate the government incentives only from the Second Millennium for regulatory delays. (Unioncamere, 2009).

The establishment in 1994 of an organisation, *Il Club dei Distretti Italiani,* aimed at increasing the dialogue among the firms constituting the agglomeration is fundamental for understanding the widespread importance covered by I.D..[10]With the passing of the year, the topic has became more and more nationally important and the organisation captured so many adhesions that in 2004 became

9 Decreto Guarino was an implementing decree imposed in April 1993, for the identification of the areas in an industrial district. Eurosportello Veneto, 2008.

10 Information taken from Distretti Industriali Italiani website.

Associazione Distretti Italiani. The growing importance associated with Italian industrial district matter, also from an institutional point of view, made possible another step forward, in 2007 the association became *Federazione dei Distretti Italiani*. The association simplifies the dialogue between the nets of enterprises and the different production chains and at the same time it is focused on the promotion of the Italian economy based on the industrial districts and the tradition and culture connected to them. The recognition of this economic structure through a legal point of view is fundamental because it has made possible the access to tax, administrative and financial benefits to be allocated for research and development (R&D). The industrial district system was nationally recognised as an useful tool for the development of the country and every Italian regions had also the possibility of implemented their own policies.

1.5 A focus on Veneto: principal regional regulations.

Regarding the situation in Veneto, it must be said that the region is one of the most latecomer in terms of regulations protecting the industrial districts located in the territory.[11]

Veneto forms part of the *Terza Italia* area promoted by Bagnasco and it is considered an emblem of the North-east economy founded on small enterprise. As reported in professor Tattara's book, *Il Piccolo che nasce dal Grande* (2001), at the end of the Second World War Veneto contained in its territory some large enterprises and several small firms of the craft sector. The small urban centers contained traditional and cultural knowledge and made possible the future birth of entrepreneurship.

11 The first identification was done in 1998 with the DGR number 23 even if it never reached the ratification of the Regional Council. Several resolutions were enacted showing the Region's interest in the themes, until the regional law number 8, 4 april 2003 which is the most important for the recognition of the I.D. in Veneto. For further information, please see: Carminati M., La legislazione italiana e regionale sui distretti industriali: situazione ed evoluzione. 2006

Large pool of workers and low cost of labour were fundamental for the industrialisation of the region, which started its full delineation after the Second World War when the exports were supported by a strong foreign demand for Venetian quality. The high demand for the competitive Venetian productions stimulated the rise of several small and medium enterprises.

Even if during the Seventies the economic context was not profitable due to monetary and oil crisis, Veneto region found its own way to react to the situation. In fact, it was recorded a rapid development of the tissue formed by small enterprises, which were family-managed and specialised in productive sectors that were distinctive for the area.

During the Eighties more attention started to be taken towards the structure of the industrial district, after having acknowledged that the Fordist model of production was not the more appropriate for the Italian economic structure. For this reason, it was decided to prefer the SME organisation, which was characterised by more flexibility and self-organisation. During these years, the industrial district consolidated its position as the most profitable economic organisation for the region, and it turned out to be an important pillar for not only regional but also national industries. (Tattara, 2001).

The growth of the system is considered to be connected with the high level of investments supported by the region which has made possible the revival of hidden capacities and resources. Veneto is one of the region where the local institutions have played an important role in promoting entrepreneurial development and in supporting enterprises (Erik Network, Veneto Innovazione, 2007).

The regional law number 8 of 4th April 2003, defines the interventions in support of the industrial agglomerations of the area (*distretto* e *metadistretto*) giving the criteria for their identification as expression of natural vocation of specific areas (Erik, Veneto Innovazione, 2007). The law makes a distinction between district and meta-district. Both were identified through giving the minimum number of firms and employees needed inside the structure. The meta-district has to be

composed at least of 250 firms and 5000 employees, instead the district has to include at least 100 firms and 1000 employees.[12]

Every three years a Development Pact (*Patto di Sviluppo*) must be presented to the competent bodies, *Province* and *Camera di Commercio*, in order to show the development of a strategic planning. The issuance of the regional law n. 8 is relevant because represents the strategic importance gained and institutionally recognised for the economy of the region. However, on 16th march 2006 the text was integrated with the emission of another regional law which pretends to be more exhaustive in relation with the protection of SMEs system, as they are a vital tool for the economic development of the region.

Productive districts are an economic structure highly present in the region and according to the Venetian Clusters website, that is administrated by *Regione del Veneto*, the industrial districts that can be found in the region are the following (divided by provinces and reported in the original language):

Belluno:

- Distretto del'Occhiale;
- Distretto delle Energie Rinnovabili;
- Distretto delle Dolomiti e della Montagna Veneta;

Padova:

- Distretto Veneto del Condizionamento e della Refrigerazione industriale;
- Distretto Biomedicale Veneto;
- Metadistretto della zootecnica del Veneto.

12 Information taken from the website of Consiglio Regionale del Veneto: http://www.consiglioveneto.it/crvportal/leggi/2003/03lr0008.html

Rovigo:

- Distretto del settore Ittico della Provincia di Rovigo;
- Distretto Vento della Giostra;
- Distretto Turistico del Polesine e del Parco del Delta del Po;

Venezia:

- Distretto della Calzatura;
- Metadistretto Turistico Veneto;
- Metadistretto Veneto dei Beni Culturali ed Ambientali;

Verona:

- Metadistretto Alimentare Veneto;
- Matadistretto Logistico Veneto;
- VeronaProntoModa – Distretto Veneto dell'Abbigliamento;
- Distretto del Marmo e delle Pietre del Veneto;
- Distretto Calzaturiero Veronese;
- Venetoclima - Distretto Veneto della Termomeccanica;
- Distretto Veneto del Vino;
- Distretto veneto dell'Informatica e del Tecnologico Avanzato.

Vicenza:

- Distretto Nord-Est Packaging;
- Distretto Orafo-Argentiero;
- Metadistretto della Meccatronica e delle Tecnologie Meccaniche

Innovative;

Treviso:

- Metadistretto DigitalMediale del Veneto;
- Distretto dello Sportsystem di Montebelluna;
- Metadistretto Veneto della Bioedilizia;
- Distretto Produttivo della Bicicletta;
- Distretto Veneto Lattiero-Caseario;
- Distretto Veneto Sistema Moda;
- Distretto Multipolare Veneto della Gomma e della Materie Plastiche;
- Distretto Veneto delle Attrezzature Alberghiere;
- Metadistretto Veneto del Legno-Arredo;
- Distretto florovivaistico Veneto;
- Distretto Veneto dei Sistemi per l'Illuminazione;
- Distretto del Prosecco di Conegliano-Valdobbiadene.

The list reports the industrial districts currently in force in the Venetian territory. Each of them is required to be contained inside a specific regulatory framework in order to facilitate the individuation and the consequent monitoring of its activities. In the following chapter, it will be analysed the structure of one of the most productive and internationally recognised district of the region, that is specialised in the production of the *Conegliano Valdobbiadene Prosecco Docg*.

CHAPTER 2

The industrial district of Conegliano Valdobbiadene Prosecco Docg: the territory, the wine, the economic actors and the international success.

At the end of the previous chapter, the industrial districts present in Veneto region were listed. Among the ones located in the province of Treviso, there is the wine district of *Conegliano Valdobbiadene Prosecco Superiore.*

The first part of the chapter is dedicated to the analysis of its structure, starting from the description of the area where it is set and then presenting the most important actors composing the productive structure.

The second part of the chapter is instead focused on the analysis of the latest data regarding the international trade and the description of the modality of entry into foreign markets used by firms of the district.

Before starting the analysis, it would be helpful to give some data regarding the situation of the wine sector in Veneto.

According to the Report 2012 edited by *Veneto Agricoltura*, the production in the agri-food sector has reached a record of 5,34 billion euros and has also recorded a small but interesting growth. Paolo Pizzolato, the special commissioner of Veneto Agricoltura, affirms in an interview for a local TV channel that there are several positive signals arriving from the sector. Even if some companies were forced to close, there are just as many if not more that are hiring staff. For this reason, it is possible to put the agri-food sector at the second place as the most productive sector after tourism in Italy.

2.1 Brief introduction to the legislative decree in the matter of national agri-food districts.

Industrial districts have been one of the main factors for the Italian success since the Seventies. The structural changes brought by globalisation influenced the structure of the small and medium firms especially their internationalisation strategies adopted due to the the consequent appearing of new markets and the opening of the production chains.

The attention of the economists started to be addressed to those agri-food districts at the end of the Nineties since it was emerged the fact that globalisation has not weakened the importance of the territory inside these economic and productive structure.

The legislative decree n. 228/2001 *"Orientamento e modernizzazione del settore agricolo"* has testified the governmental interest in recognising those territories characterised by a typical production that should be protected by a Consortium.

> Si definiscono distretti agroalimentari di qualità i sistemi produttivi locali, anche a carattere interregionale, caratterizzati da significativa presenza economica e da interrelazione e interdipendenza produttiva delle imprese agricole e agroalimentari, nonchè da una o più produzioni certificate e tutelate ai sensi della vigente normativa comunitaria o nazionale, oppure da produzioni tradizionali o tipiche. (art. 13.2 law n. 228/2001)[13]

Even in the current situation, agri-food districts are recording high level of exports and employment in respect to other sectors. According to the IV Report of Distretti Italiani, only the agri-food sector recorded an increase of +9,4% in the sales volume of 2011 in respect of the level pre-crisis. Through the quality and the

13 The full legislation is available at: http://www.camera.it/parlam/leggi/deleghe/01228dl.htm

typical characterisation of their production, these districts are able to better contrast the economic crisis also thanks to the great appreciation of the Made in Italy in the foreign markets.

Each actors composing the productive system are interested in promoting the image of the product worldwide and the identification of the territory where it is produced, confirming the legacy with the local roots.

Among the agri-food districts that have operated following the recommendation of the governmental law, there is the Conegliano Valdobbiadene Prosecco Superiore, one of the main components of the wine sector of Veneto region.

2.2 Wine sector in Veneto region

Veneto region has a millenarian history regarding the transformation of the territory, and the population has understood how to take advantage of the nature and establish a very close relationship with it (Soletti, 2004).

The vineyard is a constant element in the Venetian landscape, which is considered to be an area of wines from record. In fact, since ancient times wine has been produced in all provinces of the region, and through the Serenissima and its strategic position, the trade with other countries was permitted.

Verona and Treviso are recognised to be the most relevant provinces in the wine production and every year they are contending for the primacy. (Accademia Italiana della Vite e del Vino, 1988).

The first centers of wine sparkling oenology were located in Piedmond, land of the famous *Moscato di Canelli* wine, and in Veneto where *Conegliano Valdobbiadene Prosecco* excels. Moreover, it is important to note that the industry of the sparkling wine had its origins in Italy during the second half of the nineteenth century in Piedmond and Veneto simultaneously.

Venetian viticulture had its origin around 1400, a period of splendour with several exports to German countries started until a decadence at the beginning of the Eightieth century.

The strong desire to recover the ancient splendour of the production clashed with problems related to the fall of the republic of Venice. Veneto was a region with a huge presence of vines but only after the liberation from the Austrian occupation in 1866, a movement of renewal arouse, and from Conegliano it spread throughout Italy (Accademia Italiana della Vite e del Vino, 1988).

From that moment on, *Prosecco* has started to be considered the emblem of the region and it contains within itself a long tradition and culture rooted in the territory and in the population's common knowledge.

The strength of the Venetian wines and its multitude different forms are extremely important because made possible the diversification of the offer and the response to specific demands made by customers (Cantina Sociale di Ormelle, 2009).

In the *Regione del Veneto* website is outlined the fact that the wine sector in the region excels especially in the wines DOC with more than 20% of the national total. The secular experience together with the florid characteristics of the soil and the territory, make possible to place Veneto among the first positions in national DOC wines production (Soletti, 2004).

The result can be ascribed to the several initiatives to support the betterment of productions DOCG, DOC and IGT.

These initiatives aimed at supporting the quality productions, have been actuated through investments regarding the entire production chain, from the firms to the wine cellars and from specialised institution for the technical assistance to the promotion agencies.

Veneto Agricoltura website reports an interesting and recent article, *Il Veneto sorride alla crisi* (January 2013), regarding the situation of Venetian wine sector.[14]

Veneto Agricoltura, the Region and Avepa (Venetian Agency for the payment in the agricultural sector) processed the data of 2012 and discovered that wine in Veneto is successfully coping with the international crisis.

14 *Veneto Agricoltura* forms part of the Veneto Region structure with the goal of promoting and implementing the interventions for the modernisation of agricultural structures and the protection of the territory For further information, please see *Veneto Agricoltura* website: http://www.venetoagricoltura.org/

In fact, data regarding the Venetian wine export confirms its first place in the national classification and the exports have also increased during 2012.

The positive results are the evidences of a strong commitment, strategies and innovations of all the firms, agencies and institutions that are working for improving the situation of the sector.

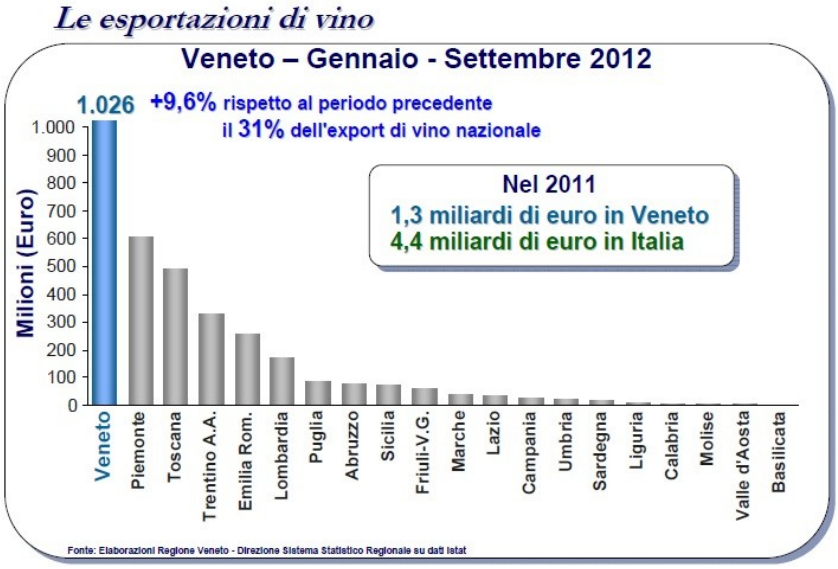

Fig. 2 Venetian wine export. Maria Teresa Coronella of Regione del Veneto (2013) Le esportazioni di vino. Slide 20.

In 2012 it is estimated that the wine sector is composed of more than 77.000 hectares of vineyard, almost 40.000 producers, 10.800.000 quintals of grapes, 9.257.000 hectolitres of wine and almost 1,4 billion euros in exportations. The reported data are fundamental to actually understand how important and well under-way is the wine sector in the region, especially if compared with other regions as in the graph above.

The article reported in Veneto Agricoltura website sums up the third event which is part of *Trittico vitivinicolo veneto 2012,* an initiative promoted to follow the phases of the grape harvest from the starting point until the final production. Wine producers and the regional structures have the possibilities of collaborating in order to better face any possible future challenge through the analysis of the

situation of the sector.

The provinces that have the primacy regarding the grape harvest were Treviso, with its 4,59 million of grape harvesting, and Verona with 3,78 million.

Among the ten Venetian designations of origins, the sparkling wine called *Prosecco* and its *Glera*[15] is at the top ten of the classification.

Among all the wines produced, *Conegliano-Valdobbiadene Prosecco DOCG* is one of the most famous and appreciated as it is confirmed by the success in the foreign markets. The success is connected to the efforts done by each actors composing the industrial district, together with the richness of the land where it is cultivated.

2.3 The origin of Prosecco production and the delineation of the territory where it is produced.

This sparkling wine has its origin among the hills of Conegliano and Valdobbiadene. The grape cultivation and the wine production dates back to the pre-Roman period, with the Atestina civilisation.[16]

The area is characterised by its interest in the wine culture especially regarding the field of the sparkling wine.

A fundamental role is attributed to the *Accademia Agraria degli Aspiranti* which was founded in 1769 in Conegliano, a city that is still nowadays the core of knowledge and training of the production.

The first Italian wine school was established in Conegliano in 1876 and with it the success of Prosecco started. All the best prepared international professors came to teach in that school and contributed to the technical progress of the modern wine science and oenology. (Rorato, 2002).

The wine grovers were able to improve the quality of the hillside vineyards, where

15 Glera is a white grape variety and it is a basic component for the production of prosecco.

16 Atestina civilisation is a civilisation located near Este, a city in Veneto region, during the Iron Age. Treccani http://www.treccani.it/enciclopedia/civilta-atestina_(Enciclopedia-dell'-Arte-Antica)/

sometimes the cultivation could be difficult because of the slopes, and the operations are performed by hands.

Furthermore, the use of the Glera and other local vineyards for the production of Conegliano Valdobbiadene Prosecco has allowed an improvement in the sensory and aromatic characteristics of the wine.

Thanks to the intuition of Antonio Carpené (1838-1902), the wine was transformed into a sparkling wine through another fermentation in large containers. This process was later refined by his nephew, who introduced the method of the second-fermentation in autoclave for obtaining the sparkling characteristic in aromatic wine such as the Prosecco.

After the first world war, there was a need of creating an institution aimed at helping the winemakers in the area, and for this reason in 1927 was founded the *Stazione Sperimentale di Viticoltura ed Enologia* in Conegliano.

Afterwards, in 1945 the *Confraternita dei Cavalieri del Prosecco* was established, even if the major step forward regarding the defence and promotion of the product was done almost ten years later.

In fact, in 1962 was founded the *Consorzio di Tutela* (Consortium for the Protection) which has brought the creation of different brands. The importance is related to the institutionalisation of the characteristics of the product and consequently, its fame as a sparkling Italian wine that contained all the quality and culture globally attributed to the *made in Italy*. (Centro Studi di Distretto, 2012).

In 1966, a white wine road was inaugurated inspired by the Deutsche Weinstrasse in the valley of the Rhine. The road follows a route that links the city of Conegliano to Valdobbiadene and it is characterised by an amazing landscape, a cultural path surrounded by wine cellars and typical Italian inns.

The importance of Prosecco growth until 1968, when was obtained the certification DOC and its fame has started to take off.

Recently, after 40 years from its institution, it has obtained the DOCG recognition, precisely in 2009. This goal has permitted to place Conegliano Valdobbiadene Prosecco Superiore among the national wine characterised by an extraordinary

quality. The disciplinary for the production of Prosecco DOCG is divided into eight articles, which give the definition and the requirements for the production of the wine, from the denomination and the different types of wine to the labelling and packaging. The approval of the disciplinary made by the National Wine Committee was important for the protection of Prosecco from possible imitation, and at the same time it made clear the distinction from other wines of the region.

The work of the Consortium has been found to be extremely relevant in promoting the wine via several events, cultural and training activities that underline the strict contact between the economic and cultural features of the production. Prosecco represents not only an important economic tool for the region but it is also an emblem of culture and history. People usually recognise themselves in the typical products of their region/country, since they are considered part of the history and common knowledge.

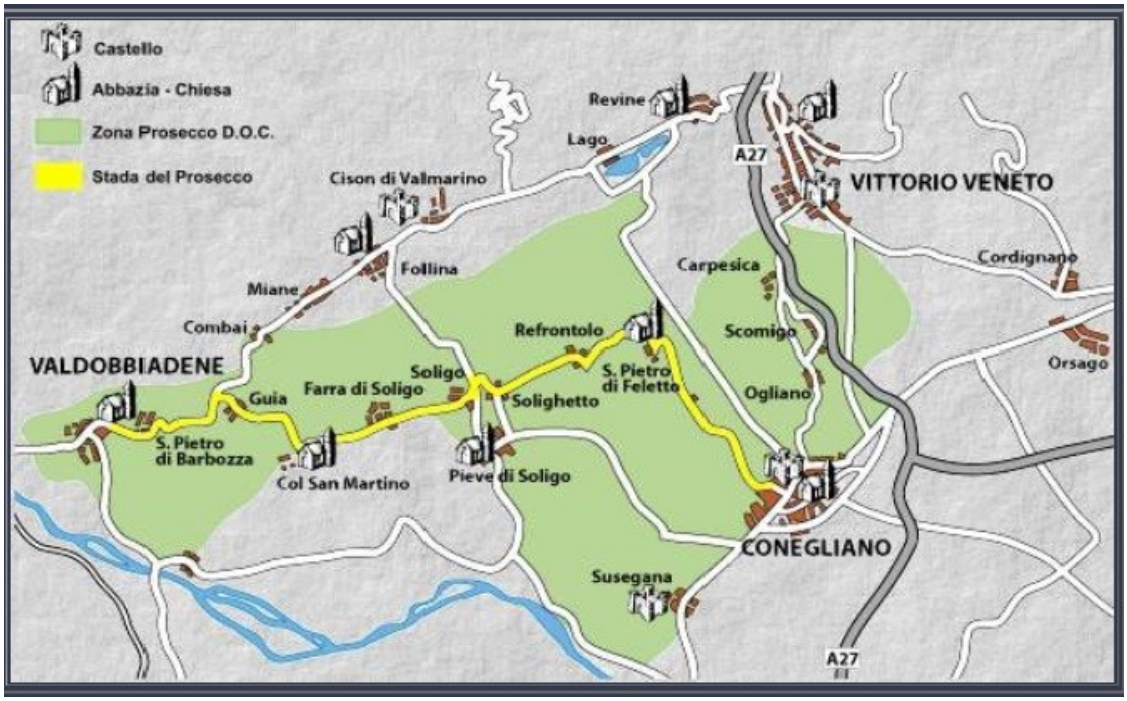

Fig. 3 Figure showing the DOCG area. Image taken from the website: conegliano2000.it

The hills where Prosecco is cultivated and produced are located among the city of

Conegliano and Valdobbiadene, 50 kilometres far from Venice and at the same time quite close to the Dolomites.
The two cities represent the core of the ancient knowledge and of the local culture regarding the sparkling wine.
Conegliano is where knowledge and high education training are contained, instead Valdobbiadene is the place where Prosecco is carefully produced.
The territory with its evocative hills are so interesting and distinctive that have offered the possibility of becoming one of the World Heritage Site. (Ferraris, 2012).
The landscape is so characteristic that was possible to include it into the Tentative List of the UNESCO World Heritage Site in 2010.
The project started in 2008, when the Consortium submitted the application to UNESCO because the hills where the vineyards are located, perfectly fall into the second category of the World Heritage Convention of 1972. The category is the one of organically evolved landscape, in fact they are the result of a combined activity made by both men and nature.
The application was done because it is an effective mean to enhance the area and the inestimable value of the territory and to make it even more globally visible.
Three are the elements that actually respond to the requirements to enter in the UNESCO list (prosecco.it website):

- the presence of a civilisation and material culture connected to the cultivation of the vine;
- the strong interaction between man and environment that creates the conditions for the preservation of the natural system;
- the connection between the natural hills and the works of famous artists such as Bellini and Cima da Conegliano.[17]

Thanks to the strong link that connects the region to the institutions and the

17 Information taken from Prosecco website: http://www.prosecco.it/docs/unesco_it.pdf

growers, in 2010 was possible to officially include the area in the tentative list of the UNESCO.

Fig. 4 Picture showing the landscape taken from Rapporto di Distretto 2012 p. 20

Having reached this important goal is meaningful not only for economic aspects or international fame, but also for assuring the protection and preservation of the territory especially for the future generation. It is absolutely fundamental to protect the excellence, quality and image and fighting against possible imitation of the product since through it, the territory gains visibility worldwide.

2.4 Prosecco wine and its varieties.

The cataloguing effectuated at the beginning of the twentieth century, show different types of *Prosecco* which differ from each others for the form of the berries (Rorato, 2002).

The varieties mostly present in the territory are the *Prosecco tondo, bianco* or *Balbi* which is characterised by its spheric berry, and the *Prosecco lungo* so called for its long berry.

Several clonal selections have been effectuated by the Experimental Institute for the viticulture in Conegliano in order to contain the production and improve the characteristics of the wine.
Through the disciplinary edited for the DOCG Prosecco, it is listed the correct denominations for the varieties.
In fact, *Conegliano Valdobbiadene Prosecco* DOCG presents itself in the following types:

- Still Prosecco which is the less famous version but the closest to tradition. It has a light straw colour and has a fine flavour;
- Semi-Sparkling Prosecco is instead the variety produced in the autoclave and for this reason it has a lively and youthful flavour;
- Sparkling Prosecco is the most famous typology that made possible to achieve a global fame and reach the level of the French champagne.

The Sparkling version is the most famous especially worldwide and it is produced in the Brut, Extra Dry and Dry version according to the residual sugar contained in the wine. Prosecco, in all its typologies, represents the culture of the territory and it has drawn the profile, the taste and the life of the zone where it is produced. The exact area of production and the type of vine requested are delineated and specified in the disciplinary together with norms related to the wine-making in respect of the traditional characteristics of the wine, labelling and packaging.
Besides DOCG production, there are also other denominations in the area which differ from each others for the territorial area where they are produced.
From 2009 the production of Prosecco is divided into two new classifications: Doc and Docg. In 1968 the denomination Doc was assigned to the current Prosecco Docg, produced in the hilly area between Conegliano and Valdobbiadene. When it gained the Docg denomination, the previous Prosecco Igt was recognised as a Doc.

Fig. 5 Distiction of the different denominations. Taken from Adami Spumanti website: http://www.adamispumanti.it/vigneti/

Cartizze Docg and Rive Docg are the *cru* of the denomination. In fact, Cartizze is located in an area of 107 hectares between Saccol, San Pietro di Borbozza and Santo Stefano and the wine produced here is considered the maximum expression of the Conegliano Valdobbiadene Prosecco (Centro Studi di Distretto, 2012).

Rive is instead a classification for indicating the wine produced in the vineyards located in the steepest areas and it usually refers to a specific locality where it is produced (for example Rive di Colbertaldo as in the figure above).

Giving specific definitions and characterisations of the production, has contributed to the enforcement of the team work done by the actors in the district. They are all working for reaching the same purpose, that is the success of the Prosecco not only inside the nation border but especially worldwide, without losing the contact with the territory and the tradition since the competitive advantage of a nation is strictly connected to its specificity.

2.5 The economic actors working inside Conegliano Valdobbiadene Prosecco Superiore district.

As already said, the industrial district of *Conegliano Valdobbiadene Prosecco Superiore* is located in an area in the province of Treviso that includes 15 villages between Conegliano and Valdobbiadene.

The wineries of the Conegliano Valdobbiadene DOCG, the supplier companies, testing laboratories, banking and financial assistance institutions and finally the entities for the promotion of the product are all part of the district and through their collaboration, the complex structure works in synergy. (Centro Studi di Distretto, 2012).

Accordingly, the district is characterised by the presence of small and medium enterprises in a specific area sharing a common knowledge and targets and working for the realisation of the good performance of the entire industrial structure.

The flexibility and the variety of actors that are part of the agglomeration make the structure an effective example of a district, which has not only a strong attachment to the land and tradition but also an interest of becoming a symbol of the Venetian productivity and quality in the world.

The interdependence among the firms that are working in different sector or productive phases, from the raw material to the final product, promotes the flow of knowledge and the continuous search of more effective innovations.

After the emission of the regional law 8/03, the territory where Prosecco is produced was recognised to be the first oenological district and the first sparkling wine district in Italy. In june 2003, the Consortium for protection, producers and other subjects involved in the production of the wine subscribed a common document called Pact.

There was a common will aimed at demonstrating the existence of a territorial system around the denomination and obtaining the recognition in manufacturing district from Veneto Region. Since then, all the actors composing the industrial

district can actively contribute in creating an opportunity for growth and reaching new strategic goals.

All the projects that have been presented during the years, have increased the awareness of feeling and being part of a productive group.

Through the district form, the image of Prosecco was strengthened in Italy and also internationally. In fact from 2006 to 2009, several actions regarding the promotion and the development of the product were done by realising *kermesse* and events worldwide. (Centro Studi di Distretto, 2012).

The development of the Studies Center was essential in order to monitor the work of the firms and defining the strengths but also the weakness of the system. Furthermore, a lot of attention was paid for the actuation of projects that would help the realisation of the product and its sustainability such as the studies made by the University of Padua regarding water saving. (Centro Studi di Distretto, 2012).

Another interesting step forward was done in the context of approaching the customers via internet. In fact, software for the administration of the clients was introduced in the firms together with the renovation of website and implementation of blogs, wine-communities etc.

The organisation and participation in international events, was essential to continue the activities of promotion not only in the Italian but also in the foreign market.

In all the initiatives, the district has been presented under the name of Conegliano Valdobbiadene Prosecco district, exalting not only the product but also the territory stressing again the importance of having local roots. (Centro Studi di Distretto, 2012).

One of the most interesting event is Vino in Villa Italia, that was organised for strengthening the link between the wine and the territory and helping Italian and foreign people better understand the reality surrounded the product.

According to the huge success that was recorded by the event, it was decided to create a similar event also abroad, in New York, San Francisco and London. It is a

huge opportunity for firms to give to the customers all the necessary instruments for knowing the product, its characteristics and history. (Centro Studi di Distretto, 2012).

Situazione generale	
Nascita della Denominazione di Origine	1969
Riconoscimento della Docg	2009
Comuni compresi nella Docg	15
Superficie dei vigneti che hanno prodotto uve DOCG nel 2011	5.647 Ha
Superficie del "Superiore di Cartizze" 107	107 Ha
Addetti del settore nell'area Docg:	
- n. Viticoltori	3.068
- n. Vinificatori	437
- n. Enologi	250
- n. Addetti settore enologico	1.500
- Case spumantistiche	168
Caratteristiche dell'annata:	
Bottiglie totali prodotte	68.686.000
Bottiglie di spumante prodotte	62.648.000
Bottiglie di spumante "Superiore di Cartizze"	1.445.000
Bottiglie di spumante Rive DOCG	1.126.109
Bottiglie totali della tipologia Spumante "Superiore"	61.203.000
Percentuale dello spumante sul totale delle bottiglie prodotte	91.2%
Bottiglie di frizzante prodotte	5.811.000
Bottiglie di tranquillo prodotte	227.000
Bottiglie totali esportate	40.8%
Spumante 'Superiore' esportato sul totale delle bottiglie vendute	41.9%

Frizzante esportato sul totale delle bottiglie vendute	38.1%
Superiore di Cartizze esportato sul totale delle bottiglie vendute	3.3%
Rive DOCG esportato sul totale delle bottiglie vendute	14.5%
Valore del prodotto al consumo	Euro 420.000.000

Fig. 6 General data regarding the situation of Prosecco DOCG. Source: Centro Studi di Distretto (2012) Rapporto di Distretto p. 25.

The table above is interesting for having a general idea of the industrial district structure and its relevance in the territory.

In an interview reported by OKKUPATI, a television program reproduced by Rai 3 channel, Giancarlo Vettorello, the director of the Prosecco Superiore Consortium, stated that there are several professional figures operating inside the productive chain, from the oenologist, which has a pivotal role in the realisation of the production, to the executives whose role is to guide the sales, from people in the wineries to the others working in the vineyards.

The district is opened for all people who want to work and use passion in what they do; Paolo Bisol, the owner of the winery Ruggeri, affirms in the interview for OKKUPATI program that when it is time of grape harvesting, several pensioners, unemployeds and students can contribute in this activity. It is interesting to see the benefits brought by the district also regarding the employment rate, that is a current problem nowadays.

Moreover, it can be said that the district has not undergone a profound crisis. In fact, in 2009 it was recorded an increase of 6% in bottle production and no high rate of unemployment was noted. (Ferraris, 2012). It is a well-working structure and the reason is linked with its strong net connecting the actors of the district, all sharing an attention to the aware know-how, essential tool for returning energy to the economy.

The long preserved tradition has been maintained through the hard work of

several institutions such as the Oenologic school, the Experimental Institution of Viticulture, the Consortium for the Protection and many others that are now presented starting with the agents that are mostly inside the production chain, the wineries.

Wineries

Wineries are fundamental actors since inside these firms Prosecco is produced following the old tradition that glues the territory and its inhabitants.
In the province of Treviso, more precisely in the fifteen municipalities that are composing the DOCG area, are located several wineries of different dimensions, from the smaller firms to the largest ones. According to the Report 2013 of the Studies Center, the wineries in the DOCG areas are 168 and they are mostly a family-run business so the employees are around the number of 20.
The essential figures that cannot be omitted are first of all the oenologist, which is usually one per firm, and then the export office employees. In recent years, firms are working for reinforcing the export office as signals of an increasing internationalisation trend.
For better understand the structure of the industrial district and the economic actors present in it, it was decided to interview five of the most famous wineries for having a picture on the real situation in order to compare it to what can be found in the annual reports of the Studies Center or in other books consulted during the researches.
The wineries that gave their contribution are: Adami, Bepin de Eto, Col Vetoraz, Ruggeri and Val d'Oca, all of them are located inside the DOCG area as it is shown by the map below.

Fig. 8 Own realisation from Google maps showing the location of the interviewed wineries.

Adami srl (point C in the map above) is one of the oldest winery in the territory, its origin dates back to 1920 when the vineyard called *Gardino* was bought but the legal constitution is in 1955. Its location is in Colbertaldo di Vidor, one of the 15 municipalities of the DOCG area.

The number of bottles produced in 2012 is 770.000 and the percentage covered by Prosecco DOCG is 53,4%. Even if at the moment of the interview has not ended yet, the year 2013 records a growth in sales volumes of + 6%.

Bepin de Eto sas (point A) is located in San Pietro di Feletto and was constituted in 1965 by the Ceschin family. The number of bottles produced in 2012 is 900.000 and 40% of production is covered by Prosecco DOCG. The year 2013 has brought an increase in sales volumes also for this winery but at the moment of the interview was not possible to express it with a percentage.

Col Vetoraz Spumanti srl (point B) is located in San Stefano di Valdobbiadene, close to Adami, and was constituted in 1993 by Francesco Miotto. a descendent of Miotto family that had started to cultivated the land, Paolo De Bortoli and Loris dall'Acqua.

The number of bottles produced in 2012 is definitely more than the other two wineries, in fact it is estimated to be about 1.080.000 and almost all the production is reserved for Prosecco DOCG (95%). It has been recorded a +2% in volumes of sales in 2013 but it is important to stress the fact that increasing the production, means decrease the quality due to the fact that the raw material is difficult to find since it is strictly connect with the weather and the nature. This is something extremely important for the wineries interviewed and all of them are taking it into account since it is a characteristic of their production but at the same time it is a strong limitation.

Ruggeri & C. Valdobbiadene srl (point D) was constituted in 1950 by Giustino Bisol and it is located in Valdobbiadene. Here the production is closer to the one of Col Vetoraz, in fact in 2012 it was produced 1.200.000 bottles under the name of Ruggeri and 1.000.000 with other brands. Prosecco DOCG covers almost all the production of the winery, it is estimated to be about 90%. The year 2013 is thought to follow the trend of the previous years, with a slight increase in sales volumes.

Val D'Oca Cantina Produttori di Valdobbiadene (point E) was founded in 1952 in Valdobbiadene. It is an agricultural cooperative society which gathers together 576 winemakers and 714 hectares of vineyards.

In 2012, 10.200.000 bottles were produced and the volume of 51% was reserved to Prosecco DOCG. In 2013 was observed an increase of the volume of sales about 2%.

According to the Report of the District (2013), the wineries interviewed can be classified as some of the larger firms inside the district due to their bottles production that exceeds 500.001 bottles.

Suppliers providing glass, corks, machines and services in support of the production

Apart from the grape growing, that three firms out of five admit to entrust it to

private cultivators, activities from grape cultivation to the labelling and packaging are almost all effectuated inside the wineries.
Instead for obtaining fundamental materials such as glass, corks, labels and services, all five firms avail themselves of suppliers but only one of them entrusted these activities to companies forming part of the industrial district.
For example, the managing partner of one of the firms interviewed admitted that he went to a graphic studio in London city for having a new label for their bottle of Prosecco done.
The reason of choosing firms outside the district for subsidiary activities can be motivated by a research of something new and characteristic together with the most convenient economic choice.
Glass covers an important role in the wine production of the area, in fact among all the industrial sector, glass is for sure one of the most fundamental because is strictly connected with the realisation of the bottles that became part of the final product and it takes part in the visual presentation of the wine. (Centro Studi di Distretto, 2010)
Even if several Italian industries producing bottles are now referring to multinational companies with their office in Europe but outside Italian country, the production is still very present in the North-east of Italy.
In the province of Treviso, there is an important commercial hub located in *San Polo di Piave-Ormelle* constituted of an industry with almost 200 employees passed under the control of a multinational company almost ten years ago. The daily production is high, in fact it is estimated that the industry has a production capacity of almost 1.800.000 bottles and most of them are reserved for the wine bottling process. (Centro Studi di Distretto, 2005).
The small and medium wine producers are supplied by the retailers of the area, instead the larger have a direct contact with the principal office located in Milan.
Another supplier company is situated in *Fossalta di Portogruaro*, where is present another wine production that is the DOC Lison Pramaggiore.
However, even if the area is famous for another type of wine production, the

company is linked with the Conegliano Valdobbiadene Prosecco and it is one of the first furnishers of glass bottles.
In the province of Treviso, there is the Italian subsidiary of one of the largest multinational company working in the field of corks production. The company has 16 production sites in Portugal and 20 subsidiaries all around the world. The industry located near Treviso covers almost the 20% of the demands represented by Conegliano Valdobbiadene Prosecco. (Centro Studi di Distretto, 2005). The remained percentage is satisfied by other brands established in Trento, Trieste and Verona. The phases that are locally produced are the final processes such as the stamping of the bottle cap, the storage and shipping.
Another important activities is related to the furniture of machines for the wine production, that can be divided into three categories as follows:

- Companies that produce machines that cover several processes, from the grape reception to the sparkling process;
- Companies that build only the containers for the Charmat method for producing sparkling wine;
- Companies that create bottling plants.

In the province of Treviso there are four companies that represent one of the most important industrial center in the world, in fact they are composed of almost 500 employees.
The industrial district can be almost fully supplemented by these four manufacturing companies regarding their need of machines for producing the wine.
There are also several activities inside the industrial district which are in support of the viticulture. The activities are sustained by testing laboratories and graphic studios.
Graphic studios have an important role for the realisation of the packaging due to

the fact that the product has to be represented in a proper and distinctive way. The package has to be unique, impressive and easily recognizable for the customers. So besides the label, there is an accurate search for the best package in order to present the product in the best way.
There are several operators in testing laboratories that are working in contact with the producers of Prosecco and all of them have different level of specialisation. Some of them are specialised in genetic, chemical or biological analysis instead others are specialised in the wine sector.
They result to be fundamental for the realisation of the product because of their effort in analysing its composition and improve its quality.
Even if the interviewed wineries affirmed that for the furniture activities they charged firms outside the district area, located in the province of Treviso, in North-East Italy or inside the nation's borders, they stated that being part of a district is an advantage and they feel part of it especially thanks to the work of the institutions such as the Consortium. Communication among the firms is the result not only of the effort of each wineries but also of the several activities promoted at institutional level. Through the organised activities, it is possible a strong flow of knowledge which Marshall considered extremely important in an agglomeration of enterprises.
During the interviews, the District Studies Center and the Consortium resulted to be the two district bodies that are mostly in direct contact with the wineries.

Consortium for the Protection and other entities working for the betterment of the production.

The Consortium was founded in 1962 by a group of 11 producers who wanted to protect the quality and the image of their product. After seven years, it was officially recognised by the Agriculture Department as a protection body (Rorato, 2002).
The Consortium is a private entity which includes all the categories of producers,

from the vine growers to the winemakers and bottlers.
It is in close contact with research institutes and for this reason it covers an important role regarding technical improvement, assistance and training.
The Consortium is inside every phases of the production since it is focused on ensuring the quality of the Prosecco with the help of Valoritalia, a foundation institutionalised by the Ministry of the Agricultural, Alimentary and Forest policies in 2005 for controlling the quality and traceability of the products.
During the years, the Consortium has expanded its activities focusing the attention on the protection of the quality and originality of the product. (Rorato, 2002). It is the landmark for the national and international image of Prosecco because it is also involved in the organisation of events which contribute to expand the image of the wine nationally and internationally. An important goal was reached in 2003 when the district was recognised as the first Sparkling wine district in Italy. It is an important recognition that was possible only through the involvement of the several entities in the territory (Centro Studi di Distretto, 2013).
At the meantime, in 2003 the District Studies Center was founded as the result of the collaboration between the Consortium and the C.I.R.V.E., an interdepartmental center for viticulture and oenologic research located in the same place of the Cerletti Wine School, which was founded in 1877 and it is now became a technical institute in association with the university of Padua. Many students have became estimated operators in the sectors and are now playing important roles in scientific, cultural, economic and institutional field (Rorato, 2002). In the same location it is present the Center for the Research and Experimentation in Agriculture (CRA-VIT), which offers a support for all the surrounding enterprises forming part of the wine sector.
Its activities are linked with the creation of plans focused on the genetic improvement of the grapevine and the selection of the better variety. Moreover, it studies the best way of cultivation, the technique and the methods more efficient to defend the plantation. (CRA-VIT website).
The Studies Center instead, intends to study the market in order to delineate and

then offer to the firms useful tools for making more effective their strategies. In fact, every year it offers a report in which it is delineated the situation of the district, also regarding the international trade in order to plan strategic actions for the following years.

The activities regarding the promotion and protection of the product are in turn entrusted to Altamarca association.

It proposes actions aimed at ensuring the evolution and economic development of the typical products and the tourism connected.

The work is based on the evaluation of the Altamarca wines, its gastronomy, culture, territory and landscape.

The area that is promoted is the one collocated in the hilly territory in the province of Treviso as shown in the figure below.

Fig. 9 Altamarca area. Image taken from Altamarca website www.altamarca.it

The area contains 44 municipalities, 18.100 structures from hotels to agricultural productions and 600.000 tourist visits per year. (Altamarca website). The data confirm the appeal of the area for its typical products and its culture.

The programme of the organisation is focused on the development of the area through tour, nature trails and sporting events that can attract tourists. In order to provide to the visitors a proper welcome, the organisation is working for attracting

investments and structures.

It also actualises cultural events nationally and internationally for strengthening the link with other territories interested in the promotion of their productions and for making the Altamarca more globally visible.

Finally, it is also a territorial marketing organisation due to its interest in communication projects and its collaboration with the bodies of the Province and of the Region for reaching a common development of the territory.

The security of the production is also entrusted to another body that form part of the industrial district, that is the Brotherhood of Prosecco.

After the Second World War, a group of eno-technicians that had studied in the Wine school of Conegliano, decided to form an association in order to fix the status of the vineyards in the area around Valdobbiadene.

The scarce image of the Prosecco at that time and the fear of a possible exodus of the farmers towards more remunerative sectors were incentives for the creation of the association in august 1945. (Rorato, 2002).

It was composed of not only wine producers but also scholars and local owners, all sharing a passion for Prosecco and the preservation of this noble tradition in the territory. (Confraternita di Valdobbiadene website).

From 1974 this legacy has been represented by a bottle, every years chosen among all the productions of the members of the brotherhood. Only 5000 bottles are put on the market.

The aim of their initiative is to exalt the properties of the wine and to propose to the customers an ideal model of the perfect Prosecco.

The Brotherhood meets in a suggestive place that is an ancient underground wine cellar placed in *San Pietro di Barbozza,* a small city near Valdobbiadene. (Rorato, 2002).

This place is the ground for celebrating the investitures of new members, debating on wine theme, tasting and selecting the wine of the year that will represent the Brotherhood.

This institution is considered an University of Prosecco due to its effort in

searching and preserving the perfect product.
Their strong connection with tradition and history is shown by their habit of dressing the official clothes of the Brotherhood, a dark red cloak with golden collar and a blue hat.
This is an example of how much important is the culture resided under the wine production; it characterises the territory, its history and the inhabitants that recognise themselves in it. As Becattini (1989) affirmed, the district is composed of a community of persons, all sharing a quite homogeneous system of values which characterise the *homo distrectualis* (Sacco & Pedrini, 2003). The work of the wineries and the institutions of the area, which help the development of the district with their action of governance, has created a well working productive chain whose success goes beyond the national borders.

2.6 The global success of Prosecco under different points of view: international trade, Wine road and promotional events and cases of imitations and falsifications.

International trade, reference markets and firms' modes of entry into them.

Regarding the foreign trade, the wineries interviewed can be divided into two group: the first one is represented by the firms which have an higher percentage of national sales (from 60 to 73%) instead the second group report the opposed phenomenon, so the exportations has an higher share on the total turnover in the years 2012-2013.
According to the analysis made by the Studies Center (2013), Italy confirms its position as the first area of selling Prosecco DOCG by absorbing a volume of 34,4 million of bottles. Even if in the last decade the domestic market has recorded an increase of sales about +56,4%, the trend is lower if compared to the foreign market.
From 2008 to 2012 it is possible to say that wine firms have a stable presence on

the national market and the larger firms have also increased their visibility in the foreign markets. (Centro Studi di Distretto, 2012).
It is interesting to note that in the short period from 2010 to 2011 a change was recorded in the market preference, as reported in the graphic below.

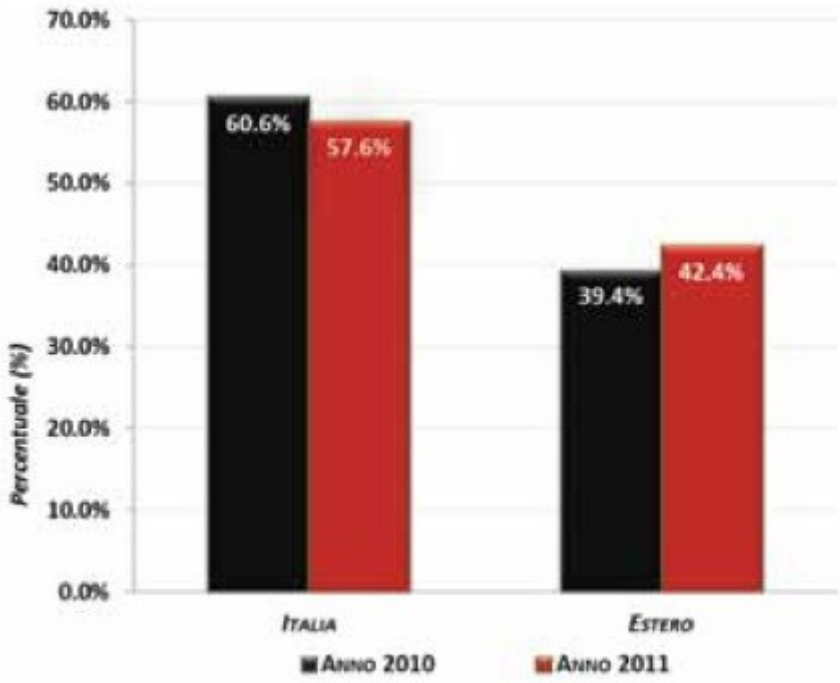

Fig. 10 Repartition of the market share District Studies Center (2012) Annual Report p. 46

In fact, Italian sales of Prosecco have clearly diminished and on the contrary, foreign sales have increased of a + 3%. This trend was maintained also in the biennium 2012-2013 as revealed during the interviews with some wineries.
In fact, all the interviewed firms reported the feeling that the Italian market is in a period of stasis if it is compared with the foreign demands. Especially after the beginning of the crisis, in 2008, several wineries decided to point to the foreign market which reflects a constant growth during the years and it is particularly interested in the Sparkling version of the Prosecco, which is generally the most consumed compared to the other two version, the semi-sparkling and still

Prosecco.

The graph below gives an idea of the percentage of the Sparkling version on the total production in a long period, stressing the fact that this version has been confirmed the most appreciate and then produced.

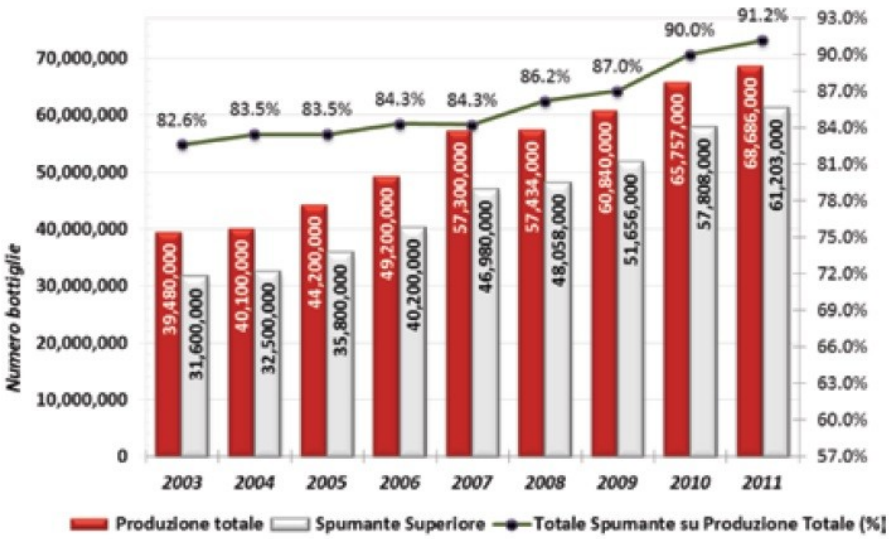

Fig. 11 Conegliano Valdobbiadene Prosecco DOCG: bottle production and extent covered by Sparkling version production. District Studies Center (2012) Annual Report p. 50

In Italy, the sales directed to the North East has increased by reaching 15,1 millions of bottles, this aspect consolidates the role of the area as the engine of Italy.

An increase of +25,8% compared to 2003 for the North West instead the South and Central Italy have confirmed to be the most problematic area with a recorded decrease especially in the last two years. (Centro Studi di Distretto, 2013).

If the distribution channels in the domestic market are considered, it can be said that Mass Retail is the favourite modality of distribution, in fact it has recorded a + 0,8% in 2011 and the trend is confirmed also in 2012.

Ho.Re.Ca channel has decreased in favour of other way of distributions such as

wholesalers, wine shops and home deliveries which have noted respectively an increase of 2% and 0,6% on an annual basis.

The figure below sums up the change in the biennium 2010-2011.

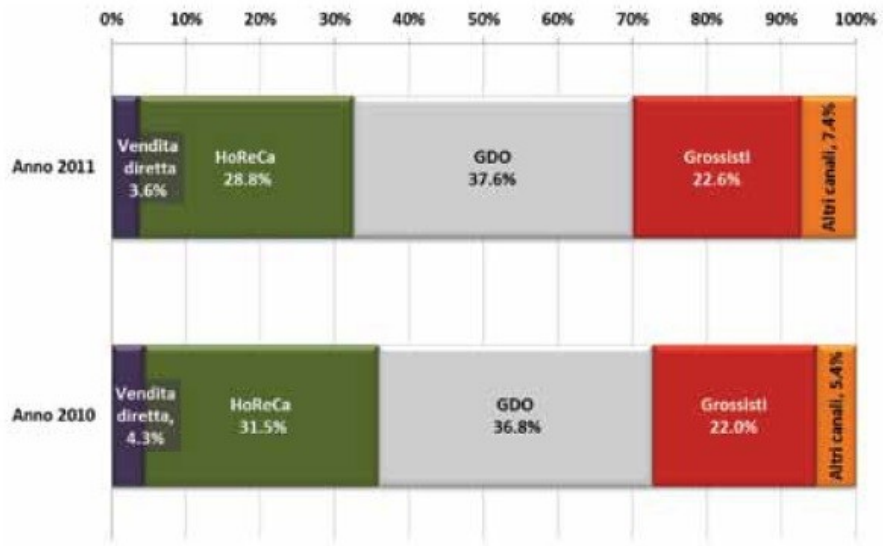

Fig. 12 Market shares of Sparkling Prosecco divided by channels of distribution in years 2010-2011 in Italy. District Studies Center (2012) Annual Report p. 48.

If a longer period of time is taken into consideration, for example the period from 2003 to 2011, the increasing trend is confirmed. The production passed from a 31,3 millions of bottles produced in 2003 to a 61,2 millions in 2011 with an average annual rate of growth which is about 11,7%. (Centro Studi di Distretto, 2012).

There is an increase in export numbers of 12% in respect of 2003 and the analysis of a longer period confirms the Italian preference for the Mass Retail channel as a way of distribution, on the contrary Ho.Re.Ca is affected by a contraction and wholesalers have recorded an increase.

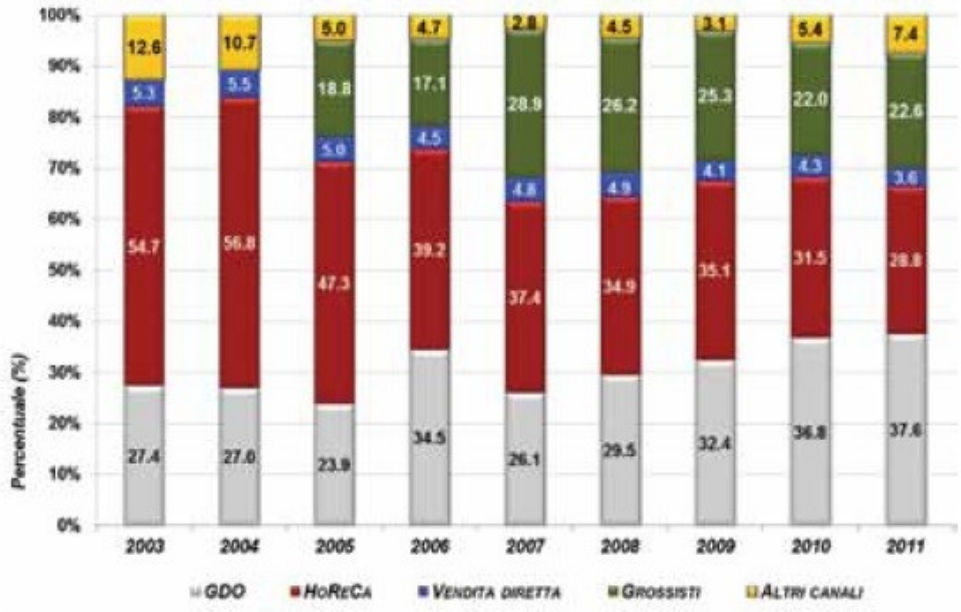

Fig. 13 Evolution of market shares of Sparkling Prosecco divided by channels of distribution in years 2003-2011 in Italy. District Studies Center (2012) Annual Report p. 60.

The appealing of the area linked to the development of the wine tourism has brought to an increase of direct sales, which in turn enforce the connection with the final consumers.

Besides the national market, the foreign markets have started to become important fonts of earnings due to the internationally strong demand of Prosecco.

The wineries interviewed export their product in more than 30 countries worldwide and when it was requested to list the first three countries in order of importance, almost all of them included UK, Germany and USA.

It is interesting to note that there is a relevantly increasing number of exportation directed to the European market, the Studies Center has recorded an increase of + 8,4% annually and European exportations represent a huge percentage from the total (83,3%) as reported below.

CONTINENTI	RAPPORTO DI QUOTA % 2011	VAR. % 2011 SU 2010
Europa	83.3%	+8.4%
America	13.5%	-7.8%
Asia ed Africa	2.1%	-0.9%
Oceania	1.1%	+0.3%

Fig. 14 Sparkling Prosecco and bottle percentage variation in 2010-2011. District Studies Center (2012) Annual Report p. 60.

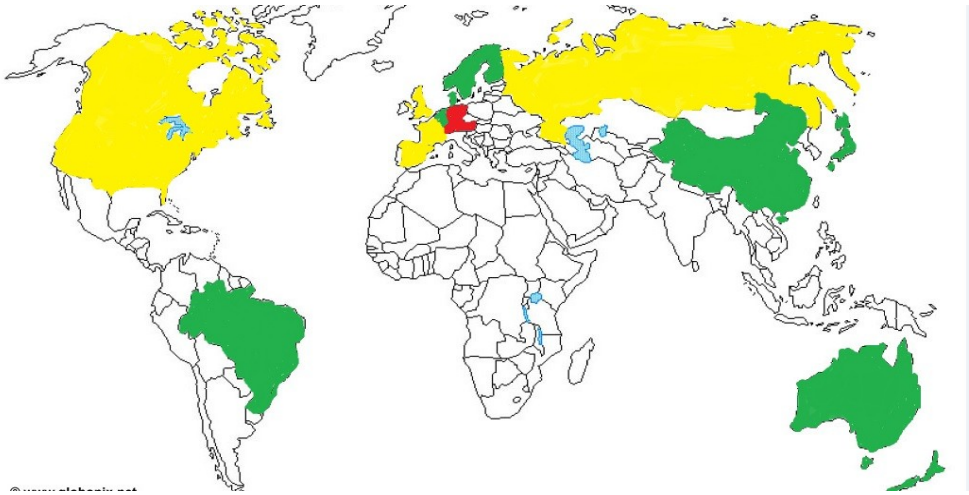

Fig. 15 Own representation for outlining some of the different markets of Sparkling Prosecco DOCG.

According to the Studies Center (2013), the foreign markets of Prosecco DOCG in its Sparkling version can be divided into three groups:

- Traditional markets (highlighted with the red colour in the map above) are composed of the countries that have been showing an enduring interest in the wine during the years. The nations are Germany, Switzerland and Austria.
- Strategic markets (yellow colour) are those countries which have became

economically relevant for the firms of the Conegliano Valdobbiadene area due to the recent high level of exportations towards them. UK, USA, Canada and Russia are important components of the group.

- New markets (green colour) are represented by those countries that have recently made their appearance in the scenario reporting an interesting growth rate such as Brazil, Oceania, China and Japan thanks also to the initiatives and events promoted by the district institutions with the aim of increasing the knowledge of the product.

In the European context, Germany is the first country for exportation rate with 32,3% of the total volume in 2011 and, in 2012 it was recorded a slight increase of +0,6%, and it is estimated about 6,9 million of bottles sold and 31,5 euros in sales volume.

Germany together with UK is the reference market for Sparkling Prosecco DOCG exportations. The average price recorded in the German market is 4,57 euro per bottle, +4,1% in comparison with the previous year. The Swiss market occupies the second position, with an increase of 2,4% compared to the previous year. (Centro Studi di Distretto, 2013).

In 2012, Switzerland confirmed to be the second foreign market as it reached the number of 5,9 million of bottles sold. The growth was not only related to the quantity but also to the average price which reached 4,81 euros per bottle.

According to the Studies Center, Austria is the fifth reference market with a sales volume of 7,8 million euros recorded in 2012, but among the nations that are traditional consumers, the Austrian market represents the one with the higher growth rate in the long run (+37,2% compared to 2003).

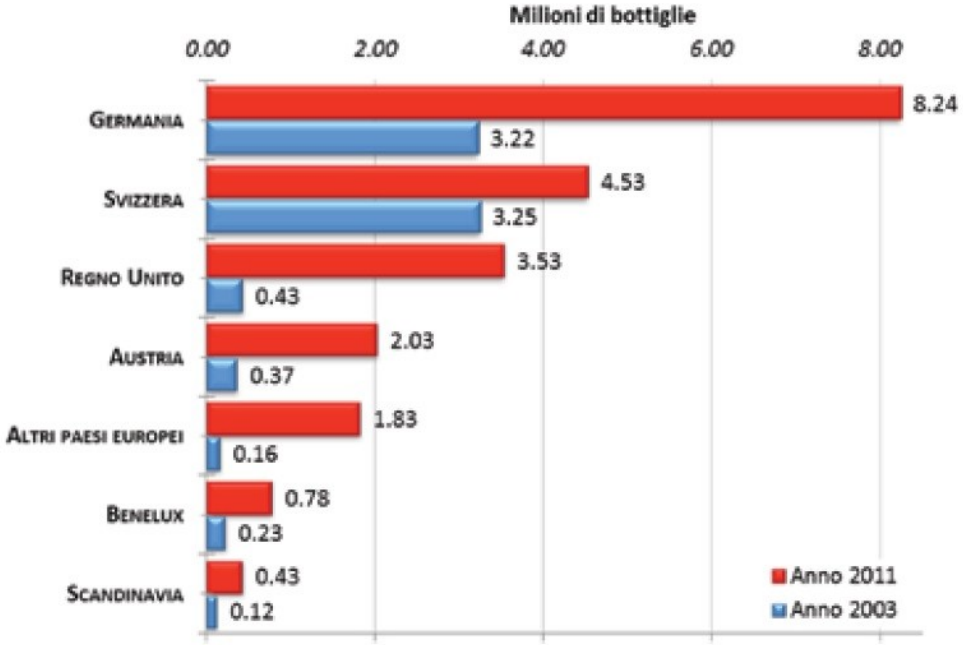

Fig. 16 Evolution of the Sparkling Prosecco DOCG exports per bottle (0,75 l) from 2003 to 2011. Centro Studi di Distretto (2012) Rapporto Annuale. P. 70.

As it is possible to note in the graph above, there is a relevant increase regarding the exportations to UK, which is really appreciating the product.

In the period from 2008 to 2012 UK recorded a profit of 3,84 million of sold bottles and in 2012 the average price was about 4,23 euros per bottle, a +6% growth on annual basis as proof of the British interest in the product.

In 2012 Belgium and Holland represented 3,9% and 3,5% of the global wine import, and from the year 2008 Benelux has been increasing the consumption. In the long run, it has recorded a sales growth of 36,4% annual percentage rate as it can be clearly seen in the graph above.

Scandinavia instead recorded the maximum sales volume in 2010 with more than 600.000 bottles, and then this market recorded a decrease of about -36,8% in volume.

Other European countries have been identified by an high developing tax regarding the export numbers of Sparkling Prosecco DOCG with an annual growth rate of 136% annually. (Centro Sudi di Distretto, 2013).

In the last years, the market of Prosecco DOCG has been recorded a phenomenon of internationalisation of consumptions and Third countries especially the extra-EU have contributed to the increase of the sales.
In the long run (2003-2011) the North-American market has noted a strong exportation growth, especially the USA which has increased the volume of exports about 180,8% instead Canada has a growth of 94,1%. (Centro Studi di Distretto, 2012). In 2012, USA market absorbed a share of 2,4 millions euros of bottles and about 11,2 million euros in value. Almost at the level of Switzerland, USA is the area with highest prices level with 4,81 euros per bottle. However, among the strategic markets, the Canadian recorded the highest level of volume growth in the short period (+77,9% compared to 2011). At the same time, Russia has been distinguished as the best performance in value regarding the exports in the period 2011-2012. (Centro Studi di Distretto, 2012).
However, the most elevated potential of export rate is associated to the new advanced economies, especially BRICs countries such as China and India which are representing 38,4% of the sales absorbed by Asiatic and African region in 2011. Instead Brazil is the country which has recorded the major market rate among the Latin-American region. Even if it is still at a first development stage, it recorded an annual growth of +4,1%.
It can be said that in the long run, it is possible to note a general increase in the exportation of Prosecco in the extra-EU countries apart from Japan that has recorded a contraction in these years.

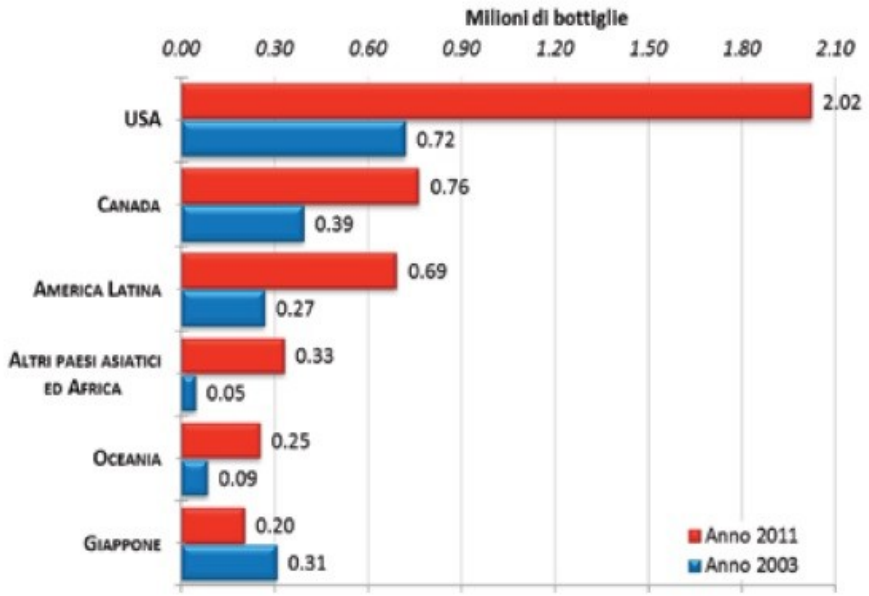

Fig. 17 Evolution of the Sparkling Prosecco DOCG exports per bottle (0,75 l) from 2003 to 2011. Centro Studi di Distretto (2012) Rapporto Annuale. P. 75.

Due to the fact that the export has a relevant role for the denomination, in the Report of the District made in 2012, a section was dedicated to the analysis of the competitive positioning of the firms in the Prosecco Superiore DOCG market. It is extremely important in order to improve and modify the strategies for gaining the best advantage possible.

In the short run, considering the years 2010-2011, the volume exported and the medium price are confirming the growing appreciation for the product in the international market.

UK is the first country for volume of product exported and value, the second place is reserved for sales that are expanding in Oceania and Latin America. The attractiveness of the product in developing countries is confirmed by the prices trend , +14,8% in China and India, and +19,8% in Oceania in comparison with 2010.

From an analysis in the long run, that is from 2003 to 2011, the way in which enterprises have operated in the foreign market can be sum up into four groups.

Firstly, the countries with an high level of market growth rate and relative market share. In Germany, UK, Austria and USA, Prosecco is particularly appealing and has an interesting competitive position as denomination. Investments on communication and marketing have been essential for reaching this performance. Secondly, Switzerland is a country with a low rate of market growth but has an high relative market share. It is strongly interesting because it has the power to generate large incomes with relatively small investments. In fact, a bottle of Prosecco in Switzerland is sold for 4,82 euros which is +20,8% compared to UK. In the Swiss market Prosecco wine exercises a strong competitive force. (Centro Studi di Distretto, 2013).

On the contrary, other European countries such as Russia, Scandinavia, Benelux and countries extra-EU such as Brazil,Canada, Oceania are characterised by an high rate of market growth but a low relative market share. The group is composed of countries with high potentialities even if not earned yet. It should be important to develop investment and project aimed at localising the markets that could be meaningful for the growing exportations of Prosecco DOCG.

Lastly, the fourth group is represented by China, India and Japan which have recorded a low level not only in the market share but also in the market growth. They are areas with an high potential in the market point of view and they can have an interesting potential growth, consequently it is recommended to direct more investments and projects towards these areas.

After having analysed the markets in which Prosecco is present, it could be useful to understand the modalities of entry mainly used by the wineries of the district. Firms can entry in a foreign market through different forms, the export channel is the most used manner when the dimension of the firm is relatively small and the production is localised in the region and it is strictly connected to the specificity and tradition of the area, as in the case of Prosecco DOCG.

The firm that decides to operate in foreign markets using the export modality does not have any productive unity in the countries where it operates. (Maiorino, 2006). The export modality, that can be divided into two typologies: direct or indirect.

The first one requires a major involvement of the firms especially regarding the financial terms. In fact, the firm has to autonomously coordinate the sales in the foreign market using a strong entrepreneurship. Compared to indirect export, it makes possible to demonstrate an higher level of flexibility towards the fluctuation of the market and a direct contact to the customers. Instead, indirect export is characterised by the presence of agencies or trading companies between the exporting firms and the final clients. It is the modality that required less participation of the exporting firm since the commercial mediator offers its know-how and its client portfolio (Keller, Kotler, 2007). At the same time there are some disadvantages such as the absence of a direct contact with the market, bringing to light problems related to fully understand the crucial factors in the foreign market. The firms interviewed stated that they have a direct involvement in the exporting process, some of them sell Prosecco DOCG to a local distributor in order to take advantage of its knowledge on the dynamics of the market and on the customers' taste. The export manager as well is another modality highly used even if some firms have underlined the fact that it is more expensive than the previous. The export manager is a figure that represents the firm in a given market, presenting the product to international buyers or local distributor/seller. Through this methodology, the firm obtains several advantages such as the exclusivity of the relation agent-firm or the possibility of controlling the prices and commercialisation conditions.

However, the modality can be overcame by a formation of a foreign branch as reported by one of the firm interviewed, which is also the larger. This is a step forward in the process of internationalisation through the creation of a stable presence in a foreign market in the form of a foreign direct investment (FDI). The investment of the firm interviewed is only commercial so the branches located in other countries are charged only for the monitoring of the orders and their distributions. Naturally, it is a more expensive mode and for this reason it is chosen only by the larger firms among the five interviewed but through this way of internationalisation, the product results to be more competitive and the sales

quota might record a growth.
However, FDI is the best choice for the internationalisation when resources can be separated from the local context and exploit at the international level and when the export activity is subjected to high transnational cost. (Vanolo, 2010)
Instead, the export results to be the favourite modality of entry in a foreign market when it is important to have the production localised in the region, since it is the symbol of the country's specificity.
Some firms stated that they have taken into account another way of entering into foreign markets, that is through consortium which is an association of small and medium enterprises actuated with the aim of sustaining the competition in foreign markets using a base of common services. It is an interesting possibility for a single firm to have the access to a pool of qualified personnel in foreign trade and marketing and the division of costs related to the internationalisation activities. However, the modality has several disadvantages, among all the loss of independence for the single firm regarding the internationalisation process.
Col Vetoraz and Adami Spumanti are forming part of the consortium called *Le Famiglie del Vino*, which gathers together different regional peculiarities in order to reach growth and economic success. The importer is also charged with the organisation of events and exhibitions worldwide, in this case in the USA, for promoting the product.
E-commerce has also started to be chosen by some firms as a new way of trading through the web. Some of the firms interviewed have started this typology of trading, reserving part of their website for showing their products, the prices and the modalities for buying comfortably at home and having a direct contact with the seller.

Fig. 18 Image taken from Val D'Oca website showing the online commerce operated by the winery.

In the case reported above, the orders can be done only from Italy, instead another winery has reserved to the USA the possibility of online shopping.

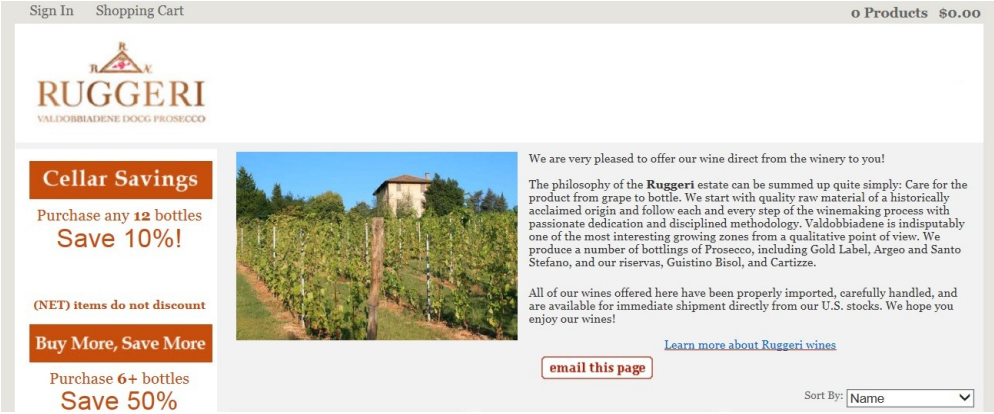

Fig. 19 Image taken from Ruggeri website showing the online commerce.

Through an Usa importer, the winery can sell directly to the consumers' house overseas. After the notification implemented on September 2011 to the EC-USA agreement on trade in wine, Prosecco gained a strong protection in American territory, where all the wines that are wrongly reporting the denomination cannot be admitted or have to be withdrawn from the US market. The original agreement

made in March 2006, had the objectives of improving the cooperation and enhancing the transparency of regulations and to open the road for future broader agreements and continued negotiations. Through the implementation, the commercial trade with Usa has became easier and safer since the protection of the product is guaranteed.

To conclude the part concerning commercialisation of Prosecco, it must be said that the process of internationalisation cannot be formed or decided in a mechanical way, in fact it is the result of several attempts for finding the best and the most convenient way to sell the product worldwide. However, the reasons that drive firms to expands internationally are linked to balance the deficiencies in the domestic market and reduce the dependency on it, as reported by the five firms interviewed since the Italian demands for wine is passing a period of slow growth compared to the vivacity requests of foreign markets. At the same time, internationalisation makes possible to reduce the unit costs of production by taking advantage of the resulting economies of scale.
The analysis of the international trade is fundamental to show how much a productive structure rooted in a territory could reach a global success, even if the growth is not recorded in volume due to the fact that there is a natural limit, it can be measure in value.
The work of wine firms is absolutely fundamental for realising these good performance, together with the others actors composing the district. They are working for continuing this positive trend with a particular attention to the foreign markets, that are at the moment more advantageous than the national.
The positive results gained by Prosecco DOCG worldwide is not only measurable using the data collected from exportations, but also through the successful events for promoting it and the tourism connected with the wine road.

Wine Road and promotional events

Wine tourism started in the Nineties, representing for Italy an innovative phenomenon which has brought an increase of tourism in the territory. (Haussman, 2005). Through traditional wine and food it is possible to represent the way of living, the quality of life and consequently they became the symbol of the country internationally.
The legacy with the territory is what makes unreproducible the wines and food and here lies the idea of creating a route for discovering the richness of the land. The huge potential of Italian wine and food can be manage with the use of wine roads which have became the main organisational model for governing the development of the territory and the offer of tourism. The wine road is the synthesis of the following components (Monterumisi, 2005):

- Product: wine and other traditional food;
- Territory: physical space and tradition inside it;
- Ecosystem: upgrading of the landscape and quality of the environment;
- Main characters: producers, tour operators, associations and institutions.

A wine road raised when there is a common will of all these actors to distinguish the land, its production, the culture and tradition enclosed within.
In Italian country, the first attempt to create a wine road was actuated in the Sixties between Conegliano and Valdobbiadene, in the left bank of the Piave river. At the beginning it was known as “Road of the whine wine” and it was defined by the restaurants and taverns located on the way. It was inaugurated in 1966 and it was 45 kilometres long, as an idea of the professor Italo Cosmo who later became the director of the Institute for the Viticolture of Conegliano. (Monterumisi, 2005).
The reference model was the German “Deutsche Weinstrasse” which is located

between Reno and Mosella Valley.

According to the Gazzetta Ufficiale, the national law n. 286 of 9th August 1996, wine roads are "percorsi segnalati e pubblicizzati con appositi cartelli lungo I quali insistono valori naturali, culturali e ambientali, vigneti e cantine di aziende agricole o associate aperte al pubblico".

The wine road is useful not only for advertising a territory and its products but also for aggregating the firms taking part to the project. In fact, enterprises operating in different sectors are connected by the common history and culture which is figuratively contained in the wine.

Fig. 20 Sign that can be found through the Wine Road. Picture taken from prosecco.it website

In 2003 was inaugurated the new wine road called *Strada del Prosecco e Vini dei Colli Conegliano Valdobbiadene* and it is the heir of the old route constituted in 1966. New itineraries were added to the old road in order to better improve the value of the entire territory, the landscape and the attraction from the historic to the artistic point of view.

It is about 120 kilometres long and is stretches in the hill from Conegliano to Valdobbiadene where is possible to taste the flavours of the secular history of these lands, their beauty and the products such as food and wines.

The land of the Prosecco DOCG can attract tourists from abroad because Italian

hallmark is synonymous of quality and the history of the territory is shown on the products of the land, as in this case in Prosecco. Heterogeneous actors made up a territorial system which was recognised as the First Sparkling Wine District in Italy in 2003 and through this recognition, it has opened up new possibilities for developing projects and promotional programmes. (Boesso, D'Orazio & Torresan, 2012).

The catalyst and tool of the business is the territory which is the "core focus in the cluster brand strategy" (Boesso, D'Orazio & Torresan: 45, 2012)

At a previous time the nobles met in the halls of castles and villas, in the area around Conegliano-Valdobbiadene to celebrate, to socialize and enjoy the pleasures of hospitality. Nowadays we invite people into a great hall: the territory of Conegliano and Valdobbiadene in which the typical product is not just Prosecco but the territory, the tradition and the culture. (Boesso, D'Orazio & Torresan: 45, 2012)

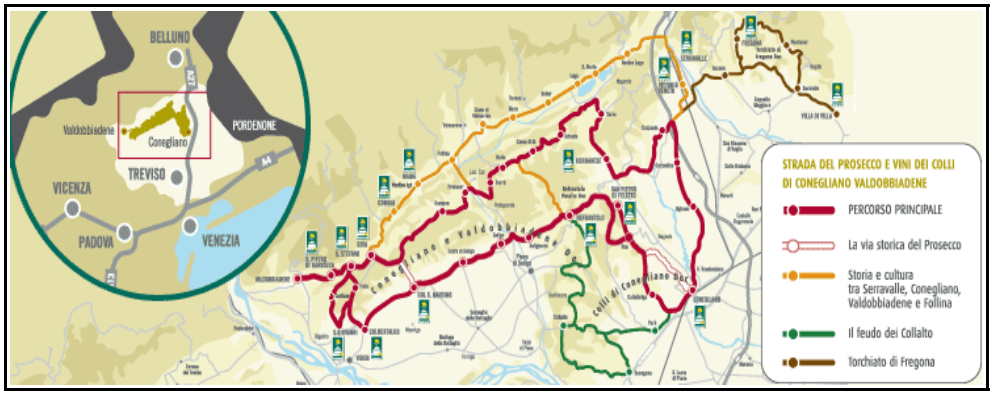

Fig. 21 Map of the Prosecco Wine road. Font: www.primaveradelprosecco.it

The value of the brand lies upon the long tradition of the territory and the quality of the product, done with the maximum cure and attention always in respect of the territory.

As explained in Tactics Cluster Marketing and Branding (2012), the marketing actions are directed to preserve the area and to promote it. Through the Prosecco wine road, guests have the opportunity to discover historic and artistic places and

at the same time taste the products, and Prosecco is one of the most famous and precious.

Among the firms interviewed, two out of five are no more taking part of the wine road because they have the idea that there are too many bodies that are doing and proposing similar activities and for economic reason they are forced to make a selection.

Some of them, depending also to the personal hobbies of the owners, are taking part to some activities of promotion that include also sport and entertainment.

For example. from 31st October to 3rd November 2013, was organised an event structured in four days of trekking by the organisation Trekking Italia located in Marghera, Venice. The route is aimed at discovering the territory and tasting of the wine is compulsory. Besides the physical activity which is practised in an amazing landscape, there is the possibility of visiting the wineries and directly approaching to the wine and its history.

Prosecco Cycling is another sporting event for promoting the territory and its product in a different way, that is by putting tradition closer with hobbies.

The Prosecco Cycling was organised for the last week end of September 2013 and gathered 2.000 participants from fifteen nations, that had the possibilities not only to see the beautiful sightseeing while cycling, but also taste the wine and other local products.

The fist week end of October 2013 in a prestigious area located between the city of Venice and Padua, Riviera del Brenta in Villa Foscarini in Strà, was organised the first stage of a national event dedicated to Sparkling wines and Italian methods of realisation.

The best Italian wineries gathered in the villa in order to present their labels to several operators in the sector, international buyers, owners of restaurants, journalists and wine lovers. Among all the Italian wine lists, it is known that the highest rate in export is represented by sparkling wines and among all the brands, Prosecco DOCG is one of the most successful and beloved internationally. In fact in 2013, Italy beats France regarding the wine sector, the production is about 45

hectolitres against 44 hectolitres of the antagonist. According to Coldiretti, the made in Italy export has reached an historical record, about 5 billion euros due to an increase of 9% purchases outside the nation.
Venetian wines occupy 30,8% of the national total and Prosecco is the wine that has better penetrated the foreign market and is still conquering new markets. (Daniela Boresi, Il Gazzettino articolo 4 novembre 2013 "Il vino Veneto conquista il mondo").
Actually 2013 is the tenth year in which the district of Conegliano Valdobbiadene Prosecco DOCG confirms its position as the best industrial district in export number as reported in a survey effectuated by Intesa San Paolo on productive district of the region. (Il Gazzettino 18 ottobre 2013). The hard work of the producers of the area and the institutions forming part of the industrial district is shown in the data concerning the exportations and the success of the events promoted in Italy and also all over the world, such as the already cited Vino in Villa.
The edition 2013 of the event has reached important levels, in fact it was recorded an increasing presence of foreign reporters from 23 different nations. In addition to that, besides the traditional event located in *Castello di San Salvatore,* the Consortium decided to add a tour in the Docg area for emphasising the importance of the territory in the realisation of the final product. According to the president of the Consortium, Innocente Nardi, the possibility of visiting the area is important for recognising the original Prosecco Superior and will help customers in avoiding the imitations. (Consorzio Conegliano Valdobbiadene Prosecco Superiore, giugno 2013).

The other side of success: imitations and falsifications

A proof of the global success of the wine can be seen also in the countless cases of imitations and counterfeits, and here lies the importance of the protection, actuated for example by the designations of origin.

During the interviewed, the importance of clarifying the difference between Prosecco DOC and DOCG was stressed with a particular emphasis, since the chaos created is one of the reason that can mislead the customer.
First of all, it is important to have clear in mind the area where they are produced, Prosecco DOC includes a wider area composed of 556 municipalities, instead the DOCG area is delimited in only 15.

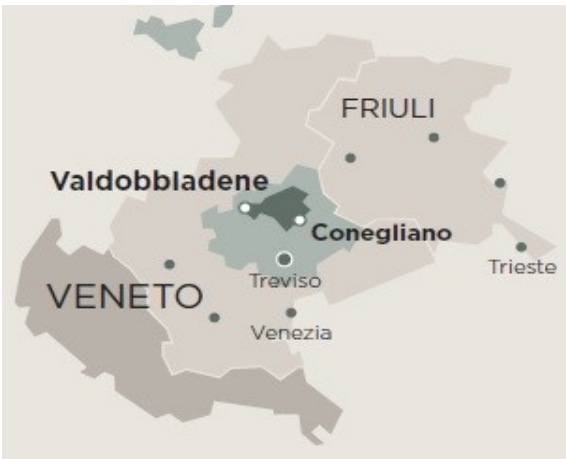

Fig. 22 C.I.R.V.E. (2012) Il prosecco Docg e Doc nel mercato nazionale ed internazionale. P. 1

As it can be seen in the map, the area coloured with dark green is smaller and it is also in a higher position that makes the grapevine growing more difficult, especially the harvesting operations and these are the reasons of the higher cost of Prosecco DOCG, because it needs more time and effort for being produced (more than 600 hours of hand work for each hectare).
It is important to highlight the characteristics of the product to prevent any possible cases of falsification. In an interview for TG Regione Europa on July 2013, Innocente Nardi affirmed that the product brings together culture and identity, it communicates its specificity connected to the territory representing the history of Italy abroad.
An important step forward regarding the protection of Prosecco was done in 2008 when a distinction between the grapevine and the wine was done. Glera has

became the name of the vine instead Prosecco has started to be used for indicating the wine; it was an useful decision taken by the consortium due to the fact that the name of the grapevine was internationally indefensible. (Consorzio Conegliano Valdobbiadene, 2011).

Another important action aimed at defending the product was actuated in 2009 with the recognition of the DOCG denomination. It was important because through adding a "G", a fundamental distinction was delineated among the Prosecco productions in the territories of Veneto and Friuli Venezia Giulia together with the protection of a human and natural heritage not only at national level but also at European level.

However, the firms interviewed affirmed that the chaos and the insufficient client's knowledge regarding the existence of two denominations can be mostly attributed to themselves because they did not clearly distinguish the two typologies (Doc and Docg) at the moment of presenting the products to international buyers.

Regarding the direct actions taken against possible imitations from third countries, the two denominations and the Docg Asolo are working together for protecting the common heritage. In fact, on July 2013 the producers associations of the three denominations met an EU delegation in Treviso in order to present the world of Prosecco in its varieties and different territorial expressions. (Consorzio Conegliano Valdobbiadene, 2013).

On the occasion, the theme of protecting the product was discussed in order to prevent any possible case of imitation by some third countries using bilateral pacts, such as with the USA.

It was also discussed the possibility to extend the Regulation number 1151 of 2012 contained in the Official Journal of the European Union regarding the quality schemes for agricultural products and foodstuffs. The rule is a warning towards every member states of protecting their products and the others, since the denominations of origin were recognised inside the ACTA agreements[18] context as

18 The ACTA Agreement (Anti-Counterfeiting Trade Agreement) is a commercial multinational

intellectual property and for this reason they should be respected and protected. The protection of Prosecco has to be seen at both levels, national level but extra-national. Regarding the national context, the protection is charged to the Ministry of Agricultural policy through its inspectorate body that monitors the situation in each regions.

The law number 61 of 2010 was an useful tool because when it entered into force, each Consortium had the possibility to exercise a surveillance role in the deals. Through the actuation of the law, it was possible to monitor the situation through some inspectors that will discover any possible frauds operated by sellers and through incorrect labelling. (Consorzio Conegliano Valdobbiadene, 2011).

The situation in the extra-EU countries is the most complex, in fact it is possible to defend the product only through single registration (trade mark) in every country and in case of imitation, the local court can be informed.

However, the program actuated by the three denominations (Prosecco Doc, Conegliano Valdobbiadene Docg and Asolo Docg) is fundamental because it makes possible the establishing of a single juridical subject with the purpose of defending the Italian heritage in Europe and worldwide.

The actions of the structure are not only aimed at fighting against possible imitations and registering the trademark of the denominations, but also creating a strong connection between the institutional bodies of the Region and EU that will highlight the importance of the product protection.

This activity added to the Docg recognition are examples of the intention of sustaining and protecting the work of all the actors of the district.

Almost all the wineries interviewed affirmed that they are not concerned about the possible imitations because they are sure that if the brand is registered and every bottles have the official mark impressed, the product is protected, at least inside the European Union.

At the same time they are sure that customers are searching for the original

pact aimed at establishing international standards for the enforcement of intellectual property rights. The formal publication was done in April 2011 and it would into force after having reach the sixth ratifications. Source: http://acta.ffii.org

Prosecco since the firms are working at district level for educating the clients on being able to recognised the real Prosecco Superiore and respect the culture and tradition under it by avoiding imitations.

At the end of the interviews that were useful tools for better understand the dynamics inside *Conegliano Valdobbiadene Prosecco Superiore* industrial district, it was possible to make a final evaluation of the work done. The year 2013 ended in a positive way for all the wineries that took part in the research. Some of them highlighted the fact that the success of Prosecco had started before the crisis, and probably this is a positive factor for the current good performance. At the same time, the strong will in presenting the product to foreign markets and the appreciation received, make possible to be less exposed to the crisis. With the beginning of the crisis, wine producers witnessed a change in the choice of the markets, and international trade reached a growth of +60% compared to 2008, as testified by one interviewed.
In fact, the context of Prosecco is becoming every day more international and due to that, it is interesting to compare it to another sparkling wine which has gained appreciation worldwide and can be considered one of its competitors together with the French champagne, the Catalan cava.

CHAPTER III

A competitor of Prosecco Superiore in international markets: Catalan Cava and its cluster.

In the previous chapter, the Conegliano Valdobbiadene industrial district was described starting from the delineation of the production area, the different varieties of the wine and then focusing on the industrial district itself. The major actors composing it were illustrated and through the interviews submitted, it was possible to better understand the relationships existing among them.
The successful work of the industrial district was shown not only through the analysis of the international trade and the description of the several countries which are choosing Prosecco, but also through the events promoted and the turnout recorded. Besides these facts, there is also the several cases of imitation that testify the strong global interest originated.
This chapter wants to present another industrial district of sparkling wine, as a possibility of comparing two wines that have an international projection, Prosecco and Cava and the work of their industrial districts.
Starting from a brief introduction on Catalonia and its cluster policy, the Catalan wine cluster in which Cava resides is described for finally making a comparison with Prosecco through the analysis of the markets where they are exported.

3.1 Brief introduction on Catalonia, one of the autonomous communities of Spain.

Fig. 23 Own realisation from google maps.

Catalonia is one of the autonomous communities located in the northeaster of Spain. The autonomy was established in December 1979 and with the new statute of autonomy approved in 2006 and through the *Generalitat* as institutional system, Catalonia organises itself. (Lowell, 2013).

As it can be seen in the map above, it has an advantageous geographical position for the economy, as in the case of Veneto region where Venice has always been representing as a strategic point for trade.

Catalonia and its strategic position in the peninsula and in the Mediterranean sea makes the region a gateway to the South Europe. Roads, railway network, growing harbours and the new terminal T1 in Barcelona airport are efficient means for the development of trading and exchanging knowledge. (Generalitat website).

The industrial activity is grown not only around Barcelona but also in several industrial areas in the region. These characteristics made possible to convert Catalonia in one of the most industrial areas of Spain, especially regarding the chemical, food, energetic, metallurgic and transport sectors.
Furthermore, a particular attention was recently addressed to the new technologies and innovations, as in the case of the technological cluster 22@ in Barcelona, which is an example of the will aimed at replacing the old industries located in Poblenou with others more technologically advanced. (Generalitat website).
It is interesting to note that, besides tourism and its position in the Mediterranean sea that have made Catalonia famous worldwide, the region has also started to work for improving the local industries and firms which could in turn help the economic growth.
Among all the initiative supported by the government, the work conducted by the agency Acc1ò is extremely interesting regarding the cluster matter.
Acc1ò is the agency of the Generalitat of Catalonia, created in 2008 as the union of the previous organisations, CIDEM and COPCA, which works for researching competitiveness through promoting innovation and the internationalisation of firms, in fact the agency has 34 offices located all around the world. (Acc1ò website).
By being connected to the *Departament d'Empresa i Ocupació de la Generalitat de Catalunya,* Acc1ò is developing strategic projects and services that will be a support for the Catalan firms in helping the competitive differentiation, searching new opportunities and being prepared for any global challenges.
The work of Acc1ò is directed to take advantage of the competitive differentiation of each firms that might place them in a favourable position in the future. At the same time, the agency strongly thinks that success cannot be reach by firms without innovation and internationalisation.
Acc1ò with its central office located in Barcelona, five branches in the rest of Catalonia and a net of 34 branches worldwide placed in strategic areas, pretends to offer an aid for reaching the following objectives:

- Increasing the productivity of the Catalan firms and sustaining the innovation, technology and ability;
- Improving the position of the Catalan productions and services inside the international market;
- Intensifying the international presence of the Catalan firms and their products.[19]

Due to the fact that Acc1ò aimed at developing the power of differentiation, it is interested in working with the several clusters present in the region, as they are the competitive advantage of Catalonia, using words that echo Porter's reflection. Porter in fact highlighted the importance of companies for the economic competitiveness of a nation, but they have to adopt the appropriate strategies to address any challenges. (Gascón, Pezzi & Soy i Casals, 2010).
Catalan government understood that and therefore decided to begin a work in this field sure that clusters are driving forces within the economy.
The clusters in Catalonia can be divided into 8 categories as follows:

- Design manufacturers cluster; all business areas which shared the need to efficiently manage design for example leather goods or jewellery.
- Industrial systems cluster; all business that have the development of efficient-time management systems as skill for success, as in the case of automotive or audio and video equipment.
- Tourism cluster; it included business such as theme parks or natural attractions. They should differentiate their products through specialisation in order to be distinctive.
- Health cluster; hospitals, medical laboratories and all those businesses that are sharing the need of managing specialised medical service.

19 For further information about Acc1ò, please see the website: www.acc10.cat
The website is available in Catalan, Spanish and also English.

- Fast moving consumer goods cluster; it includes for example food, detergents.
- Knowledge cluster; all activities which create and spread knowledge such as software manufactures, engineering companies and universities.
- Finance cluster; it includes the institutions that have a supporting financial role in the economy such as banks or insurance companies.
- Raw chemicals cluster; for this cluster it is important to improve the companies' environmental and safety standards.
  (Gascón, Pezzi & Soy i Casals, 2010: 39-40)

These eight clusters were described in the book published in 1992 called *The Competitive Advantage of Catalonia* under the supervision of Michael Porter, commissioned from Monitor Company, an international strategic consultancy firm. The work clarified the fact that the approaches up to that time failed to allow competitiveness. (Gascón, Pezzi & Soy i Casals, 2010).
Therefore, at the beginning of 1990s Catalan government understood that a new approach has to be taken and competitiveness has to be seen as dependent on companies' strategy. With the publication of that book, it was marked the beginning of the cluster policy in Catalonia.

3.2 Cluster policy: main actions undertaken by the Catalan government.[20]

The Catalan government cluster policy has been structured around four elements: competitiveness, business, company strategy and, of course clusters. (Gascón, Pezzi & Soy Ii Casals, 2010: 45).
Cluster is seen as a reference to reinforce the competitiveness of firms at regional level through the actuation of the initiatives studied by the administration for

20 The description of the main actions undertaken by the Catalan government are analysed following the work of Gascón, Pezzi & Soy Ii Casals (2010) Clusters and competitiveness: the case of Catalonia.

strategic purposes.

According to the studies effectuated on the matter (Gascón, Pezzi & Soy i Casals, 2010), the implementation of cluster policy in Catalonia can be divided into two phases: the first one is from 1993 to 2004 and the second one is from 2004 to 2009.

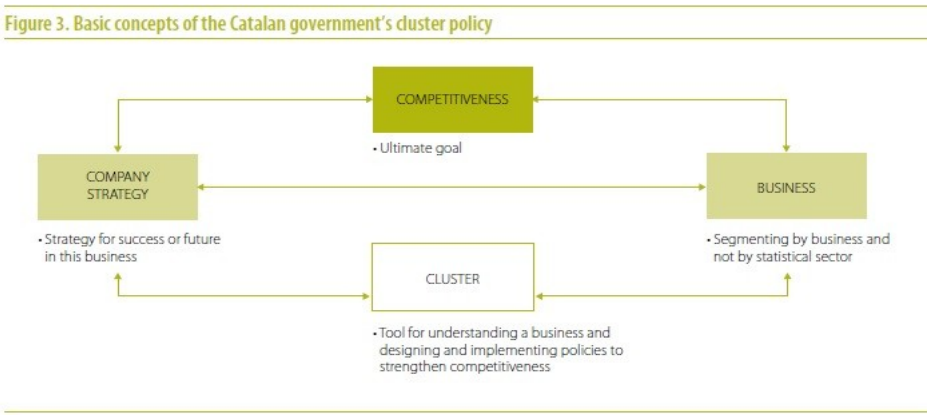

Fig. 24 Concepts at the basis of the Catalan government's cluster policy. Taken from: Gascón, Pezzi & Soy i Casals (2010) Clusters and competitiveness: the case of Catalonia (1993-2010). P. 45.

As reported in the studies effectuated, the beginning of the 1990s was a period of economic and industrial crisis and at the same time an important opening up of the economy resulting from the creation of the Single European Market. In this context, the then Department of Industry and Energy of the Catalan government decided to undertake an industrial and business policy in order to reinforce the competitiveness of the clusters present in the community, inspired by Porter's work.

The model that was proposed stressed the importance of actively aid the enterprises, especially the small and medium ones, in reshaping their strategic decisions in order to reach an operative efficiency that will help to overcome any challenges in the future.

Catalonia government understood the importance of a good strategic positioning as fundamental tool for strengthening competitiveness, and in 1993 it became the

central idea of the new cluster policy. (Gascón, Pezzi & Soy i Casals, 2010).
According to Conejos and Hernández (1999) three structural changes were done; first of all, from the transition from sector to strategic segment since the sector was too general instead strategic segment is where real competition is and where companies share common problems and common solutions. An example is the old textile sector passed to be the knitwear segment. (Gascón, Pezzi & Soy I Casals, 2010: 46).
Second, the Catalan government decided to focus on the micro-cluster instead of the larger cluster, always with the aim of offering a more detailed description of the industrial area. In fact, instead of talking about the textile industry in Catalonia, it is possible to refer to knitwear in the Maresme so to a more defined area.
Lastly, the new policy led firms to be more informed and responsible through assuming specific responsibilities in the process.
In order to achieve a strategic change within the micro-cluster, the policy used a communicative strategy based on holding individual interviews, organising seminars and business trips. (Gascón, Pezzi & Soy i Casals, 2010: 47).
Through this working method, the members of the micro-clusters collaborated and finally defined the guidelines for enforcing their competitiveness. Over twenty initiatives were actuated in Catalonia between 1993 and 2004, and this new and innovative approach made Catalonia one of the first region in the world where was actuated a cluster policy as a business and industrial policy.
According to Gascón, Pezzi & Soy i Casals (2010), by implementing this new policy, the Catalan government changed the relation with the industrial world, defined the strategic sectors in its territory and identified the correct approaches to support companies. Firms as well benefited from the new policy, regarding the assessment of their strategies and the identification of new needs. It was also actuated the possibility of realising the cooperation among firms which could be an useful instrument for achieving efficiency. Finally, the reinforcement of the sectoral structures was important for the micro-clusters since they lacked of

associations that connect them and help the improvements of their competitiveness. (Gascón, Pezzi & Soy i Casals, 2010).

At the same time, the policy model had some limitations, for example since it was chosen to work with micro-clusters, the impact on Catalan industry was limited and not very significant. The public resources were scarce and for this reason the initiatives were focused on immaterial aspects.

The continuation of the project was difficult, in fact the instruments available to the Department of Industry were only in part used and no other public departments were involved except on rare occasions.

However, in 2004 it was decided to change the situation of stasis through the initiative of mapping the local production systems in Catalonia, introducing the second stage of competitiveness reinforcement policy (2004-2009).

The government took this decision after European Union's statement on the importance of mapping the clusters because they were perceived as essential tools of a good competitive policy.

Mapping the local production systems were done in two different stages; in the first stage the firms operating in the same businesses were identified and then concentrations that could not be considered a local production system were eliminated in the second stage. From this kind of study, 42 industrial local production systems were localised in Catalonia and they employed almost 235.000 people and generated a turnover of 45 billion euros. (Gascón, Pezzi & Soy I Casals, 2010: 62).

The map below shows in an effective way the concentration and distribution of the local production systems, strongly gathered around Barcelona especially in Vallès Occidental, Baix Llobregat, Barcelones and Vallès Oriental and then in Maresme, La Selva, Osona, Bages, Anoia and Alt Penedès.

In Girona as well the local production systems are worth noting with the following cities: Gironès, Garrotxa, Baix Empordà and Pla de l'Estany.

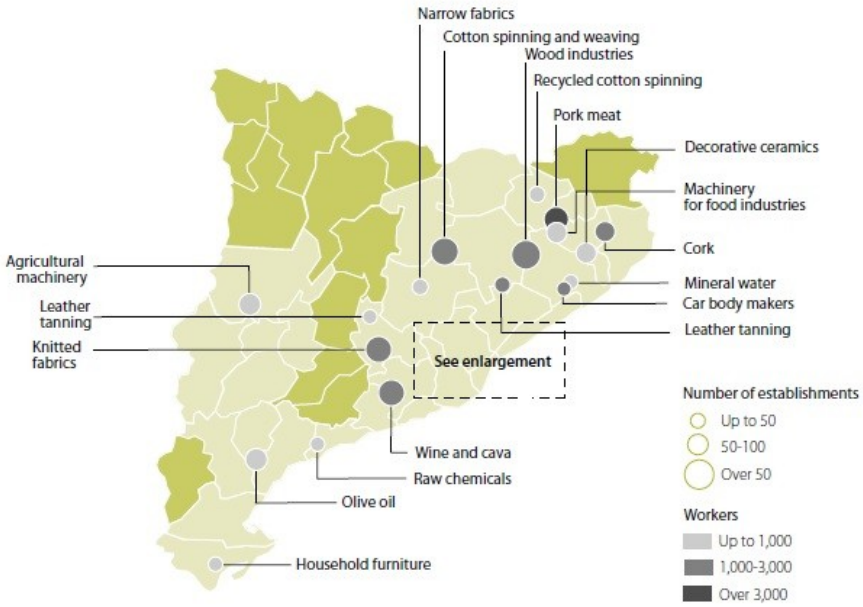

Fig. 25 Representation of the local production systems in Catalonia. Gascón, Pezzi & Soy I Casals (2010) Cluster and competitiveness: the case of Catalonia (1993-2010), p. 62.

The mapping initiative was important because it reviewed the previous action especially by eliminating the limitation regarding the focus on micro-clusters. Within the public administration, it was created a knowledge and information unit with the objective of analysing the clusters and industrial sectors in the Catalan economy in order to identify the weakness and reinforce their competitiveness. The Observatory for Industrial Foresight (OPI) was established as the responsible body for analysing the situation of the industrial sectors, identifying the weakness and proposing the measure for improving the situation. In the first phase, the OPI conducted interviews with companies and agents in the clusters for almost five months and finally produced documents of strategic and competitive analysis. (Gascón, Pezzi & Soy i Casals, 2010).

After the definition of the industrial agglomerations, the firms and the stakeholders involved, the strategic segmentation, the local context where the firms are located were analysed and the main areas of competitive improvement were identified for starting to design an action plan.

In 2004 with the appearance of the New Business Opportunities programme (NON), 4 million euros were allocated and it was considered an operational tool

to ease the strategic change in SME context. The programme helped to finance and support the companies in adapting to the new business models that were required, and during the five years of operation it supported more than 400 strategic and structural change projects most of all addressed to companies with few employees. (Gascón, Pezzi & Soy I Casals, 2010: 70).

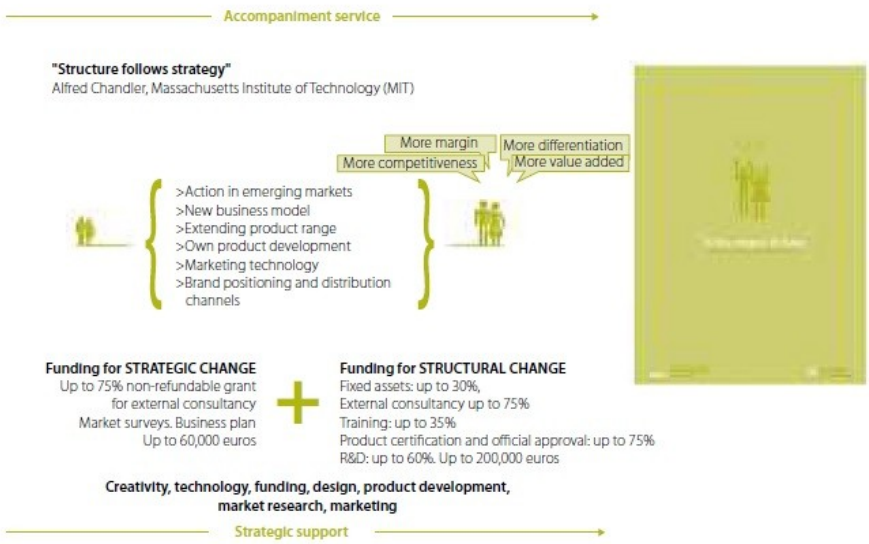

Fig. 26 Strategic plan of the New Business Opportunities programme (NON). Gascón, Pezzi & Soy I Casals (2010) Cluster and competitiveness: the case of Catalonia (1993-2010), p. 70.

In order to ensure the continuity of the competitiveness enforcing initiatives, it was decided to sustain the Catalan government's policy with the contributions of external agents, which were organisations already present such as public bodies, private and semi-public entities.

At the meantime, several competitiveness reinforcing strategies were actuated in a diversified ways. In some projects, it was decided to work with groups of companies that had not the classic cluster shape as they were not located in the same geographical area and did not belong to the same sector. Consequently, cluster became the tool for working with a group of firms with a common

strategic challenge. So the link among companies ceased to be the geographical concentration in favour of sharing same strategy and competitive challenges. (Gascón, Pezzi & Soy I Casals, 2010)

Other initiatives of diversification projects were promoted, and they were oriented towards the emergent clusters. In fact, the projects were addressed to contrast any obstacles to the rise of new strategic clusters and to permit their development. Another example of diversified initiative is represented by the *territorial innovation plans* where the territory is considered a central element of any projects. In this case, the starting point is represented by the territory and strategic and competitive analysis were used for delineating development plans. These projects were supported by local bodies and were implemented by the Cluster Promotion Area of ACC1Ó. (Gascón, Pezzi & Soy I Casals, 2010).

The creation of this unit within ACC1Ó is fundamental for supporting the continuation of these activities aimed at reinforcing competitiveness.

The case of Catalonia is interesting because it is one of the first regions in the world that has adopted a system for encouraging firms to reach competitiveness in a geographical area by improving the strategy and the working environment of its companies. It is also a learn by doing experience based on an original methodology and the phases of the policy can be summarized as in the figure below.

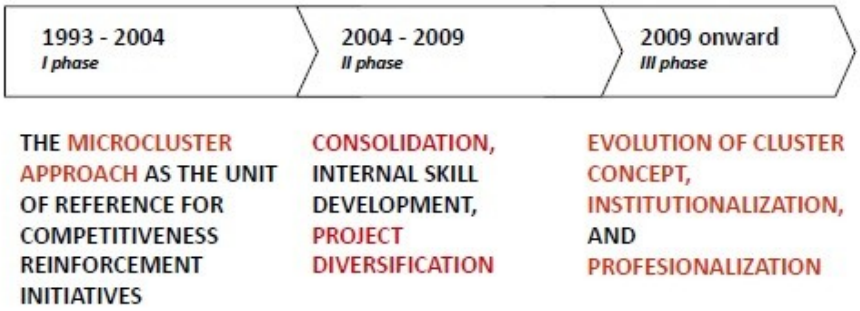

Fig. 27 Development of the cluster policy in Catalonia. Source: Pezzi A. (2012)

In the policy outlined, cluster is considered a tool extremely efficient for enforcing the competitiveness of the firms and for strengthening the net of relations among manufactures, suppliers and customers. Business projects are important output for the revitalisation of a cluster, especially nowadays in a world everyday more globalised, there is a need of finding a new competitive position and Acc1ó is working with a programme of strategic change and helps firms to chose and modify their business model. (Acc1ó website).

It is now interesting to open a parenthesis in order to make a comparison between the Catalan agency and a similar body in the Venetian territory, the already cited Veneto Innovazione. The latter is a regional agency that works for the applied research, innovation and technological transfer. It was established with the regional law n. 45 of September 1988[21] with the objective of promoting research and innovation within the Venetian productive system with a focus on SME. Among all the activities promoted by the agency, the one connected with the cluster is called TACTICS (see point 1.3).

The project is placed in the framework of the Pro Inno Europe initiative for relaunching the activities of the European Cluster Alliance. Inside this context, Veneto Innovazione was the responsible for the working group regarding the cluster marketing and branding, through the individuation of the best examples inside the current industrial districts and recommendations towards the policy makers.

It works not only on regional level by supporting the Veneto Region entity (*Regione del Veneto*) in the promotion, orientation and valorisation of the results of the projects of research and innovation, at the same time, it studies new and specific forms of interventions.

Regarding the international sphere, the involvement of Veneto Innovazione in European projects makes possible the maintenance and the improvement of the

21 For further information regarding the cited regional law, please see the *Consiglio Regionale del Veneto* website at: http://www.consiglioveneto.it/crvportal/leggi/1988/88lr0045.html

competences in the sector of policies and innovation services. The area dedicated to the technological transfer and internationalisation has the principle objective of promoting innovation and the applied research of the Veneto Region abroad, through the creation of strong relationships with foreign institutions and stakeholders.

Both agencies are working for the improvement of the SMEs situation not only inside the regional border, but especially abroad. They are taking part of a programme called Enterprise Europe Network (EEN), one of the largest net of technological transfer in the world, with more than 600 partners in 50 nations all over the world. Through this network, they are able to support the small and medium companies in their need of technology and research for increasing competitiveness. In this way, the process helps in giving value of the competences and know-how developed by the SMEs, research centers and universities promoting Veneto and Catalonia internationally.

Returning the attention to Catalonia, through the several projects supervised by Acc1ó, many companies have created a new way of doing business and it has turned into an effective instrument of industrial change.

Fig. 28 Image illustrating the latest cluster initiative in Catalonia. Source: Acc1ó website: http://accio.gencat.cat/cat/estrategia-empresarial/pimes/clusters/

The most recent cluster initiative now operating in Catalonia is the *Canvi estrategic,* that is aimed at changing and improving the companies' strategies for researching a better way of doing business. It is referred to 7 categories of sectors as reported in Acc1ó website:

- Water and energy;
- Food;
- Design manufacturing;
- Mobility;
- Health;
- Industrial systems;
- Cross sectoral.

It testifies the fact that Catalonia is still working for improving the

competitiveness of each macro-sector, implementing and supervising projects aimed at developing its industrial tissue.
The following section is dedicated to outline the most important policies of the Catalan Cava cluster together with an analysis of its main economic actors and finally its export markets.

3.3 The Catalan wine sector and Cava cluster

According to the book *Mapa dels sistemes productius locals industrials a Catalunya* (2005) the food and beverage sector of the Catalan industry is composed of more than 280 firms which are divided into 49% of food and the remaining 51% of wines and cavas. The sector represents one of the principal productive specialisation of Catalonia, with a weight of 15% of the total according to the volume of invoices. Instead, considering the total gross value added of the industry, it occupies the second place behind chemistry with a share of 11%. Finally, if it is evaluated the weight of each branch in the Catalan industrial employment, food and beverage sector occupies the third place with a significance of 11,5%.
It is interesting to note that Catalonia produces about 23% of the total Spanish food production and it represents about 20% of workers in terms of employment. The group formed by the beverage can be divide into two categories: cava and wines and all the other beverages (soft drinks, liquors, sidra or fermented beverages such as beers).
More than the 40% of the invoicing is represented by wines and cava, 30% is represented by other alcoholic drinks and the left percentage is for water and soft drinks.
Since Cava represents a considerable part of the agri-food sector, it is useful to have an idea of the history of the production and then the composition of the cluster and its international characterisation that makes Cava one of the competitors of Conegliano Valdobbiadene Prosecco DOCG together with

Champagne and Asti.

3.3.1 Cava: history and area of production

Most of the sparkling wine production in Spain is concentrated around the wine area of Penedès, specifically around the city of Sant Sadurní d'Anoia.

Fig. 29 Map showing the DO wine productions present in Catalonia. Source: Grapeful gourmet website http://www.grapefulgourmet.com

The area is one of the most ancient in Europe and it is known for the Cava production, which gained the denomination of origin in 1991 and 95% of the

Spanish Cava production is done in the area. (Medina & Tresserras, 2008).
The beginning of the production can be collocated in the last decades of 19th century, when some merchants and wine makers of the Penedès region decided that the wine cultivation could be an interesting chance of business. (Valls-Junyent, 2009). The starting idea was to try to imitate the wine that was imported from Champagne region, in France. In fact, the origin of the Spanish sparkling wine industry can be considered to be arise as an activity substituting the importations due to the increasing cost of the tariff withdrawals over the wine imports. (Consejo Regulador del Cava website)
In 1887, the phylloxera plague arrived to the region of Penedés, destroying most of the cultivated grapes in the area. This led to the restoration of a number of grape vines, as well as the introduction of some new varieties, especially a large collection of white grapes. This replanting was what helped Cava to develop and acquire its own personality, distinct from champagne and started to appear the first initiatives aimed at commercialising the production of sparkling wines. (Valls-Junyent, 2009). The wine-maker Manuel Raventós was who drove the local production by applying to the traditional method of producing champagne the grapes of the region. By doing so, the method gained importance and many producers started to produced this sparkling wine called Cava. The ambition of Manuel Raventós and its extraordinary entrepreneurial ability, made possible that in 1911 the bottles produced in Catalonia were more numerous than the bottles imported from France. In this way, the geographic structure of the industrial production changed by placing Saint Sadurní d'Anoia at the first place regarding the sparkling wine production.

However, the cluster started its configuration only during the First World War in Penedès around Sant Sadurní d'Anoia. At the end of the 20th century, in the capital of the Catalan sparkling wines, many wineries started to arise with a strong commercial projection.
In 1959 the Normas de Comercio de los Vinos Espumosos y Asificados were

established and in this context the cava denomination appeared for the first time. On 23rd April 1969 the Spanish Ministry of Agriculture regulated sparkling wines recognising the designation proper of the sparkling wine
elaborated through the system "clásico de fermentación botella y envejecimiento en cava" and the definition was useful for giving a denomination to the wine.
With the establishment of the Regulatory Council of Sparkling Wines (Consejo Regulador de los Vinos Espumosos) in 1972, Cava was institutionalised and obtained an own regulation which officially distinguished it from champagne and started to became one of its international competitors.
After the Spanish adhesion to European Union in 1986, Cava gained the protection of the international organisation and was recognised as a sparkling wine produced in a specific area. (Consejo Regulador del Cava website).
The role of the Consejo Regulador is similar to the Consortium of Prosecco DOCG, so it is entrusted to control the production, the elaboration and the quality of the wine, to protect from any cases of imitations in a juridical and institutional way and finally to promote the wine and expand its market.
According to the Consejo, the Cava region is composed of 159 municipalities of the provinces of Barcelona, Tarragona, Lleida, Girona, La Rioja, Álava, Zaragoza, Navarra, Valencia and Badajoz. (Consejo Regulador del Cava website). Only these cities can legally produce and commercialise the wine under the name Cava.
The different typologies of the wine are divided following the level of sugar contained inside, from the wine with less added sugar to the one with more as follows: Brut Nature, Extra Brut, Brut, Extra Seco, Seco, Semi Seco and Dulce.
As in the case of Prosecco, the Ministry of Agriculture promulgated a set of regulations concerning the denomination and its characteristics.
In fact, in the Cava regulations (first drafted in 1991) it was underlined the exact area dedicated to the production and the variety of grapevine used. Moreover, the entire process of elaboration is carefully described as well as the labelling and packaging actions. [22]

22 The full regulations are available at: http://www.crcava.es/consejo.htm

A section of the regulation (art. 40) is completely dedicated to the Consejo Regulador and its principal roles, among all there are:

- to control the production, the elaboration and the quality of the wines;
- to protect Cava denomination and avoid any cases of imitation;
- to promote Cava and increase its competitiveness in the foreign markets;
- to encourage the study related to the improvement of the cultivation techniques and other activities aimed at the betterment of the production.

The importance of this body can be compared to the Consortium of Prosecco Docg as both are the reference entities for the production and for all the actors composing the cluster.

3.3.2 Actors composing the Catalan wine cluster, from wineries to suppliers and promotional entities.

According to the definition of Michael Porter (1998) clusters are geographic agglomerations of interconnected firms and institution in a particular field.
In this case, the field is the Cava sparkling wine production, and the wineries represent the focal firms around which all the others arose.
In fact, the increasing importance gained by the wine sector in the region of Penedés, especially after the Eighties when the betterment of the techniques of production increased the productivity, making the region the symbol of the Catalan wines and permitting the appearance of important auxiliary sectors such as the companies providing machines for the production, packaging, labelling and corks suppliers. Always referring to Porter's definition, clusters include a variety of linked industries and entities important to competition such as suppliers of specialised inputs (machineries, components and services).
In the case of Cava, the increasing importance of the wine sector in the Penedès

made possible the emergence of auxiliary sectors in charge of providing packaging, glass bottle, labels and stainless steel tanks.
Regarding the machines used for the realisation of the final product, there are companies which provide the wineries with machines for each phases of wine production, from the grape harvesting to the pasteurization.
For cava production, it is fundamental the aid provided by a specific sector that is the elaboration of wine basis. The Consejo Regulador has a board of directors composed of 163 firms localised in the area of the local production system (SPL).
It is important to outline that the companies that provide corks are instead part of another cluster that is the one located in the regions of Gironès and Baix Empordà in the north-east of Catalonia. (AEI INNOVI, 2009).
Many clusters involve also governmental and other institutions such as universities, agencies for developing strategies and studies centers. (Porter, 1998).
The most important centers of studies and education related to the sector are competing in order to obtain the primacy in the excellence knowledge and make it available to the firms composing the clusters.
In this section, some of the most important schools and study centers will be listed even if not all of them are present in the cluster area but in the cities of Terragona and Barcelona. (AEI INNOVI, 2009).
In Sant Sadurní d'Anoia, in the core of the Cava production, is settled a wine and oenologic school, Escola de Viticultura I Enologia Mercè Rossell I Domènech established in 1987. In the school, the students gained an education which covers all the phases of wine production, from the transformation of the grape to the commercialisation.
In the Baix Penedès is instead located the Master on Wine International Trade and Marketing which is aimed at improving the knowledge of the exporters of wine and cava with a special focus on those family businesses with a projection towards the principal markets.
In Vilafranca del Penedès there is the Estación de Viticultura y Enología in its

abbreviation INCAVI, it is an organ of the Generalitat de Catalonia with the objective of promoting and controlling the Catalan wine productions and for this reason it is located in Vilafranca del Penedès.
Its activities is mostly related to the promotion of the wines and the development of studies aimed at improving the quality and the techniques of production. At the same time, it develops educational activities in order to build experts not only in the field of wine-making but also in the management and marketing affairs.
In Tarragona, outside the cluster area there is the faculty of Oenology of the University Rovira i Virgili which offers several possible careers from food engineering to biotechnology and oenology.
Again it was reiterated the importance of the study centers and universities since they are working for improving the product itself and also for creating a pool of future workers that could be essential for the continuation of the good functioning of the productive structure. Besides these entities, it is interesting to see that there is a body quite similar to the *Confraternita del Prosecco* (Prosecco Brotherhood) which is here called *Confraria del Cava,* settle in Subirats, Barcelona.
It is an association that has been dedicating to the promotion of the wine since 1979. Through its activities, it made possible the diffusion of the international fame of Cava, also through the *Setmana del Cava* (week of the Cava) when festive, cultural and technical events are organised to promote the wine not only inside the nation but also worldwide. As in the case of Prosecco, the members of *Confraria* are used to dress with clothes that remind people to the tradition and the local roots.[23] Every years during the week dedicated to Cava, is organised an International Conference which is assisted by many professionals from the sector. A figure that is always present during these events is the *Institut del Cava*, an association composed of Cava wineries established under the objective of representing and defending the production and at the same time developing its image and history through their activities.[24]

23 For further information related to the *Confraria del Cava,* please see the following website: http://confrariacava.com/web/
24 *Institut del Cava* has its origin in 1946 with the creation of the *Unión de Criadores y*

3.3.3 Governmental presence within the cluster: INNOVI as one of the *Agrupaciones Empresariales Innovadoras.*

Regarding instead the governmental presence within the cluster, the INNOVI association is an interesting example.
INNOVI is an association that formally represents the Catalan wine cluster, and it is registered as an AEI (Group of Innovative Enterprises) of the Spanish Ministry of Industry[25] and received the support of Acc1ò as Catalan cluster.
It was constituted in Vilafranca del Penedès in February 2009 with the aim of promoting the competitiveness of the wine sector of the area and consolidating the wine region of Catalonia as a global reference example in matters of innovation and quality. (AEI INNOVI, 2009).
The exact objectives of the association are the following:

- Achieve innovative projects through the cooperation among firms and entities in order to drive the flow of knowledge and the creation of ideas;
- Strengthen the exchange of knowledge between the universities, the studies centers and the firms;
- Define the policies and actions to be followed by the actors composing the cluster;
- Increase the training at all level, for example at university level;
- Plan strategic ways of development for the future of the sector;
- Drive the innovation of the firms inside the cluster. (INNOVI website)

From its origin, AEI INNOVI has proposed several projects in collaborations with

Elaboradores de Vinos Espumosos. With the incorporation of Spain to EU and the creation of the DO, in 1991 was founded the *Institut.* Font: http://www.institutdelcava.com/

25 The *Agrupaciones Empresariales Innovadoras* (AEI) are those companies registered in the AEI Registro Especial de AEI del Ministerio de Industria Energía y Turismo Español and due to that, are following a programme aimed at developing strategies for innovation and competitiveness of firms, and are sustained with public resources.

the actors of the cluster aimed at improving the competitiveness of the sector. With the emission of its strategic plan (2009-2012), all the structure of the cluster is analysed and at the same time several projects are described, from the optimisation of water consumption for making the cluster more eco-friendly to the creation of a new marketing plan for the valorisation of the DO Penedès.
It is important to outline the fact that the reference area of this AEI is composed of 12 denominations of origin, and among all it is present the DO Penedès.
More than 95% of the total Cava production is focused around Sant Sadurní d'Anoia even if the DO Cava is actually formed by 160 municipalities located in seven different autonomous communities of Spain. (AEI INNOVI, 2009)
The decision of institutionalised only one Catalan wine cluster under the name INNOVI was sustained by the necessity of simplification since it is easier to have one cluster instead of one for each wine regions of Catalonia. In fact, in the Penedès region itself are present two industrial districts specialised in the wine-making production.

Tabla 2. Distritos industriales localizados en el Penedès especializados en la Industria Vinícola, 2001.

Distrito Industrial	Sector de Especialización	Ocupados en el sector de especialización
Sant Sadurní d'Anoia	Industria Vinícola (Cava)	2.222
Vilafranca del Penedès	Industria Vinícola (Vinos tranquilos)	1.979
TOTAL		**4.201**

Nota: El nombre de cada distrito industrial corresponde al municipio central de cada sistema local; cada sistema engloba un conjunto de municipios que cumplen con determinados umbrales de centralidad y autocontención en el mercado de trabajo local (véase Boix y Galletto, 2006, *Op. Cit.*).

Fuente: Boix y Galletto, 2006, *Op. Cit.*

Fig. 30 Clusters localised in the Penedès. Font: AEI INNOVI (2009) Plan Estratégico 2009-2012, p.20

According to the studies of Boix and Galletto (2006), it is possible to identify two

industrial districts, the one of the still wine located in the area around Vilafranca del Penedès and the other one of the sparkling wine (Cava) around Sant Sadurní d'Anoia, as it is possible to see in the figure above.

However, AEI INNOVI in the layout of its strategic plan (2009-2012) affirmed that it is possible to talk about an unique cluster because both still wines and cavas share the same material and process of production and commercialisation are. A proof is the fact that many wineries produce and commercialise both typologies of wine even if the capital of Cava remains the city of Sant Sadurní d'Anoia.

The effective presence of a wine cluster in the region is testified by the analysis reported in three works. (AEI INNOVI, 2009).

Firstly, the work published by the Secretary of Industry and Energy of the Generalitat of Catalonia which is aimed at identifying the local production systems (SPL) in Catalonia, identified the system of wine production in the area of Penedès. (Hernández Gascón, Fontrodona Francolí & Pezzi, 2005).

Secondly, the work done by the General Direction of Politics for the SME together with the General Secretary of Industry of the Ministry of Industry, Tourism and Commerce on the Marshallian industrial districts. Among all the clusters identified, it was noted the importance of the wine industry in the Alt Penedès region.

Lastly, in the study of the Chamber of Commerce, Industry and Navigation of Barcelona done in 2006 where a chapter was fully dedicated to the sector of wine and Cava of Catalonia.

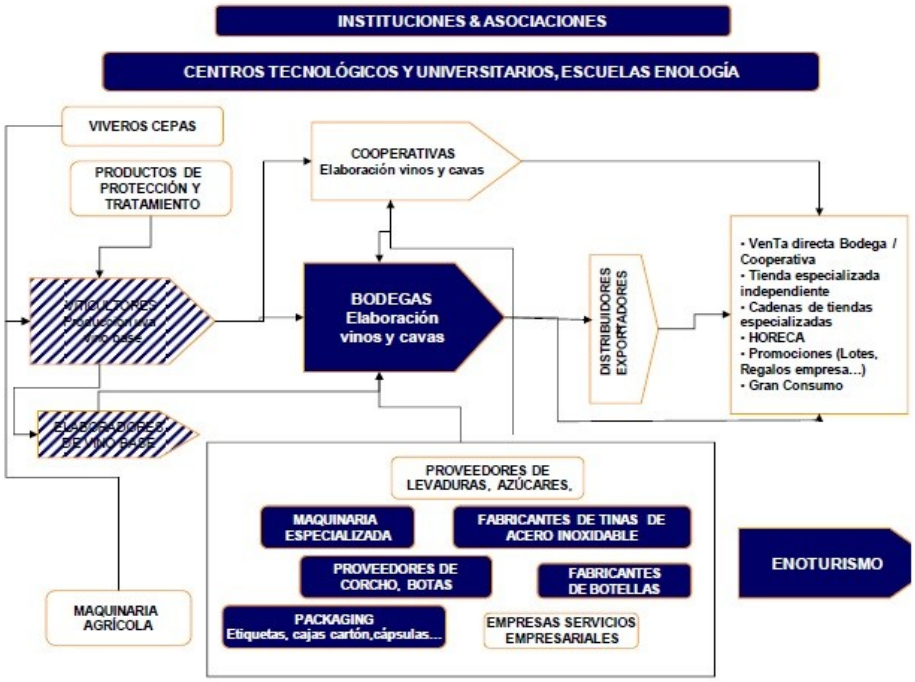

Fig. 31 Value chain of wine and cava cluster of Penedès. Font: AEI INNOVI (2006) Plan Estratégico 2009-2012 p. 28

In the figure above, it is represented the value chain of the wine and cava industry. Apart from the firms and entities that work for the realisation of the final product it is also interesting the wine tourism developed in the area of Penedès as in the case of Prosecco.

3.3.4 Enotourism in the area of Penedès

As Porter (1998) stated, the competitive advantage and the global success of a productive structure lies in the location. Catalonia among all the autonomous communities is the one that is mostly concerned in promoting its wine heritage and its denominations of origin are an effective examples of the recognised quality and tourism is a consequence.

DO Penedès is the most important denomination of Catalonia and one of the most interesting in Spain not only for its extension but also for the volume and value of

production and its prestige inside the national borders and especially worldwide. The landscape is one of the main attractions together with the open-to-visitors wineries and several events such as the already cited week of Cava. (Medinas&Tresserras, 2008).
As in the case of Prosecco and many others wine, in 1997 was created the project of a wine road called *Rutas del Vino y del Cava de l'Alt Penedès* and in 1999 passed under the administration of the Consortium for the Tourism Promotion of Alt Penedès and now it is an interesting way for clients to appreciate and know better the product that they choose.

3.4 The main export markets of Cava and a comparison with Prosecco Docg.[26]

3.4.1 The main export markets of Cava.

Cava is one of the wines with the most relevant presence in the international market and due to that, it is defined as a competitor of Prosecco Docg together with Champagne.
The fact that in 1977 there were only 65 wineries registered and at the time there are around 250 has a reflection also in the exportation numbers. (Díaz, Garicano, Esteban, Guevara, Sancho and Castro, 1989; Consejo Regulador del Cava, 2013). It can be said that also the sector of Cava has not suffered for the global crisis apart from the year 2009 when it was noted a slight decrease immediately inverted the following year.

26 It must be considered the fact that the data are referring to the DO Cava since they are collected from the Consejo Regulador website. However, it is known that mostly of the Cava production is rooted in Penedès region.

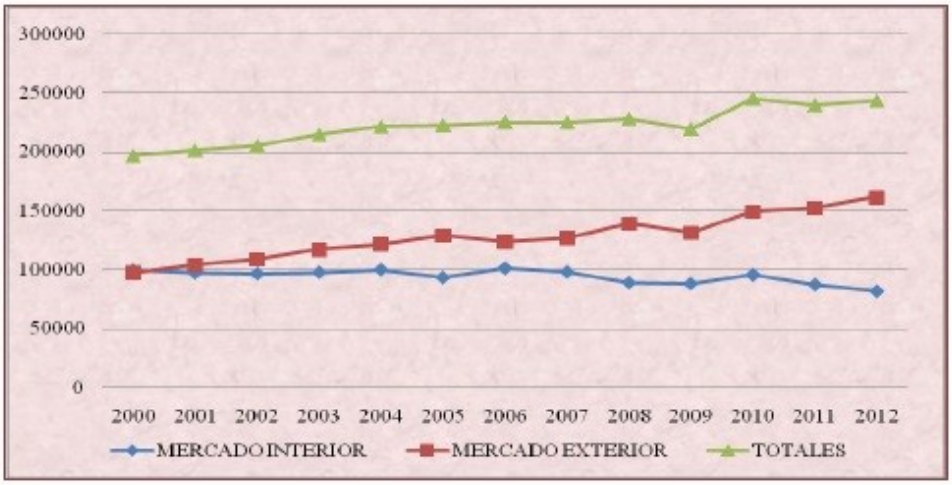

Fig. 32 Evolution of the Cava production. Font: Laura Benito Medel (2012-2013) Marketing del vino: ¿Cuántos colores puede tener el cava? p. 6

As shown in the graph above, it is evident how the foreign market has increased during the years and on the contrary, how much the internal market is observing the opposed phenomenon, as in the case of Prosecco Superior.

In 1988 the reference market for the Cava exportation were USA, Japan and the nations of north Europe such as Germany and Sweden and in recent years Germany remains the first importer.

COUNTRY	2008	2009	2010	2011	2012
Germany	51.419.077	34.912.073	41.063.331	40.365.392	39.460.789
UK	30.548.309	32.928.873	32.249.356	31.955.645	35.925.884
USA	14.477.896	14.805.033	17.512.477	23.205.033	24.848.524
Belgium	9.913.284	15.620.196	21.053.823	17.366.040	17.224.117

Fig. 33 Own realisation with the data collected from the *Consejo Regulador del Cava* website.

As shown in the table above, the first importer countries are Germany, UK, USA and Belgium and they recorded a quite stable trend during the years of the crisis testifying how the sector of Sparkling wine is efficiently competing against it, as is shown in the tables below.

7.- El Mercado del Cava en la U.E.

Evolución de las Expediciones U.E.*								
PAIS	1996	2000	2007	2008	2009	2010	2011	2012
Alemania	2161	51803	41006	51419	34912	41063	40365	39461
Reino Unido	1225	14043	32707	30548	32928	32249	31956	35926
Bélgica, Lux.	401	788	6238	9913	15961	21378	23570	25269
Francia	38	408	2584	2414	3387	3898	4221	4961
Países Bajos	218	1140	2528	2492	2175	2385	2776	2673
Finlandia	28	618	1951	2343	2542	2446	2722	2912
Suecia	1000	1684	2355	1813	2027	2305	2225	2443
Austria	90	760	973	1256	1347	1423	1354	1533
Dinamarca	367	724	1592	1397	1113	956	1081	1054
Polonia			235	303	175	320	495	523
Portugal	218	736	758	769	821	654	490	484
Letonia			106	85	53	90	340	586
Irlanda	42	105	313	369	227	255	322	231
Estonia			185	184	282	342	292	398
Italia	500	988	995	689	442	289	289	355
Lituania			105	134	141	164	241	285
Rep. Checa			115	100	126	205	136	224
Hungría			28	28	10	27	100	52
Eslovenia			79	119	88	62	92	140
Grecia	5	122	45	71	71	61	61	45
Eslovaquia			34	29	17	28	41	43
Rumania						19	25	26
Chipre			34	29	31	30	21	31
Bulgaria						6	14	26
Malta			5	12	4	12	11	12
Totales	**6293**	**73919**	**94971**	**106516**	**98880**	**110667**	**113240**	**119693**
Dif.(% +-)				12,16	-7,16	11,9	2,32	5,32
% U.E. S/.								
TOTALES	16%	76%	75%	77%	75%	74%	74%	74%

* en miles de botellas 75 cl.

Fig. 34 Evolution of Cava exportation towards EU countries. Font: Consejo Regulador del Cava website.

8.- El Mercado del Cava en los países terceros

EVOLUCIÓN DE LAS EXPEDICIONES PAÍSES TERCEROS *			
año	Botellas	Dif. s/año ant. (%)	% s/total export.
2000	23.100		23,81
2005	27.559		21,38
2006	28.653	3,97	23,19
2007	31.812	11,03	25,09
2008	32.404	1,86	23,33
2009	32.330	-0,23	24,64
2010	38.493	19,06	25,80
2011	39.006	1,33	25,62
2012	41.713	6,94	25,84

* (en miles de botellas de 75 cl.)

Fig. 35 Evolution of Cava exportation towards Third countries. Font: Consejo Regulador del Cava website.

It is evident how, apart from the year 2009 that was particularly critic due to the first consequence of the crisis, both in the EU and third countries market the

exportations have increased in volume.

3.4.2 Comparison between exportations of Cava and Prosecco in traditional, strategic and new markets.

In this section, a comparison between Sparkling Prosecco and Cava in the foreign markets context is made, as they are the sparkling wine with the higher international characteristic together with French champagne.
The comparison will be done by analysing the competitive aspect of Cava and Prosecco regarding the percentage variation in the years 2011-2012 in volume, value and price. The analysis will be done following the division and data reported in the Report 2013 of the Studies Center of Prosecco Docg.

Traditional markets

Following the classification done by the Studies Center, the traditional markets grouped the following countries: Germany, Switzerland and Austria.

Wine	Germany	Switzerland	Austria
Prosecco DOCG	-	+	-
Cava	+	+	+

Fig. 36 Trend of the exportations of Sparkling Prosecco and Cava in traditional markets. Own realisation following the data reported in Centro Studi di Distretto (2013) Da prodotto a simbolo p. 72-74

Starting to analyse the situation in Germany, it is not a surprise to recognise the primacy of the Catalan cava since it is the reference market from ages in fact it has the primacy regarding the performance in volume and in value.
The same situation is represented in Austria, where the decrease in Prosecco export number makes possible the prevalence of Cava in the market. The

situation is instead different in Switzerland, where Prosecco recorded a +30,5 % in value instead Cava showed an increase of only 2,5%.

Strategic markets

Wine	UK	USA	Canada	Russia	Eu countries
Prosecco DOCG	+	+	+	+	+
Cava	+	+	+	-	-

Fig. 37 Trend of the exportations of Sparkling Prosecco and Cava in strategic markets. Own realisation following the data reported in Centro Studi di Distretto (2013) Da prodotto a simbolo p. 74-79

The situation of Prosecco in the strategic markets is absolutely favourable, starting with the UK where it reaches the best performance regarding the value and the average price (+42,7% and +6% respectively in respect of 2011, in front of 37,5% and -6,3% of the Cava).

Usa market is as well more favourable to Prosecco in value and in volume, but Cava reached a +10% in average price respect of 2011 instead Prosecco recorded only +1,3%.

In Canada as well Prosecco has an optimum position especially if it is considered the volume and value growth, even if Cava hold the primacy regarding the average price, with a growth of +4,5% in respect of 2011.

In Russia and in the remaining Eu countries Prosecco has the primacy compared to Cava, reporting the best performance in terms of volume and value, where Cava recorded a decrease of -49,2% and -41,2% respectively in Russia and -49,2% and -41,3% in other European countries.

New markets

Wine	Latin America	Brazil	Australia - New Zeland	Japan	China	Asian & African countries	Benelux	Scandinavia
Prosecco DOCG	+	+	+	+	+	-	+	-
Cava	+	+	+	+	+	+	+	+

Fig. 38 Trend of the exportations of Sparkling Prosecco and Cava in new markets. Own realisation following the data reported in Centro Studi di Distretto (2013) Da prodotto a simbolo p. 79-87

The best performance regarding the value and the volume could be ascribed to Prosecco Docg in the markets of Benelux, Brazil, Australia and New Zeland, Japan and China.
In Latin America Prosecco is experimenting a growth and it is getting close to the level of Cava with a growth rate in volume of +3,7% in 2012.
In the others African and Asian countries as well as in Scandinavia, Prosecco is overcome by Cava which is witnessing much more performing results.

The reported data are essential to prove that Prosecco can successfully compete with another sparkling wine characterised by a strong orientation to export in the foreign market.
According to the data regarding the export of 2013, Prosecco is the sparkling wine most sold in the world, surpassing not only Champagne but also Cava with around 330 millions of bottles sold[27]. The cooperative work of all the actors of the district has made Conegliano Valdobbiadene Prosecco Superiore a wine no more connected mostly with the Christmas time as in the case of Cava as shown by the scheme reported.

27 Data collected during the presentation of the annual report of the Conegliano Valdobbiadene Studies Center hold on saturday 14 December 2013 in Villa Brandolini, Pieve di Soligo.

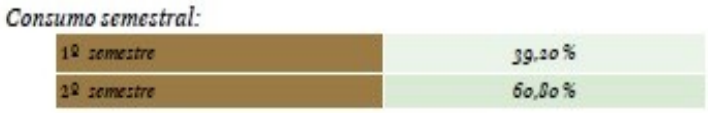

Fig. 39 Cava consumption 2012 divided in two semesters. Font: Consejo Regulador del Cava website.

The characteristics of Prosecco and the marketing actions carried out by the Consortium has brought to a global standardisation to the Italian way of consuming Prosecco, making it a wine for every day life.

Having presented the cluster related to a competitor of Prosecco Docg, not only has highlighted similarities in the productive structure and promotional events but it has given the possibility of analysing the trend and preference of foreign markets.

Both wines have a strong presence in the international market which is the evidence of the good teamwork made by the industrial district especially in the aspect of promotion of the territory and its product.

On the other hand, the analysis of the Catalan wine cluster has at the same time brought to light some considerations regarding the actual situation and the future of the Conegliano Valdobbiadene district, questions and considerations that will be discussed in the following conclusion.

Conclusions

The district of Conegliano Valdobbiadene Prosecco Superiore has been presented as an interesting case of global success rooted in tradition and territorial knowledge. At the beginning, it could be seen as a paradox in words, since the industrial district is defined as "a concentration of specialised industries in particular localities" (Marshall, 1890) so initially it seems to be an economic and productivity structure self-contained. Instead, the present work has outlined how the locality is fundamental in a district but not necessarily constraining.

In the case examined, territory is the starting and focal point of the productive activities due to the fact that it is the receptacle of the pool of workers and the flow of knowledge. At the same time, it is the framework in which the production is inserted and developed. In short, territory contains the social and cultural capital that feeds the industrial production inside the district.

It is no surprise that the Report 2013 of the Conegliano Valdobbiadene Studies Center is entitled *"Da prodotto a simbolo"* stressing the importance of the territory which has also become a guarantee for quality in foreign customers' mind.

Consequently, besides the activities strictly connected to the industrial production and its commercialisation, promotional entities arose connected with the other actors of the district with the objective of promoting the area through events not only dedicated to tourists but also to international buyers.

The entrance into the Tentative List of UNESCO is an important goal desired and finally reached for preserving and defending the territory which is the basic factor that had permitted the development of the wine district. Natural resources and favourable geographic conditions created that competitiveness advantage exploited and developed by firms arose around the wine-making industry.

The great global appreciation of this product whose history and way of production are strictly connected to the territory of Conegliano Valdobbiadene, is confirmed by the data regarding the turnout at events organised for promotional purposes,

tourism and the export numbers which permit to place Prosecco Docg next to the sparkling wines with the most developed international characteristics, Champagne and Cava.

The analysis effectuated on the structure of the Cava cluster has been important because it has helped to outline some weaknesses concerning the Prosecco district, a limitation that is strictly connected to the primary resource of the productive structure: the territory.

It is known that the land where Prosecco is cultivated is limited and, for satisfying the huge amount of demands which are also considered to increase in the following years, it is overstressed.

In order to avoid any possible future consequences related to that, the largest firms can consider the possibility of undertaking the internationalisation option. In particular, wineries can decide to relocate part of their activities abroad in order to expand the volume of their production.

An effective example is testified by some wineries composing the Catalan cluster, where the increasing number of sales in the international market paralleled the international development undertook by the largest firms of the sector. For instance, Freixenet, one of the most relevant wineries in the sector for its sales' number, has opened commercial branches in the main markets and also productive branches in some of the most famous wine regions in the world. (Valls-Junyent, 2009)

Does this “opening up” potentially ruin the characterisation of the industrial district? Can the geographic expansion of the net of relations, that before were inside or around the area of the district, contribute in weakening the systems?

The answer here proposed is no.

If the Conegliano Valdobbiadene wineries undertake an internationalisation path, the territory will not lose its importance as place where district competence and knowledge reside.

Undoubtedly, the same typology of Prosecco cannot be produced abroad, since through its denomination it reminds to the area located among the two cities in the

province of Treviso. Consequently, wineries should start an activity of *Versioning*, that is creating more varieties of the product using different denominations, therefore customers can have the possibility of choosing conscious of the differences among the productions, and firms have the possibilities of creating a variety of Prosecco more appropriate. In fact, a direct contact with the foreign reality is useful for understanding the need and taste of the demand, and having major control over the possible cases of imitation and falsification.

This operation of differentiation based on the area of production of the wine, can increase the value, also in monetary term, of the Prosecco produced in the Docg area. At the same time, the competitive advantage of the industrial district will not be lost since knowledge and organisational models could be transferred to the branches worldwide but the territory will always be considered the focal place containing knowledge, competences and the value of the made in Italy production so appealing to foreign customers.

The analysis of the Cava cluster has also brought to light another point that should be improved in the situation of the Italian districts in general: the lack of a specific policy in sustain of the strategic power of clusters.

Clusters in fact are the results not only of a development of particular skills and abilities in a territory that led to a productive specialisation by "natural causes", but they are also a results of governmental initiatives.

European Union defines clusters as important engines for economic development and competitiveness of a nation, not only of a region.

The objectives of a policy in sustain of industrial districts overcome the regional borders as in the case of Catalonia.

In fact, Spain understood the importance of clusters as tools of promoting industrial development, innovation and economic growth and launched several programmes that are still operating such as the plan in support of the Agrupaciones Empresariales Innovadoras (AEI).

On the contrary, in Italy the industrial districts are mostly seen as anchored to traditional manufacturing productions without considering the fact that they can

create the conditions for innovation and economic development. There is still someone that perceived them as an historical heritage more than a competitive tools for the future.

The industrial districts should indeed be seen as an useful means for reaching competitiveness in the international context and through strategic national and regional plans addressed to specific clusters, they can have the possibilities of following a clear bottom-up path to maximise their potentiality.

Italy is known to have strong clusters but a weak strategic policy for strengthening their competitive aspects, since many initiatives were even not actuated such as the one included in the *Finanziaria 2006*.

The district of Prosecco Docg on its side is working for following a strategic growth path through its Consortium and the support of Veneto Region. The annual reports are the proofs that the situation is constantly monitored, and the weaknesses are underlined in order to be reinforced the following year.

The strong commitment of all the actors of the district and the support of the regional institutions are giving the results in the success reported by the wine which has overcome not only the district borders but also the national.

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Università
Ca'Foscari
Venezia

Corso di Laurea Magistrale in Relazioni Internazionali Comparate
Laureanda: Elena De Lorenzi
Relatore: prof. Giancarlo Corò

Argomento tesi di laurea: Il distretto industriale del Prosecco di Conegliano Valdobbiadene, analizzato nel suo aspetto economico e culturale.

Lo scopo del seguente questionario/intervista è legato all'ottenimento di informazioni utili all'analisi della struttura distrettuale affrontata nell'elaborato.

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Con la compilazione, si autorizza l'Università Ca' Foscari e la laureanda al trattamento dei dati limitatamente ai fini di ricerca in ambito accademico.

Sez. 1 CARATTERISTICHE DELL'AZIENDA

1. Denominazione azienda, nominativo intervistato e posizione ricoperta

2. Anno di costituzione

3. Sede

4. Forma giuridica

Produzione:

5. Numero di bottiglie prodotte nell'anno 2012

6. Percentuale ricoperta dalla produzione di Prosecco DOCG

7. Andamento del 2013 rispetto all'anno precedente per quanto riguarda la produzione di Prosecco, risulta esserci un aumento del fatturato aziendale?

Sez. 2 ATTIVITA' SVOLTE ALL'INTERNO DELL'AZIENDA

8. Quali attività vengono svolte all'interno dell'azienda?

[] Coltivazione della vite

[] Vendemmia

[] Vinificazione

[] Spumantizzazione

[] Etichettatura e confezionamento

[] Commercializzazione

9. Quali attività vengono, invece, acquisite da fornitori esterni?

10. I fornitori fanno parte del distretto industriale?
Dove sono localizzate le loro sedi?

[] zona di produzione DOCG

[] provincia di TV ma non nella zona di produzione DOCG

[] regione Veneto ma in differenti province

[] altre regioni italiane

[] all'estero (indicare in quale paese)

Sez. 3 REALTA' DISTRETTUALE

11. L'azienda si sente effettivamente parte del distretto industriale?
Farne parte è un vantaggio? Per quale motivo?

12. Che tipo di rapporto intercorre tra le varie aziende che compongono il distretto (collaborazione, competizione, assenza di comunicazione etc.)

13. L'azienda ha un contatto diretto con altri importanti attori del distretto quali il Centro Studi, la Scuola Enologica, il Consorzio di Tutela etc.?

Sez. 4 MERCATO ESTERO

14. L'azienda esporta il prodotto Prosecco all'estero? Quota di export sul fatturato totale nel 2012? (Esprimere tale valore in forma percentuale)

15. Numero di paesi esteri con cui opera l'azienda, ed elencare i primi 3 paesi in ordine di importanza

16. Modalità d'entrata nei mercati esteri
[] esportazioni dirette
[] esportazioni indirette

17. L'azienda ha intrapreso un percorso di internazionalizzazione? Con che modalità?
[] joint ventures
[] Investimenti Diretti Esteri (di natura commerciale? produttiva?)
[] altro (indicare la modalità)

18. Che tendenza ha avuto il commercio internazionale negli anni dal 2008 al 2012? Esprimere in forma percentuale eventuali variazioni.

19. Quali strategie di espansione sono state adottate dall'azienda?

20. All'estero l'azienda si muove assieme ad altre imprese e/o alle istituzioni del distretto di cui fa parte? Quali?

Sez. 5 ATTIVITA' DI PROMOZIONE DEL PRODOTTO ED ATTIVITA' CULTURALI COLLEGATE

21. L'azienda organizza o prende parte ad attività di promozione del prodotto e/o del territorio? Quale?

22. L'azienda fa parte della Strada del Vino?

23. Poiché il Prosecco rappresenta la nostra cultura ed identità ed attraverso di esso portiamo una "fetta d'Italia" nel mondo, che tipo di iniziative pensa possano essere adottate per evitare la contraffazione da parte di altri paesi? Personalmente, teme l'imitazione da parte di produttori di altre nazioni?

DOMANDA FINALE

24. A fronte della crisi che colpisce il nostro Paese, l'azienda ed il vostro prodotto riescono a fronteggiarla “a testa alta”? Il 2013 finirà con un bilancio in positivo?

Ringrazio sentitamente per la collaborazione ed il tempo dedicatomi.